Conga CLM

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Cloud-based solution that standardizes, streamlines, and automates the contract lifecycle management process.

CLM Release Notes

Discover what's new in the latest release of Conga Contract Lifecycle Management.

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June23.11.17 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM June23.11.17 release. For documentation updates, see What's New in CLM Documentation.

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Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked (**New**) are new for this release.

> ⓘ You can register your org for the Conga Push Upgrade. Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it also ensures all the Conga published managed packages are on the latest versions for your registered orgs. For more information, see Registering for Conga Upgrade Program.

Package	Latest Certified Version Name	Latest Certified Version Number
Conga Base Library	4.1.245	4.245
Conga Contract Lifecycle Management **(New)**	14.1.709.6	14.709.6
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.7
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.50.5
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2
Conga CLM Adobe Sign Integration (*Required if you are using Adobe Sign*)	10.1.73	10.73.1
CongaSign CLM Integration (*Required if you are using Conga Sign*)	1.2.6	1.6

ⓘ For more information on installing CLM managed packages, see Installing Conga CLM. For more information on upgrading CLM managed packages, see Upgrading Conga CLM.
If you use CLM in Salesforce Lightning, you must enable the **Enable Files** Comply System Property.

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release. Keep checking the Documentation Portal for new updates.

Enhancements

The following enhancement is new to Conga CLM in this release.

Add Primary Contact in the Email's To Field

When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.

For more information, see Sending an Agreement Document for Review, Sending an Agreement Document for Parallel Review, Sending an Agreement Document for Collaborative Review Using Office 365 Review, Finalizing an Agreement, and Admin Entries.

Data Model Changes

There are no data model changes in this release.

Fixed Issues

The following table lists the issues fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00862456	CONTRACTS-13939	The following error displays when searching for a specific user during Microsoft Office 365 review: Cannot read properties of undefined (reading 'toLowerCase')

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.
CLM-7204	If a validation rule fails, the duplicate agreement is marked as transient.
CLM-6792	If you see the Import Large File button in the Additional Actions section of the action panel, you must not use it to import files. This option is disabled in Spring '21 release.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
CLM-5359	When you choose any value instead of the first value in the wizard lookup field in Salesforce Classic, the value resets to the first value.
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5917	If the **Set This Control Value** rule is set on an input field, you cannot modify the input in the wizard.
CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.

Conga Internal ID	Description
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
CLM-5207	The console app displays the Generate button even after the user has generated the document.
XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware files or attachment type document.
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	In the Salesforce One app, when a user clicks the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

June23.10.20 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM June23.10.20 release. For documentation updates, see What's New in CLM Documentation.

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Packages

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga Base Library	4.1.245	4.245
Conga Contract Lifecycle Management (**New**)	14.1.709.4	14.709.4
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.7
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.50.5
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2

Package	Latest Certified Version Name	Latest Certified Version Number
Conga CLM Adobe Sign Integration (*Required if you are using Adobe Sign*)	10.1.73	10.73.1
CongaSign CLM Integration (*Required if you are using Conga Sign*)	1.2.6	1.6

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System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release. Keep checking the Documentation Portal for new updates.

Enhancements

The following enhancement is new to Conga CLM in this release.

Restriction for External Reviewers

When you send documents for review using Office 365, external reviewers cannot accept or reject the changes in the review document. If the reviewers open the Office 365 review

documents on the desktop, the reviewers can see that the Accept and Reject options are disabled in the Review tab.

For more information, see Sending an Agreement Document for Collaborative Review Using Office 365 Review.

Data Model Changes

There are no data model changes in this release.

Fixed Issues

There are no fixed issues in this release.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.
CLM-7204	If a validation rule fails, the duplicate agreement is marked as transient.
CLM-6792	If you see the Import Large File button in the Additional Actions section of the action panel, you must not use it to import files. This option is disabled in Spring '21 release.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
CLM-5359	When you choose any value instead of the first value in the wizard lookup field in Salesforce Classic, the value resets to the first value.

Conga Internal ID	Description
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5917	If the **Set This Control Value** rule is set on an input field, you cannot modify the input in the wizard.
CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
CLM-5207	The console app displays the Generate button even after the user has generated the document.
XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware files or attachment type document.
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	In the Salesforce One app, when a user clicks the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

June23.09.22 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM June23.09.22 release. For documentation updates, see What's New in CLM Documentation.

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Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked (**New**) are new for this release.

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga Base Library	4.1.245	4.245
Conga Contract Lifecycle Management (**New**)	14.1.709.3	14.709.3
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.7

Package	Latest Certified Version Name	Latest Certified Version Number
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.50.5
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2
Conga CLM Adobe Sign Integration **(New)** (*Required if you are using Adobe Sign*)	10.1.73	10.73.1
CongaSign CLM Integration (*Required if you are using Conga Sign*)	1.2.6	1.6

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> If you use CLM in Salesforce Lightning, you must enable the **Enable Files** Comply System Property.

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release. Keep checking the Documentation Portal for new updates.

Enhancements

There are no enhancements in this release.

Data Model Changes

There are no data model changes in this release.

Fixed Issues

The following table lists the issues fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00859442	CONTRACTS-13133	Previewing a wizard displays the "Cannot read properties of null" error.
NA	CONTRACTS-12445	Trying to create an agreement using a wizard creates duplicate agreements.
00856345	CONTRACTS-12363	Executing a validation rule on Document Versions disables the Cancel button on Apttus__ImportOfflineContainer.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.

Conga Internal ID	Description
CLM-7204	If a validation rule fails, the duplicate agreement is marked as transient.
CLM-6792	If you see the Import Large File button in the Additional Actions section of the action panel, you must not use it to import files. This option is disabled in Spring '21 release.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
CLM-5359	When you choose any value instead of the first value in the wizard lookup field in Salesforce Classic, the value resets to the first value.
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5917	If the **Set This Control Value** rule is set on an input field, you cannot modify the input in the wizard.
CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
CLM-5207	The console app displays the Generate button even after the user has generated the document.
XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware files or attachment type document.
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.

Conga Internal ID	Description
CLM-2730	In the Salesforce One app, when a user clicks the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

June23.07.28 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM June23.07.28 release. For documentation updates, see What's New in CLM Documentation.

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Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked (**New**) are new for this release.

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga Base Library	4.1.245	4.245
Conga Contract Lifecycle Management **(New)**	14.1.709.2	14.709.2
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.7
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.50.5
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2
Conga CLM Adobe Sign Integration **(New)** (*Required if you are using Adobe Sign*)	10.1.73	10.73.1
CongaSign CLM Integration (*Required if you are using Conga Sign*)	1.2.6	1.6

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> If you use CLM in Salesforce Lightning, you must enable the **Enable Files** Comply System Property.

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release. Keep checking the Documentation Portal for new updates.

Enhancements

There are no enhancements in this release.

Data Model Changes

There are no data model changes in this release.

Fixed Issues

The following table lists the issues fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00848738	CONTRACTS-10831	When a date input field is not mapped to an object in the Lightning wizard, the date format changes in the wizard preview.
NA	CONTRACTS-11197	The Add More button on the Add Reviewers page does not work.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.
CLM-7204	If a validation rule fails, the duplicate agreement is marked as transient.
CLM-6792	If you see the Import Large File button in the Additional Actions section of the action panel, you must not use it to import files. This option is disabled in Spring '21 release.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
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CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
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XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware files or attachment type document.

Conga Internal ID	Description
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	In the Salesforce One app, when a user clicks the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

June23.07.14 Release Notes

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Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked (**New**) are new for this release.

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Package	Latest Certified Version Name	Latest Certified Version Number
Conga Base Library	4.1.245	4.245
Conga Contract Lifecycle Management **(New)**	14.1.709.1	14.709.1
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.7
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.50.5
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2
Conga CLM Adobe Sign Integration **(New)** (*Required if you are using Adobe Sign*)	10.1.73	10.73.1
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System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release.

Enhancements

The following enhancement is new to Conga CLM in this release.

Enhanced Send for Signature User Interface

The Send for Signatures user interface is enhanced for a better user experience.

For more information, see Finalizing an Agreement.

Data Model Changes

There are no data model changes in this release.

Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
NA	CONT RACTS -10961	When an intermediate Visualforce page is present between the Agreement Detail page and Send for Signatures page, the tab remains open after sending documents for signatures.
NA	CONT RACTS -10997	When there is a conditional date field in a wizard, the condition changes based on the time zone.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.
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Conga Internal ID	Description
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
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CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
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CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

June '23 Release Notes

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Conga Base Library (**New**)	4.1.245	4.245
Conga Contract Lifecycle Management (**New**)	14.1.709	14.709
Conga Content Integration	8.1.0020	8.20
Conga DocuSign API (*Required if you are using DocuSign*)	8.1.142	8.142.5
Conga CLM DocuSign Integration (*Required if you are using DocuSign*)	5.1.50	5.5

Package	Latest Certified Version Name	Latest Certified Version Number
Adobe Sign (*Required if you are using Adobe Sign*)	24.2	24.2
Conga CLM Adobe Sign Integration (*Required if you are using Adobe Sign*)	10.1.73	10.73
CongaSign CLM Integration (*Required if you are using Conga Sign*)	1.2.6	1.6

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System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see System Requirements and Supported Platforms Matrix.

New Features

There are no new features in this release.

Enhancements

The following enhancements are new to Conga CLM in this release.

Temporarily Migrate Workflow Rules to Flow

As Salesforce is starting the process of moving away from Workflow Rules and transitioning to Flow, you can temporarily migrate Workflow Rules in CLM to Flow. In the upcoming release, Workflow Rules will be migrated to Flow automatically.

For more information, see Migrating to Flow.

Run Clone, Amend, and Renew Processes in the Background

An admin can configure this feature when agreements have a large number of documents. When the value of the APTS_AsyncCloneAmendRenew admin entry is set to true, the cloning, amendment, or renewal process of an agreement happens in the background. Meanwhile, the user can continue to work on other agreements. The user receives an email notification after the cloning, amendment, or renewal process is complete.

For more information, see Managing Agreement Lifecycle Post-Activation and Admin Entries.

Retry Failed Document Review

If a document review fails while merging the reviewed document with the latest document, you receive an email notification regarding the failed review. You can retry the review up to three times. If the review fails again, you can cancel the review and initiate a new review.

For more information, see Sending an Agreement Document for Parallel Review.

Document Type for Imported Document

If you have an "Import Offline Document" field in the Wizard and use it to upload a document, the Document Type is marked as Agreement Document. If you have an "Import Supporting Document" field in the Wizard and use it to upload a document, the Document Type is marked as Supporting Document.

For more information, see Running Wizards in Lightning.

View Comments Icon

When you enter a comment for a field, you can see the comment icon. When you hover over the comment icon, you can see the added comment. For more information, see Running Wizards in Lightning.

View a List of Uploaded Documents

After uploading documents, you can see the number of documents uploaded beside Add/Remove Attachments. When you hover over Add/Remove Attachments, you can see the list of uploaded documents.

For more information, see Running Wizards in Lightning.

Set Default Value for an Input Field and Make it User Editable

A Wizard administrator can use the Set This Control Value rule for an input field to set a default value. When a user runs the wizard, the user can edit the field value.

For more information, see Configuring Step Input Rules from the Wizard Designer.

Removed Agreement Name and Type

When you run a wizard, you cannot see the Agreement Name and Agreement Type at the end of the Wizard screen.

Mark an Add Attachment Field as Required

A wizard administrator can mark the Add Attachment field in the Import Offline Document object as required. When a user runs a wizard and the Add Attachment field is marked as required, the user cannot proceed to the next step without uploading a document.

For more information, see Creating Inputs from the Wizard Designer.

Data Model Changes

The following objects and fields are introduced to or changed in the system or data model in this release.

Object	Field	Description	System/ User	New/ Changed
APTS_Agreement__c.object				Changed
	DocumentReviewLevel__c	Stores the value of the review Level of the imported document	System	New
DocumentImportLog__c.object			System	New
	AgreementId__c	Agreement ID of the imported document	System	New
	DocumentId__c	Document ID of the imported document	System	New
	DocumentName__c	Document name of the imported document	System	New
	ErrorLog__c	Error information while saving a field or clause to an agreement	System	New
	ExtractedData__c	Extracted results from the AI provider for the imported document	System	New
	MappedFieldClauseName__c	Mapped field or clause for the provision	System	New
	ProvisionName__c	Mapped Provision for the field or clause	System	New
	ProvisionType__c	Mapped provision type	System	New
	Resolution__c	Resolution accepted for the error	System	New
Reviewer__c.object				Changed

Object	Field	Description	System/ User	New/ Changed
	ReviewerCopyDo cumentVersionId_ _c	Reviewed document submitted by the reviewer		New

Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00808 561	CLM-8 299	When a user uploads a 25 MB document to an agreement in Salesforce Classic and activates the agreement after switching to Salesforce Lightning, the agreement does not activate. **Resolution info**: The APTS_AgreementDocumentActivateMaxFileSize admin entry allows you to increase document storage based on the Salesforce size limit. If the Salesforce storage limit for your org is increased to 25 MB or more, you must update this property to allow users to upload documents with the increased size limit. If the admin entry is not configured, the value is considered 5 MB. For more information, see Admin Entries.

Known Issues

The following table provides the cumulative list of known issues up to this release.

Conga Internal ID	Description
CLM-8215	Activity history is not recorded after sending documents for Conga Sign signatures.

Conga Internal ID	Description
CLM-7710	You encounter an error when you click in the TO field while sending a document for review using the Safari browser. **Workaround**: Use Chrome or Microsoft Edge to send documents for review.
CLM-7204	If a validation rule fails, the duplicate agreement is marked as transient.
CLM-6792	If you see the Import Large File button in the Additional Actions section of the action panel, you must not use it to import files. This option is disabled in Spring '21 release.
CLM-5367	In the Console tab, when you click **Cancel**, the tab does not close while sending for signatures and sending for review.
CLM-5359	When you choose any value instead of the first value in the wizard lookup field in Salesforce Classic, the value resets to the first value.
CLM-5988	When you use a checkbox object field in input rules condition, checked and unchecked options are not visible.
CLM-5917	If the **Set This Control Value** rule is set on an input field, you cannot modify the input in the wizard.
CLM-5976	When you open a wizard in the Classic mode with rules on a Lookup field, you encounter an error.
CLM-5367	The console app tab remains open on canceling sending for signatures and review.
CLM-5207	The console app displays the Generate button even after the user has generated the document.
XA-2718	On Partner Community portals, when you try to upload an offline agreement or check in an existing template to agreements in FX2 format from X-Author Contracts, an error message is displayed for version-aware and non-version-aware files or attachment type document.
CLM-3212	The Work Order custom object is not enabled for a template object of the Pre FX2 format.

Conga Internal ID	Description
CLM-3211	Agreement flow does not work for Communities in the Salesforce Lightning mode.
CLM-2730	In the Salesforce One app, when a user clicks the Agreement Actions from the Action panel once, the user stays on the same page. To go to the next page, the user must click twice. This is a Salesforce limitation for embedded Visualforce pages.
CLM-2690	In the Salesforce One app, clicking the lookup option does not open a new pop-up window.

About CLM

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

Conga CLM runs on the Salesforce platform and all the contract data is stored in Salesforce. Conga CLM data-handling practices are the same for Conga CLM 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.

As an administrator, you can design the user interface of Conga CLM by creating page layouts, customizing agreement actions, adding custom links, and customizing the action panel. Conga CLM lets you manage user profiles by configuring user permissions and secure the agreement documents by implementing document protection. With X-Author for Contracts, you can create agreement templates and agreement clauses and use Conga CLM to manage them. You can design workflows and agreement lifecycles in Conga CLM. You can integrate Conga CLM with eSignature solutions—Adobe Sign and DocuSign. You can also track agreement versions and secure agreement documents. Conga CLM allows you to schedule jobs to automate recurring tasks, such as refreshing agreement data, setting the expiration date for the links used to download multiple agreements, extracting intelligent data, and generating reports.

The following flowchart depicts the Contract Management process:

Conga Contract Management Process

Pre-Contract Request		Author and Negotiate			Store and Comply
Initiate, Request, Generate		Negotiate, Redline, Finalize, Activate			Repository, Search, Report, Obligations, and Compliance

Opportunity / Account → Create Agreement → Generate Document → Send for Review → Complete Negotiations → Activate Agreement → Reports and Dashboards

As a user, you can create a contract from pre-loaded templates or import a third-party document as an offline agreement document. Contract Management works with optical

character recognition software to scan imported third-party papers and convert them to a searchable PDF. You can send your agreement documents for eSignatures if Contract Management is integrated with eSignature solutions—Adobe Sign and DocuSign. Contract Management is able to provide a set of standard or customized, reports to track activity status, expirations, non-standard terms, etc. You can also use Agreement Explorer to configure and reuse searches and reports.

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

The following table lists the tasks that administrators and users can perform using CLM.

Administrator	Administrator/User
• Manage user profiles • Create, edit, and delete a user profile • Add single or multiple users to a user profile • Assign a license to a user • Apply security and permissions to a user profile • Configure user interface • Create and edit page layouts and record types • Configure custom links on the home page • Add the action panel • Configure an offline agreement window • Manage templates • Set up a template object • Secure documents • Organize agreement clauses • Manage template versions • Configure term exceptions • Configure dynamic document assembly • Configure auto and manual template publishing • Set up template filtering rules • Configure query templates • Manage agreements • Set up an agreement request process • Set up agreement record types • Customize agreement actions • Schedule jobs to refresh agreement data • Set up an agreement output format • Track clauses used in agreement documents • Control access permissions for agreements • Route documents to content libraries	• Work with agreements • Create • Generate • Send for review • Negotiate • Finalize • Sign/Execute • Activate • Manage agreement lifecycle post-activation • Amend • Renew • Terminate • Expire • Work with offline agreements • Create • Import • Review an agreement created by intelligent import • Store an executed agreement • Manage document and template versioning • Run the contract wizard to automate agreement creation • Create, run, and delete an Agreement Explorer report • Execute SOAP and REST APIs ⓘ For end-user functionality, see CLM for Users, CLM for SOAP API Developers, and CLM for REST API Developers.

Administrator	Administrator/User

• Configure agreement rules to route content
    • Configure intelligent import
    • Configure agreement versioning
    • Implement agreement protection
    • Configure contract wizard
• Manage workflow
    • Create, edit, delete, and validate workflow rules
    • Configure workflow and approval email alerts
    • Configure retention policies
• Configure reports
    • Manage cycle time reports
    • Configure Agreement Explorer
 	
ⓘ For administrator functionality, see CLM for Administrators.	

Key Terminology

It is important to understand how terms are used when working with Conga CLM.

Term	Definition
Action panel	A collection of agreement action buttons on the user interface that can be enabled for the Agreement Record page in the Classic mode for community portals.
Agreement	A set of terms and conditions agreed upon by two or more parties.
Agreement actions	The actions available at various stages of the agreement such as Preview Agreement, Generate Agreement, Regenerate Agreement, Generate Supporting Document, Send for Review, Send for Signatures, Import Offline Document, Activate, Amend, Renew, Expire, Terminate, and Cancel Request.

Term	Definition
Agreement document	A document generated by merging information stored in a record with an existing template.
Agreement Document Protection	A feature that helps protect your documents when they are generated in Microsoft Word format. Contract administrators can configure document protection rules so that a contract user can perform any of the lifecycle actions, depending on the protection rules that are applied to specific user roles. There are four document protection types such as ignore, unprotect, prompt, and automatic.
Agreement Explorer	A search and reporting feature that allows you to search for records in the Agreement object using configurable and reusable search reports.
Agreement Line Item	A product or service line item that is associated with an agreement.
Agreement Lock	A feature that represents a lock on the agreement. The agreement is locked by the logged-in user automatically after the user checks out the agreement document. Only users with UnlockCheckedInDocument action permission can unlock the locked agreement.
Agreement Protection	A tab in the Conga Contract Management application that specifies protection settings (available on the Agreement Wizard) for agreements.
Agreement Rule	A condition that allows you to configure how an agreement request is processed when the user clicks Submit Request. Based on the administrator-defined criteria for a specific agreement record type, agreement rules can dictate if: • A document is generated automatically when the agreement is submitted for processing. • An agreement is sent to a queue for review and processing.

Term	Definition
Agreement versioning	A solution framework for document versioning at the agreement record level.
Amend	An action that enables you to modify the terms of an active agreement.
	It creates a new version of the agreement record with an "amended" relationship to the original agreement. The new, amended record shares the same base agreement number as the original, with the decimal point incremented by one.
Apttus Retention Policy Schema	An XML schema that describes the retention policy specification.
	A retention policy determines the length of time a record must be stored. Generally, organizations apply retention policies to all records sharing certain characteristics, such as record type, region, and owner.
	You can edit the specification of a retention policy to define the date until which the agreement is retained.
Clause	A modular block of text that is used frequently across multiple templates.
Content libraries	An alternative contract repository option to organize files and manage user permissions.
Contract	An agreement between two or more entities, with specific terms.
Contract wizard	A wizard that prompts the end user to answer a series of on-screen questions, and then creates the Agreement record.

Term	Definition
Contract Document Versions	A solution framework used for document versioning at the Agreement record level. 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 (for example, "1.0.0").
	The first version of the document is created after you have created and generated an agreement. Subsequent versions are added during the review and negotiation phases. Version values are numerically incremented as various actions are taken on the document by different users.
Contract Management	The process of systematically and efficiently managing contract creation, execution, and analysis.
Cycle Time Reporting	A feature that enables organizations to track the elapsed time between any two statuses or status categories.
Custom link	Allows you to add a customized link to internal or external URLs.
Document	A dynamically generated output through merging information stored in an agreement record with the static text of an existing template. Output documents can be sent for review, approval, or signature.
Dashboard	A user interface that organizes and presents key statistics in an easy to understand format
	Agreement records that you own or have permission to access are displayed in the Agreements dashboard. You can customize the dashboard by configuring a ribbon that provides a quick view of the agreements and their corresponding status categories.
Document Finder	A feature that helps contract managers, sales persons, and legal teams to easily filter and find agreement documents directly from an agreement record.

Term	Definition
Document output format	Document format (file type) to be used for generating an agreement document.
Dynamic Document Assembly	A feature that enables you to configure filter rules that drive a sequence of prescribed dynamic clause or attachment insertions in a generated document.
Expire	An action that marks the agreement as Expired after the agreement term ends.
Intelligent import	Intelligent data extraction functionality lets you import a third-party paper. Conga CLM works with optical character recognition software to scan the imported third-party paper and convert the document to a searchable PDF. ⓘ **Note** You need to have an Intelligent Import license to process third-party paper in Conga CLM.
Merge web Service	Merge Web Service APIs for generating and manipulating documents.
Object	A definition of a specific type of information that you can store in Salesforce. Some objects are native to Salesforce, such as Contacts or Accounts, while others are specific to Conga functionality, such as Templates or Agreements.
Offline agreement	A third-party paper that you want to use as a basis for your contract.
Organization/Org	An organization (org) is a Salesforce instance with a defined set of licensed users. An org is the virtual space provided to Conga CLM by Salesforce. Your org includes all of your data and applications, and is separate from all other orgs.

Term	Definition
Page layout	A UI element that allows you to organize the layout on an object detail or edit page. You can use Page Layout to organize the following elements for your users: • Fields, related lists, and custom links • Field properties (visible, read-only, and required) • Page section customizations
Query template	This feature allows you to narrow down the list of templates available for document generation.
Record	A collection of fields with information about a specific item of a specific type (represented by an object), such as a Contact, an Account, or an Opportunity.
Record Type	An element that allows you to offer different business processes, picklist values, and page layouts to different users. A record type defines which page layouts users see when they view agreement records, based on their user profile. For example, you can create record types to differentiate your regular sales deals from your professional services engagements, offering different picklist values for each.
Redlining	Allows you to identify the changes made by reviewers and accept or reject changes according to your business requirement.
Renew	An action that enables users to create a new version of the agreement.
Reports	Salesforce delivers standard report folders that contain reports for each record type. For example, Accounts, Opportunities, Leads, and so on.
Retention Policy	A rule that determines the length of time a record must be stored.
Template	A blueprint to generate a variety of document types when merged with data from agreements or quotes.

Term	Definition
Template filtering rules	The Template Selection page can be configured to set up user-defined filters to narrow the list of Templates displayed to the user for Preview/Generate/Generate Supporting Document/Regenerate tasks.
Template versioning	A solution framework of document versioning at the Template level to track template versions against generated documents.
Term exception	An exception clause or term is a stipulated condition in your agreement to grant or prevent certain allowances to or from a particular group of users in your agreement.
Terminate	Action on the Agreement Details page that enables users to terminate an active contract.
User profile	A set of permissions granted to a group of users for the purpose of limiting feature accessibility. According to a user's role in an organization, Conga CLM Administrator can assign a profile to the user. There are five basic profiles associated with Conga CLM—Administrator, Contract Manager/Template Admin, Read Only, Requester/Approver, and Contract Creator/Negotiator.
Wizard	A wizard that prompts the end-user to answer a series of on-screen questions and then creates the Agreement record.
Wizard Component Library	A tab that enables you to create reusable inputs and steps for your wizard designs.
Workflow rule	Enforcement of key business processes, allowing you to automate tasks, email alerts, field updates, and outbound messages without the need to write any code.

For more information about terms used with Conga products, see Conga Product Glossary.

What's New in CLM Documentation

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

June '23

Document	Publication Date	Topic	Description
June '23	📅 17 Nov 2023	Sending an Agreement Document for Review	Modified topic. Added note: When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.
		Sending an Agreement Document for Parallel Review	Modified topic. Added note: When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.
		Sending an Agreement Document for Collaborative Review Using Office 365 Review	Modified topic. Added note: When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.
		Finalizing an Agreement	Modified topic. Added note: When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.
		Admin Entries	Modified topic. Added APTS_IncludePrimaryContact admin entry.

Document	Publication Date	Topic	Description
	📅 06 Jun 2023	Activating an Agreement	Modified topic. Added prerequisite about the APTS_AgreementDocumentActivateMaxFileSize admin entry.
		Admin Entries	Modified topic. Added the following admin entries: • APTS_AgreementDocumentActivateMaxFileSize • APTS_AsyncCloneAmendRenew
		Managing Agreement Lifecycle Post-Activation	Updated overview.
		Sending an Agreement Document for Parallel Review	Modified topic. Added details about retrying the review.
		Running Wizards in Lightning	Modified topic. Added details about wizard enhancements.

February '23

Document	Publication Date	Topic	Description
February '23	📅 19 May 2023	Sending an Agreement Document for Parallel Review	Modified topic. Added details about retrying the review.
	📅 05 May 2023	Managing Office 365 Review	New topic.
		Preparing for Office 365 Review	New topic.
		Setting Up Office 365 Review	Modified topic. Added details about SharePoint and Azure app configuration.

Document	Publication Date	Topic	Description
	📅 02 Jan 2023	Sending an Agreement Document for Collaborative Review Using Office 365 Review	Modified topic. Added details regarding the mixed review.
		Managing Office 365 Review	Modified topic. Added details regarding the SharePoint site configuration.
		Activating an Agreement	Modified topic. Added details about restricting email notifications and selecting publish option.
		Admin Entries	Modified topic. Added the following admin entries. • APTS_RestrictEmailToCurrentUserOnActivate • APTS_ActivateDocumentsSelectAll • APTS_ActivateDocumentsSelectable • APTS_ActivateDocumentsPublishAll admin entries
		Importing an Offline Document	Modified topic. Added details about removing meta data in the imported documents.
		Configuring Activation Settings	New topic. A new feature for this release.

September '22

Document	Publication Date	Topic	Description
September '22	📅 08 Aug 2022	Sending an Agreement Document for Collaborative Review Using Office 365 Review	Modified topic. Added details regarding adding or removing reviewers.
		Merging Documents in Salesforce Lightning	Modified topic. Added details about the APTS_DefaultHeaderFooter OptionForMerge admin entry.
		Admin Entries	Modified topic. Added details about the APTS_DefaultHeaderFooter OptionForMerge admin entry.
		Lite User License FAQs	Modified topic. Added a FAQ.
		Upgrading Conga CLM	Modified topic. Added upgrade details.

May '22

Document	Publication Date	Topic	Description
May '22	📅 22 Apr 2022	Generating Registration Setting	Modified topic. Added a prerequisite and updated contact information.
		Configuring CSP Trusted Sites	Modified topic. Updated contact information
	📅 08 Apr 2022	Setting Up Conga Contract Intelligence for CLM	New topic. A new feature for this release.
		Importing an Offline Document Using Contract Intelligence for CLM	New topic. A new feature for this release.

Document	Publication Date	Topic	Description
	📅 05 Apr 2022	Sending an Agreement Document for Collaborative Review using Office 365 Review	New topic. A new feature for this release.
		Configuring Office 365 Settings	New topic. A new feature for this release.

December '21

Document	Publication Date	Topic	Description
December '21	📅 22 Apr 2022	Generating Registration Setting	Modified topic. Added a prerequisite and updated contact information.
		Configuring Trusted CSP Sites	Modified topic. Updated contact information.
	📅 27 Dec 2021	Provisions Supported by Conga AI	New topic. A new feature for this release.
		Supported File Sizes in Lightning	Modified topic. Added file size limits for Conga AI
		Managing Offline Agreements	Modified topic. Added details about Conga AI
	📅 17 Dec 2021	Admin Entries	Modified topic. Added details about APTS_TranslatePickValuesInDocs.

Document	Publication Date	Topic	Description
	📅 29 Oct 2021	Adding the Review Status Panel on the Agreement Detail Page	New topic. A new feature for this release.
		Prerequisites for Parallel Review	Modified topic. Added prerequisites.
		Configuring the Send for Review Custom Button	New topic. A new feature for this release.
		Supported File Sizes in Lightning	Modified topic. Added file size limit for the cloned, amended, and renewed agreements.
		Importing an Offline Document	Modified topic. Added details about importing an offline document by updating an existing document version.
		Comply System Properties	Modified topic. Added the Ancestor selection for Import Offline comply system property.
		Status and Status Categories	Modified topic. Added details about In Clause Approval status.
		Admin Entries	Modified topic. Added details about APTS_AgreementStatusOnClauseApproval.
		Enabling and Customizing the Action Panel	Modified topic. Added details about Upload Reviewed Document and Send for Conga Sign.

Document	Publication Date	Topic	Description
		Sending an Agreement Document for Parallel Review	Modified topic. Added details about the new UI for sending documents for review.
		Installing Conga CLM	Modified topic. Removed details about user experience analysis.
		Working with Documents	Modified topic. Added details about configuring the columns.
		Configuring Documents Tab in Lightning	Modified topic. Added a prerequisite.
		Comply User Properties	New topic. A new feature for this release.
		Configuring APTS_ComplyConfig	Modified topic. Added details about copying documents to the cloned, amended, or renewed agreement.

Summer '21

Document	Publication Date	Topic	Description
Summer '21	📅 22 Apr 2022	Generating Registration Setting	Modified topic. Added a prerequisite and updated contact information.
		Configuring CSP Trusted Sites	Modified topic. Updated contact information.
	📅 09 Aug 2021	Registering for Conga Upgrade Program	New topic.
		Installing Conga CLM	Modified topic. Added details about registering for push upgrade.
		Upgrading Conga CLM	Modified topic. Added details about registering for push upgrade.
		Configuring Notification Email for Review Cycle Cancellation	New topic.
	📅 05 Jul 2021	Setting Up Quick Search on the Home Page	New topic. A new feature for this release.
		Populating the File Size Field	New topic. A new feature for this release.
		Configuring Documents Tab in Lightning	New topic. A new feature for this release.
		Generating Registration Setting	New topic. A new feature for this release.
		Configuring Old Activation UI	New topic. A new feature for this release.
		Configuring the Send for Review Custom Button	New topic. A new feature for this release.
		Working with Documents	New topic. A new feature for this release.

Docum ent	Publicati on Date	Topic	Description
		Using Smart Search to Search Content in Agreement Documents in Lightning	Modified topic. Added details about Smart Search enhancements.
		Configuring Intelligent Discovery Settings	Modified topic. Added details about deleting intelligent data discovery settings.
		Migrating Mappings from Salesforce to Intelligent Data Discovery	Modified topic. Added details about migrating mappings from Salesforce to intelligent data discovery.
		Mapping Provisions to Project-Record Type	Modified topic. Added details about delete mappings from the AI engine.
		Sending an Agreement Document for Review	Modified topic. Added details about new UI.
		Sending an Agreement Document for Parallel Review	Modified topic. Added details about the following enhancements: • New UI for sending documents for parallel review • Sending multiple documents for parallel review • Character limit for end review comments • Adding multiple contacts to a review cycle • Configuring email notifications for review cycle cancellation
		Activating an Agreement	Modified topic. Added details about publishing options.
		Reviewing an Agreement Created by Intelligent Discovery	Modified topic. Added details about the new UI.

Docum ent	Publicati on Date	Topic	Description
		Supported File Sizes in Lightning	Modified topic. Added details about file sizes supported by Smart Search.
		Admin Entries	Modified topic. Added details about APTS_SkipFileSplitWhileSavingFile.
		Comply System Properties	Modified topic. Added details about the following properties: • Parallel Review for related agreements • Filter By The Primary Agreement Status

Spring '21

Document	Topic	Description
Spring 2021 (Rev C)	Custom Permissions	Modified topic. Added a note about default permission.
	Assigning Custom Permissions to User Profiles	Modified topic. Added a note about default permission.
Spring 2021 (Rev B)	Migrating Attachments to Files	Modified topic. Added a prerequisite.
	Admin Entries	Modified topic. Added *APTS_SkipFileSplitWhileSavingFile* admin entry.
Spring 2021 (Rev A)	Upgrading Conga CLM	Modified topic. Added a post-upgrade task.
Spring 2021	Upgrading Conga CLM	Modified topic. Added details about upgrading CLM.

Document	Topic	Description
	Setting Up Organization-Wide Email Address	New topic. A new feature for this release.
	Comply System Properties	Modified topic. Added the following comply system properties: • Organization-Wide Email Address Display • Use Organization-Wide Email Address Deprecated Enable Online Contract Collaboration property.
	Admin Entries	Modified topic. Added the following admin entry: • APTS_ExcludedNamespaces
	Configuring Wizards as Self-Service with Salesforce Sites and Communities	Updated section. Removed content related to guest users. *With the Spring '21 release, Salesforce has removed the View All, Modify All, edit, and delete permissions for guest users in all orgs. Hence, Conga CLM does not support guest user access.*
	Configuring the Availability of Custom Buttons	Modified topic. Added details about configuring custom buttons.
	Enabling and Customizing the Action Panel	Modified topic. Added details about configuring custom buttons.
	Editing Classic Email Templates	New topic. A new feature for this release.
	Configuring New Activation UI	New topic. A new feature for this release.

Document	Topic	Description
	Configuring In-Effect View Page Header	New topic. A new feature for this release.
	Configuring MS Teams Setting	Modified topic. Added details about MS Teams job.
	Configuring Smart Search	New topic. A new feature for this release.
	Online Contract Collaboration	Removed content related to Online Contract Collaboration. See the Online Contract Collaboration (OCC) Administrator Guide for information related to OCC.
	Mapping Clauses and Fields to Provisions	Removed page. Deprecated feature.
	Reviewing an Agreement Created by Intelligent Discovery	Modified topic. Added details about tracking the document upload progress and viewing large processed documents in the document viewer.
	Accessing In-Effect View	Modified topic. Added details about configuring In-Effect View header fields.
	Activating an Agreement	Modified topic. Added details about the new activation UI.
	Sending an Agreement Document for Parallel Review	Modified topic. Added details email notifications.
	Using Smart Search to Search Content in Agreement Documents in Lightning	New topic. A new feature for this release.

Document	Topic	Description
	Online Contract Collaboration	Removed content related to Online Contract Collaboration. See the Online Contract Collaboration (OCC) User Guide for information related to OCC.
	Sending a Document for Signatures	Added details about the sendForSignature API.

Winter '20

Document	Topic	Description
Winter 2020 (Rev E)	Configuring Wizards as Self-Service with Salesforce Sites and Communities	Updated section. Removed content related to guest users. *With the Spring '21 release, Salesforce has removed the View All, Modify All, edit, and delete permissions for guest users in all orgs. Hence, Conga CLM does not support guest user access.*
Winter 2020 (Rev D)	Managing Alternate Clauses	New topic. A new feature for this release.
	Configuring OCC Permissions	New topic. A new feature for this release.
Winter 2020 (Rev C)	Configuring Email Templates in Lightning	Modified topic. Changed the temporary folder name.
Winter 2020 (Rev B)	Installing Conga CLM	Modified topic. Added details about the new theme.
	Configuring Intelligent Discovery Settings	Modified topic. Added details about useAnalytics.

Document	Topic	Description
	Enabling and Customizing the Action Panel	Modified topic. Added the following custom buttons: • In Effect View • View Hierarchy
Winter 2020 (Rev A)	Tracking Agreement Clause Versions	Modified topic. Updated clause actions.
	Reviewing an Agreement Created by Intelligent Discovery	Modified and renamed the topic.

Document	Topic	Description
Winter 2020	Contract Lifecycle Management with Salesforce Lightning	Modified topic. Added details about the new action panel.
	Enabling and Customizing the Action Panel	Modified topic. Added details about configuring the action panel.
	Admin Entries	Modified topic. Added the following admin entries: • Added APTS_SkipContentSearchForActivation • APTS_SkipRemoveDraftDocumentOnActivation • APTS_RetainFileNameForParallelReviewMergedDocument Updated the following admin entries: • APTS_AsyncMergeEmail • APTS_ContentRepositoryType
	Removing the Path Field	New topic. A new feature for this release.
	Configuring Email Templates in Lightning	New topic. A new feature for this release.
	Configuring OCC Access Modes and Sharing Settings	New topic. A new feature for this release.
	Configuring Intelligent Discovery Settings	Modified topic. Added new configuration steps. Renamed Intelligent Import as Intelligent Discovery.
	Configuring Intelligent Discovery Status Panel in Lightning	New topic. A new feature for this release.
	Conga CLM on Salesforce Lightning	Modified topic. Added details about the new action panel.

Document	Topic	Description
	Reviewing an Agreement Created by Intelligent Discovery in Classic	Modified topic. Added details about: • Importing large files • Accessing highlighted, non-highlighted, and processed documents that are retrieved from Kira.
	Activating an Agreement	Modified topic. Added details about skipping steps during activation.
	Sending an Agreement Document for Parallel Review	Modified topic. Added details about: • Canceling review • Uploading a reviewed document • Refreshing review cycle status • Ending review • Sending large files for review • Retaining file name for the merged document
	Sending an Agreement Document for Review	Modified topic. Updated configuration steps.
	Activating an Agreement	Modified topic. Added details about skipping steps during activation and updated configuration steps.
	Importing an Offline Document	Modified topic. Updated configuration steps.
	Importing Supporting Documents	Modified topic. Updated configuration steps.
	Working with Different UI Modes	New topic. A new feature for this release.
	Launching Documents	Modified topic. Added details about access modes. Removed content related to document protection.

Document	Topic	Description
	Accepting or Rejecting Suggestions in Documents	Modified topic. Renamed the topic. Added details about access modes. Removed content related to document protection.
	Working with Comments	Modified topic. Added details about access modes. Removed content related to document protection.
	Working with Smart Data	Modified topic. Added details about access modes. Removed content related to document protection.
	Working with Clause Library	Modified topic. Added details about access modes. Removed content related to document protection.
	Publishing Documents	Modified topic. Added details about access modes. Removed content related to document protection.
	Limitations	Modified topic. Added new limitations.
	FAQs	Modified topic. Added new FAQs.
	Searching Agreement Documents	Modified topic. Updated configuration steps.
	Uploading Signed Documents	Modified topic. Updated configuration steps.
	Finalizing an Agreement	Modified topic. Updated configuration steps.
	Generating an Agreement	Modified topic. Updated configuration steps.
	Reviewing an Agreement Created by Intelligent Discovery	New topic. A new feature for this release.

Document	Topic	Description
	Reviewing an Agreement Created by Intelligent Discovery in Classic	Modified topic. Updated configuration steps. Renamed Intelligent Import as Intelligent Discovery.
	Working with Offline Agreements	Modified topic. Renamed Intelligent Import as Intelligent Discovery.
	Creating an Offline Agreement	Modified topic. Renamed Intelligent Import as Intelligent Discovery.
	Importing an Offline Document	Modified topic. Renamed Intelligent Import as Intelligent Discovery.
	Storing an Executed Agreement	Modified topic. Renamed Intelligent Import as Intelligent Discovery.
	Supported File Sizes in Lightning	New topic. A new feature for this release.
	Supported File Sizes in Classic	Modified topic. Renamed topic.

Summer '20

Document	Topic	Description
Summer '20 (Rev A)	Admin Entries	Modified topic. Added APTS_XAAddInLoadType admin entry.
	Package Multiple Documents	Modified topic. Added details about RetainInputHeaderFooter and CumulativePageNumber parameters.

Document	Topic	Description
Summer '20	Configuring Documents Tab in Lightning	New topic. A new feature for this release.
	Configuring Document Action Column in Classic	New topic. A new feature for this release.
	Admin Entries	Modified topic. Added the following admin entries: • APTS_CustomLinksForActionPanel • APTS_TemplateSelectionGuidance
	Comply System Properties	Modified topic. Added the following comply system properties: • Enable Online Contract Collaboration • Intelligent Import for Signed Document
	Mapping Clauses and Fields to Provisions	New topic. A new feature for this release.
	Configuring Intelligent Import Settings	Modified topic. Added details about new fields.
	Mapping Provisions to Project-Record Type	New topic. A new feature for this release.
	Configuring Columns in the Template Selection Page in Lightning	New topic. A new feature for this release.
	Configuring the Availability of the Upload Signed Document Button	New topic. A new feature for this release.

Document	Topic	Description
	Prerequisites	Modified topic. Added details about: • Configuring email templates for intelligent import • Order of configuring IDE objects
	Online Contract Collaboration	New section. A new feature for this release.
	Importing Supporting Document	New topic. A new feature for this release.
	Merging Documents in Lightning	New topic. A new feature for this release.
	Generating an Agreement	Modified topic. Added details about Document Type.
	Importing an Offline Agreement	Modified topic. Added details about: • Document Type • Agreement status
	Creating an Offline Agreement	Modified topic. Added details about: • Document Type • Agreement status
	Storing an Executed Agreement	Modified topic. Added details about Document Type.
	Finalizing an Agreement	Modified topic. Added details about Document Type.
	Running Wizards in Lightning	Modified topic. Added details about Document Type.

Document	Topic	Description
	Reviewing an Agreement Created by Intelligent Import	Modified topic. Added details about enhancements to: • Document viewer • Agreement status
	Uploading Signed Documents	Modified topic. Added details about: • Version update after uploading the signed document • Intelligently importing signed documents
	Activating an Agreement	Modified topic. Added details about restrictions on deleting executed documents.
	Sending an Agreement Document for Parallel Review	Modified topic. Added the details about: • Email notification after canceling review • Ending a parallel review without document • Restriction for parallel review
	Subscribing to Document Lock Release Notification	New topic. Added the details about *subscribeToDocumentLock* API.
	Merging Documents	New topic. Added the details about the *mergeDocuments* API.
	Sending a Document for Signatures	New topic. Added the details about the *sendForSignature* API.
	Integrating Conga CLM with External Systems	A new topic for external integrations using the *Conga CLM* SOAP API.

Document	Topic	Description
	Activating Agreements	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Publishing Document Outside of Salesforce	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Publishing the Document to Chatter	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Publishing the Document to Files and Attachments	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Selecting a Template for the Agreement Document	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Terminating Agreements	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Updating Smart Fields	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Adding Header and Footer Text with Document Protection	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Adding Header and Footer Text without Document Protection	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Applying Security Parameters to a PDF	Updated topic to include API signature and SOAP Response/ Request XML for API integration.

Document	Topic	Description
	Converting a Word Document into a given output format	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Converting a Word Document into a PDF	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Converting a Word Document into a PDF for Standard Objects	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Enabling Authoring for Agreement Documents	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Document	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Document for a Standard Object	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Document on Submit Request	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Document on Submit Request for a Standard Object	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Supporting Document	Updated topic to include API signature and SOAP Response/Request XML for API integration.
	Generating a Supporting Document on Submit Request	Updated topic to include API signature and SOAP Response/Request XML for API integration.

Document	Topic	Description
	Merging Multiple Documents to a PDF with PDF Protection	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Merging Multiple Documents to a PDF without PDF Protection	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Creating PDF	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Merging Proposal Documents into a single PDF Document	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Package Multiple Documents	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Initiating Parallel Review	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Ending Parallel Review	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Getting Word Document Information for Parent with Files	Updated topic to include API signature and SOAP Response/ Request XML for API integration.
	Agreement Web Service	Updated topic to include namespace information for Contract Management Web Services.

Document	Topic	Description
	Merge Web Service	Updated topic to include namespace information for Contract Management Web Services.
	Author Web Service	Updated topic to include namespace information for Contract Management Web Services.

Spring '20

Document	Topic	Description
Spring 2020 (Rev E)	Assigning Custom Permissions to User Profiles	New topic.
	Admin Entries	Modified topic. Added the following admin entries: • APTS_ProfilePermissions • APTS_DoNotCopyOpportunityToAdobeAgreement.
Spring 2020 (Rev D)	Configuring Email Service for Ending Review by Email	Updated configuration steps.
Spring 2020 (Rev C)	PDF Security for Agreement Documents	Modified topic. Added PDF security details when the document is checked-in from X-Author Contracts.
	Admin Entries	Modified topic. Added APTS_ComplyConfig .
	Intelligently Importing Large Files in Lightning	Modified topic. Added details about storing executed documents.

Document	Topic	Description
Spring 2020 (Rev B)	Installing Contract Management	Minor updates to this topic.
	Configuring Wizard as a Related Tab	New topic.
	Supported File Size	New topic.
	Creating Steps from the Wizard Designer	Modified topic. Added information about the two-column layout.
	Configuring Two Column Layout	New topic. A new feature for this release.
	Running Wizards in Lightning	Modified topic. Added a prerequisite about configuring Wizard as a Related Tab.
	Uploading Signed Documents in Lightning	Modified topic. Added a note for Document Version Support for Signed Documents.
	Finalizing an Agreement	Modified topic. Added a note for Document Version Support for Signed Documents.
Spring 2020 (Rev A)	Configuring Intelligent Import Settings	Modified topic. Added the information that the Kira setting name is case sensitive.
	Comply System Properties	Modified topic. Added URL for the XAJS Endpoint property.
	Supported File Size	New topic.
Spring 2020	Setting Up Salesforce and Kira Single Sign-on	New topic. A new feature for this release.
	Creating Steps from the Wizard Designer	Modified topic. Added information regarding the two-column layout.

Document	Topic	Description
	Providing Access to Run Wizards	New topic. Added missing information.
	Adding Wizard Launcher Tab in Lightning	New topic. A new feature for this release.
	Installing Conga CLM	Modified topic. Added a prerequisite about Apttus Base Library.
	Upgrading Conga CLM	New topic. Added information about how to upgrade Contract Management.
	Translating X-Author Contracts User Interface	New topic. A new feature for this release.
	Use Case: Translating X-Author Contracts User Interface	New topic. A new feature for this release.
	Setting Up Lite User License	New topic. A new feature for this release.
	Configuring Intelligent Import Fields	New topic. Added missing topic.
	Comply System Properties	Added the following comply system properties: • CLM Lite License Profile(s) • CLM Lite License Admin Email • Email Lite Monitoring Report to Apttus? • Inactivate Non-Compliant Lite User • Ancestor Selection For Import Offline • Asynchronous Checkin Recipient • Auto Enable Asynchronous Checkin • XAJS End Point

Document	Topic	Description
	Configuring Intelligent Discovery Settings	Updated navigation per Lightning UI. Added details about retrieveHighlightedDocument and DeleteDocumentFromKira.
	Mapping Provisions to Project-Record Type	Updated navigation per Lightning UI
	Uploading Signed Documents	New topic. A new feature for this release.
	Clause Versioning	Modified topic. Added a table for clause status after each agreement action.
	Intelligently Importing Large Files in Lightning	New topic. A new feature for this release.
	Reviewing an Agreement Created by Intelligent Discovery in Classic	Modified topic. Add details regarding date and currency fields,
	Running Wizards in Lightning	New topic. A new feature for this release.
	Package Multiple Documents	Modified topic. Added the following parameters: • RetainInputHeaderFooter • CumulativePageNumber

Winter '19

Document	Topic	Description
Winter 2019	Admin Objects	Modified topic. Added the following admin objects: • APTS_AccountHierarchyFields • APTS_DocumentSearchBasicFilter • APTS_InEffectViewMetadataFields
	Contract Management with Salesforce Lightning	Modified topic. Added content for Salesforce Lightning Console support.
	Comply System Properties	Modified topic. Added Override Playbook default filter comply system property.
	Adding Custom Locale	New topic. A new feature for this release.
	Configuring MS Teams Setting	New topic. A new feature for this release.
	Adding Agreement Hierarchy Button for Accounts	New topic. A new feature for this release.
	Adding Agreement Hierarchy Button	New topic. A new feature for this release.
	Adding In-Effect View Button	New topic. A new feature for this release.
	Configuration to Email Multiple Agreement Documents in Lightning	New topic. A new feature for this release.
	Agreement Fields	Modified topic. Added Executed Date field details.
	Configuring APTS_ComplyConfig	Modified topic. Added new cloning specifications for Renew, Amend, and Clone.

Document	Topic	Description
	Sending an Agreement Document for Parallel Review	Modified topic. Added a prerequisite for tracking review status from X-Author Contracts.
	Sending an Agreement Document for Microsoft Teams Review	New topic. A new feature for this release.
	Emailing Multiple Agreement Documents	Modified topic. Added a note for the recommended maximum file size.
	Searching Agreement Documents	Modified topic. Added new Basic Search filters.
	Agreement Fields	Modified topic. Added new field details.
	Generating an Agreement	Modified topic. Added content for changes in agreement clauses status.
	Reviewing an Agreement Created by Intelligent Import	Modified topic. Added content for changes in agreement clauses status.
	Finalizing an Agreement	Modified topic. Added content for changes in agreement clauses status.
	Contract Management with Salesforce Lightning	Modified topic. Added content for Salesforce Lightning Console support.
	Accessing In-Effect View	New topic. A new feature for this release.
	Activating an Agreement	Modified topic. Added a restriction for activating an agreement.
	Clause Versioning	New topic. A new feature for this release.
	Merging Multiple Documents to a PDF	Modified topic.
	Terminating Agreements	New topic.

Summer '19

Document	Topic	Description
Summer 2019 (Rev A)	Managing Agreement Lifecycle Post-Activation	Modified topic.
Summer 2019	Configuring Agreement Hierarchy Page Header	New topic.
	Custom Permissions	Modified topic.
	Comply System Properties	Modified topic.
	Configuring Email Service for Ending Review by Email	New topic.
	Admin Objects	Modified topic.
	Viewing Agreement Hierarchy	New topic.
	Searching Agreement Documents	New topic.
	Sending an Agreement Document for Parallel Review	New topic.
	Finalizing an Agreement	Modified topic.
	Initiate Parallel Review	New topic.
	End Parallel Review	New topic.

Spring '19

Document	Topic	Description
Spring 2019	Scheduling Expiration Date for Email Downloadable Link	Added a new topic for scheduling the expiration date for email downloadable link

Document	Topic	Description
	Admin Objects	Added the following admin objects: • APTS_RecordTypeUpdateOnAmend • APTS_EnableValidationForEmailWithoutUserContact
	Comply System Properties	Added the Allow Regenerate From XAC comply system property
	Managing Offline Agreements	Updated the topic with uploading offline documents in any file format
	Reviewing an Agreement Created by Intelligent Import	Updated the topic with: • Sending highlighted or unhighlighted documents for review • Details on the OCR Quality field on the Document Viewer • Information on Review Offline Document Status Popup • Adding a clause when reviewing an offline document
	Emailing Multiple Agreement Documents	Added a new topic for sending a downloadable link for downloading multiple documents.
	Callback Classes	Added Contract Management callback classes.

Winter '18

Document	Topic	Description
Winter 2018	Managing Offline Agreements	Added new section for intelligent data extraction feature
	Configuring APTS_ComplyConfig	Updated topic with how to configure separate clone specifications for each record type

Document	Topic	Description
	Defining Naming Convention for Different Record Types	Added a new topic for defining the naming convention for different record types feature
	Working with Offline Agreements	Added a new section for the intelligent data extraction feature.

Summer '18

Document	Topic	Description
Summer 2018	Adding and Defining Action Panel	New topic. New feature for this release.
	Admin Objects	Updated the topic with the new admin object APTS_CustomLinksforActionPanel.
	Comply System Properties	Updated the topic with the new system property Unlock Smart Elements.
	Creating an Agreement	Updated the topic with information on the action panel in classic mode for community portals.

CLM for Administrators

This section describes how Conga Contract Lifecycle Management (Conga CLM) works and how to manage your organization's and your customers' contracts.

Topic	Description
What's Covered	This section is designed to provide administrators, involved with the contracting process in your organization, with information on configuring and setting up Conga CLM. This section covers the most common use cases for the Conga CLM Administration and assumes a level of familiarity with basic Salesforce. See Salesforce documentation for details on standard Salesforce functionality.
Primary Audience	Conga CLM Administrator, Contract Manager, Legal Team, Contracts Administrator, Template Administrator, Template Designer
IT Environment	Refer to the latest Conga CLM Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CLM Documentation topic.
Other Resources	Refer to the X-Author for Contracts documentation for detailed instructions on setting up templates and editing agreement documents.

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

- Basic Salesforce administration
- Salesforce and Conga CLM terms and definitions

Select one of the following topics for more information:

- Setting Up Conga CLM
- Configuring the CLM User Interface
- User Profile Management
- Application Management Settings
- Managing Templates
- Agreement Lifecycle Management
- Versioning Contract Documents
- Managing Workflow

Setting Up Conga CLM

Select one of the following topics for more information:

Pre-installation Settings

Before you install Conga CLM package, you must enable Salesforce CRM content in your organization.

To enable Salesforce CRM content

Conga CLM 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 Conga CLM package because it impacts migration.

1. Login to Salesforce.com.
2. Go to **Setup** > **Customize** > **Salesforce Files** > **Settings** > **Salesforce CRM Content** and click **Edit**.
3. Select the **Enable Salesforce CRM Content** checkbox.
4. Click **Save**. Salesforce CRM Content is enabled.
   You can now install the Contract Management package.

Installing Conga CLM

You can install Conga CLM from the Customer Success Portal.

> ⓘ If you are installing CLM for the first time, you can see the new logo and icons that are part of rebranding from Apttus to Conga.

> ✅ The Conga Upgrade Program is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see Registering for Conga Upgrade Program.

Install the packages in the following order:

Order	Package	Required?
1	Conga Base Library	Yes
2	Conga Contract Management	Yes
3	Conga Content Integration	Yes
Install the following packages if you use Adobe Sign:		
4	Adobe Sign	Yes, if you are using Adobe Sign.
5	Conga Contract EchoSign Integration	Yes, if you are using Adobe Sign.
Install the following packages if you use DocuSign:		
4	Conga DocuSign API	Yes, if you are using DocuSign.
5	Conga Contract DocuSign Integration	Yes, if you are using DocuSign.

To install Conga CLM packages

You must have login credentials.

1. Go to the **Resources** > **Install Center** tab on the Community Portal.

2. In **My Packages** navigation window, you can see Conga Contract Lifecycle
   Management. Click the Details link to access the VERSION drop-down and select the
   version that you want to install.
3. Click **Install Version.**
4. Select the environment in which you want to install the packages.
   - Click **Install in Production** to install the packages in your production org.
   - Click **Install in Sandbox** to install the packages in your sandbox org.
5. In the Salesforce login screen, enter your login credentials and click **Log In**.
6. Enter the **Password** provided.
7. Select the profile for which you want to install the package. You are recommended to
   select **Install for All Users**.
8. To Install for Specific Profiles, you must define the access level for all profiles. Select
   from one of the following options.
   - No Access - This is the default setting. Apply this access level to disable all
     object permissions.
   - Full Access - Apply this access level to assign users permissions to Read, Create,
     Edit, Delete, View All, and Modify All for all objects.
9. Click **Set**.
10. Click **Install**.

A message is displayed indicating the installation is underway. Once installed, repeat this
procedure for each of the packages.

> ⓘ While installing a Conga package, if you see an "Approve Third-Party Access"
> prompt, select the **Yes, grant access to these third-party web sites** check box and
> click **Continue**.

Conga CLM is successfully installed in your selected environment. Complete the post-
installation settings.

Registering for Conga Upgrade Program

You can register your org for Conga Upgrade Program to auto-upgrade Conga managed
packages. Conga Upgrade Program supports upgrading from the Spring '18 release or later
to the latest major release (*n*) or previous two major releases (*n* – 1 or *n* – 2).

To register your org with Conga Upgrade Program for auto-upgrade

This section provides a high-level flow of the org registration process and early feedback programs. Refer to *Conga Upgrade Program documentation* for a comprehensive overview of features.

1. Launch the Conga Upgrade Program's registration page.
2. Select your Salesforce org type (**Production** or **Sandbox**). The Salesforce login page is displayed.
3. Enter your credentials and click **Login**. You are redirected to the connected app called **Conga Push Upgrade CA**, which prompts you to allow access to the org information.
4. Click **Allow**. The org registration form is displayed.
5. Click **Set Package Access Control** to set the accessibility for Conga packages to be upgraded with Conga Upgrade Program.
6. Click **Submit**.
   The **Early Feedback** pop-up is displayed. In addition, Conga sends an email notification to the system administrator on successful registration with a list of packages (including dependent packages, if any) handled in the upgrade process.

   > ⚠ The early feedback program executes a test suite to check if the customizations in your org are compatible with the upgrade. For more information, see the Conga Automation Early Feedback program.

7. Click **Try Now**. A **Conga Automation Dashboard** is displayed with a **Quick Guide** pop-up. Click **Yes** to go through the quick tour of the dashboard.
8. Click **Click to see the test t**o view a list of tests to be executed for your org, A **List of Tests** pop-up is displayed.
9. Enter your Email ID and Organization Name. You can enter multiple email ids.
10. Click **Trigger Welcome Email**. Conga sends a welcome email to the email ids entered in the previous step with a list of tests performed in the early feedback program.
11. Click **Proceed**. A **Conga Services Test Automation Execution Page** is displayed.
12. Click the checkbox next to the Job ID and click **Begin Test Execution** to run the predefined automated test suite against your org.

For the latest information on Conga Upgrade Program, see Conga Upgrade Program documentation.

Post-installation Settings

After installing Conga CLM, configure admin settings and system properties to meet the business objectives of your implementation.

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

If there are any issues with your installation, verify all of the objects were installed as expected. If you have too many agreement records, you can index the agreement number.

Creating or Verifying Administration Entries

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

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

To create or verify admin entries

1. Click + and click **Admin.** All the out-of-the-box Admin entries are displayed on the Admin home page. Based on your organizations' requirement, you may want to add or create new Admin entries.
2. To create a 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 Comply System Properties custom setting, create a dataset named System Properties.

To customize the comply system properties settings

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

You have customized the comply system properties settings.

Verifying Conga CLM Package Objects

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

1. Go to **Setup > Create > Objects.**
2. Verify that the Conga CLM 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.
- **Custom Fields**
  - For example, External ID, Unique.

Upgrading Conga CLM

This section provides information on upgrading Conga CLM to the latest version from the previous two releases.

> ⓘ Regardless of your current Conga CLM version, you can upgrade to the latest version. If you have not installed Conga CLM, you can contact Support to request an installation link, then perform the standard installation as described in Installing Conga CLM.

> ✅ The Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see Registering for Conga Push Upgrade.

Preparing for Upgrade

Before you upgrade to Conga CLM June '23, you must ensure the following:

- You go through Conga CLM on Salesforce Feature by Release to know about the new features, enhancements, and deprecated features in Conga CLM since your existing release. After you upgrade Conga CLM to June '23, you cannot roll back to any previous release.
- You have System Requirements and Supported Platforms.
- You have access to the **Install Center** on the Community Portal.
- You have administrator privileges to your Salesforce org.
- It is recommended that you back up all your configurations.

Upgrading to Conga CLM June '23

This section describes step-by-step instructions to upgrade from September '22 and February '23to June '23.

Upgrading Conga CLM from February '23 to June '23

1. Go to **Setup** > **Installed Packages** and ensure that your current Salesforce org has the following February '23 packages installed. Also, ensure that you have the following packages and dependent packages to upgrade to June '23. These packages are required to utilize the new features and enhancements of June '23.

Order	Product	February '23 Upgrade Version (Name | Number)	June '23 Upgrade Version (Name | Number)
1	Conga Base Library	4.0.243 | 4.243	4.1.245 | 4.245
2	Conga Contract Lifecycle Management	14.0.696 | 14.696	14.1.709 | 14.709
3	Conga Content Integration	8.1.0020 | 8.20	8.1.0020 | 8.20
Upgrade the following packages if you use DocuSign:			
4	Conga DocuSign API	8.1.142 | 8.142.2	8.1.142 | 8.142.2
5	Conga Contract DocuSign Integration	5.1.50 | 5.5	5.1.50 | 5.5
Upgrade the following packages if you use Adobe Sign:			
4	Adobe Sign	24.2 | 24.2	24.2 | 24.2
5	Conga Contract EchoSign Integration	10.1.73 | 10.73	10.1.73 | 10.73
6	CongaSign CLM Integration	1.2.6 | 1.6	1.2.6 | 1.6

2. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing Conga CLM managed packages, see Installing Conga CLM.

Upgrading Conga CLM from September '22 to June '23

1. Go to **Setup** > **Installed Packages** and ensure that your current Salesforce org has the following September '22 packages installed. Also, ensure that you have the following packages and dependent packages to upgrade to June '23. These packages are required to utilize the new features and enhancements of June '23.

Order	Product	September '22 Upgrade Version (Name | Number)	June '23 Upgrade Version (Name | Number)
1	Conga Base Library	3.1.238 | 3.238	4.1.245 | 4.245
2	Conga Contract Lifecycle Management	13.1.683 | 13.683	14.1.709 | 14.709
3	Conga Content Integration	8.1.0020 | 8.20	8.1.0020 | 8.20
Upgrade the following packages if you use DocuSign:			
4	Conga DocuSign API	8.1.142 | 8.142.2	8.1.142 | 8.142.2
5	Conga Contract DocuSign Integration	5.1.50 | 5.5	5.1.50 | 5.5
Upgrade the following packages if you use Adobe Sign:			
4	Adobe Sign	24.2 | 24.2	24.2 | 24.2
5	Conga Contract EchoSign Integration	10.1.73 | 10.73	10.1.73 | 10.73
6	CongaSign CLM Integration	1.2.6 | 1.6	1.2.6 | 1.6

2. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing Conga CLM managed packages, see Installing Conga CLM.

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

Conga Contract Management package must have been installed. You must have Conga provided login credentials.

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

You are successfully logged in to Conga Contract Management. Navigate to the **Salesforce.com App Menu**, select **Conga Contract Management** to access the Contract Management tabs. Navigate to the **Opportunities** or **Accounts** tab.

Configuring the CLM User Interface

Select one of the following topics for more information:

- Creating a Page Layout
- Creating a Record Type
- Configuring a Custom Link for Opportunity
- Configuring Custom Links on the Home Page
- Customizing Agreement Actions
- Adding Agreement Hierarchy Button
- Adding In-Effect View Button
- Adding the Email Agreement(s) Document(s) Button in Classic
- Configuring Agreement Hierarchy Page Header
- Configuring the Availability of Custom Buttons
- Adding Agreement Hierarchy Button for Accounts
- Configuring Documents Tab in Lightning

- Configuring Document Action Column in Classic
- Hiding Contracts and Templates Tabs in X-Author Contracts for Cloud
- Translatable Customizations
- Translating X-Author Contracts User Interface
- Removing the Path Field
- Configuring In-Effect View Page Header
- Configuring New Agreement Form Fields
- Populating the File Size Field
- Setting Up Quick Search on the Home Page

Creating a Page Layout

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

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

Creating a Record Type

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

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

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

Creating an Agreement Record Type

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

To Create Agreement Record Types

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

2. Click **Agreement** under the Label column to edit the custom Agreement object. The custom object definition details are displayed.

3. Scroll down to the Record Types objects. To create a new record type, click **New.**

4. Select **Master** from the Existing Record Type drop-down list to copy all available picklist values, or select an existing record type to clone its picklist values.

5. Enter a unique Record Type Label.

6. Enter a Record Type Name. The Record Type Name refers to the component when using the Web services API and prevents naming conflicts on package installation in managed packages.

7. Enter a description.

8. Select **Active** to activate the record type.

9. Select **Enable for Profile** next to a profile to make the record type available to users with that profile. Select the check box in the header row to enable it for all profiles. If each profile is associated with a single record type, you will not be prompted to select a record type when creating new records.

10. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the check box in the header row to make it the default for all profiles.

11. Click **Next.**

12. Choose a page layout option to determine what page layout displays for records with this record type:
    - To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the drop-down list.
    - To apply different page layouts based on user profiles, select **Apply a different layout** for each profile and choose a page layout for each profile.

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

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

Configuring a Custom Link for Opportunity

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

To set up Opportunity links

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

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

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

Configuring Custom Links on the Home Page

Setting up Home page links allows quick and easy access to common functions of the applications from the Home page. The following steps are involved to set up a home page.

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

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

Creating a New Agreement Component

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

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

Creating a New Home Page Layout

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

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

Assigning a New Layout to an Appropriate User Profile

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

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

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.

Adding Agreement Hierarchy Button

You need to add the Agreement Hierarchy button on the Agreement Detail page to view the agreement hierarchy.

To add the Agreement Hierarchy button

1. Go to **Setup** > **Build > Create > Objects**.
2. In the Custom Objects page, click the **Agreement** hyperlink.
3. Navigate to the Page Layouts section and click the **Edit** hyperlink for Agreement Layout.
4. From the Buttons category in the palette, drag Agreement Hierarchy (New) into the Custom Buttons section of the Agreement Detail.
5. Click **Save**.

Adding In-Effect View Button

You need to add the In-Effect View button on the Agreement Detail page to view the In-Effect agreement details.

To add the In-Effect View button

1. Go to **Setup** > **Build > Create > Objects**.
2. In the Custom Objects page, click the **Agreement** hyperlink.
3. Navigate to the Page Layouts section and click the **Edit** hyperlink for Agreement Layout.
4. From the Buttons category in the palette, drag In-Effect View into the Custom Buttons section of the Agreement Detail.
5. Click **Save**.

Adding the Email Agreement(s) Document(s) Button in Classic

You can configure the Email Agreement(s) Document(s) button in Classic to email multiple documents of multiple agreements to selected contacts or to a user group.

To configure the Email Agreement(s) Document(s) button

1. Go to **Setup > Build > Create > Objects > Agreement**
2. Under the Search Layouts section, click the **Edit** link before the Agreements List View layout.
   This displays the Edit Search Layout page.
3. Under the Custom Buttons section, in the Available Buttons column, select Email Agreement(s) Document(s).
4. Click the Add ▶ icon.
   This displays Email Agreement(s) Document(s) in the Selected Buttons column.
5. Click **Save**.
   This adds the Email Agreement(s) Document(s) button on the Agreements List page.

Configuring Agreement Hierarchy Page Header

You can configure the fields that are displayed in the header section of the Agreement Hierarchy page.

To configure fields on the Agreement Hierarchy page

1. Go to **Setup** > **Create** > **Objects**.
2. Click **Agreement**.
3. Navigate to *Field Sets* section.
4. Click the **Edit** link before Agreement Hierarchy Fields.
5. Drag and drop fields into the *In the Field Set* section.
6. Navigate to the Agreement Hierarchy page to view the configured fields.

Configuring the Availability of Custom Buttons

In this topic, the configuration Upload Signed Document custom button is considered as an example. You can follow the same steps to configure other custom buttons.

By default, users can view the Upload Signed Document button after sending a document for signatures (manual or wet signatures). You can also make the Upload Signed Documents buttons available for different Statuses and Status Categories of agreements. If you configure a custom field, the configuration in the field is given priority over the default configuration.

To configure the availability of the upload signed document button

1. Navigate to **Object Manager** > **Agreement** > **Fields & Relationships**.
2. Click **New**.
3. Select Data Type as **Formula** and click **Next**.
4. Enter the Field Name as *UploadSignedDocument_Custom2* and enter Field Label as *Upload Signed Document Custom*.
5. Select Formula Return Type as **Text** and Click **Next**.
6. In the Upload Signed Document (Text) field, enter the formula and click **Next**.

Sample

```
IF(AND( ISPICKVAL(Apttus__Status_Category__c,"Request"),
(ISPICKVAL(Apttus__Status__c,"Request") ) ), IF (OR ($User.UIThemeDisplayed ==
'Theme4d', $User.UIThemeDisplayed == 'Theme4t', $User.UIThemeDisplayed ==
'Theme4u') , HYPERLINK("/apex/Apttus__LightningOfflineDocumentImport?
action=UploadSignedDocument&id=" &Id, IMAGE("/resource/
Apttus__Button_UploadSignedDocument", "Upload Signed Document"),"_self" ) ,
HYPERLINK("/apex/Apttus__OfflineDocumentImport?action=UploadSignedDocument&id="
 &Id, IMAGE("/resource/Apttus__Button_UploadSignedDocument", "Upload Signed
Document"),"_self") ) ,NULL)
```

7. According to your requirement, set Field-Level Security for Profile and click **Next**.
8. Select the page layouts that should include the Upload Signed Document field and click **Save**.

Adding Agreement Hierarchy Button for Accounts

You need to add the Agreement Hierarchy button on the Account Detail page to view the agreement hierarchy.

To add the Agreement Hierarchy button for Accounts

1. Go to **Setup** > **Accounts** > **Buttons, Links, and Actions**.
2. Click **New**.
3. Enter the following details:
    a. **Label**: Agreement Hierarchy.
    b. **Name**: Agreement_Hierarchy.
    c. **Display Type**: Detail Page Button.
    d. **Behavior**: Display in existing window with sidebar.
    e. **Content Source**: Visualforce Page.
    f. **Content**: AgreementHierarchyByAccount [Apttus__AgreementHierarchyByAccount].
4. Click **Save**.
5. Go to **Setup** > **Build** > **Customize** > **Accounts** > **Page Layouts**.
6. Click the **Edit** hyperlink for Account Layout.
7. From the Buttons category in the palette, drag Agreement Hierarchy into the Custom Buttons section of the Account Detail.
8. Click **Save**.

Configuring Documents Tab in Lightning

You need to configure the Documents tab in Lightning to view the documents. You can enable or disable the Delete button on the Documents tab for selected user profiles to prevent the deletion of documents.

Prerequisites

You must configure the registration setting to allow users to configure columns on the Documents tab. For more information, see Generating Registration Setting.

To configure the Documents tab

1. Navigate to the Agreement Detail page.
2. Click the **Setup** icon and select the **Edit Object** option.
   This displays the Agreement Object page.

   > ⓘ If you want to permit users to use Online Contract Collaboration only for certain record types, you need to perform the following tasks:
   >   a. Navigate to an agreement that contains the desired record type.
   >   b. Click the **Setup** icon and select the **Edit Page** option.
   >   c. Follow the steps mentioned below from 3 to 13.

3. Click **Lightning Record Pages** > **Agreement Record Page**.
   This displays the Lightning Page Detail page.
4. Click **Edit**.
   This displays the Agreement Record page.
5. In the layout, click the **Details** tab.
   This displays a tabs component in the right panel.
6. Click the **Add Tab** button.
   This adds another Details tab in the layout.
7. In the tabs component, select the newly added Details tab.
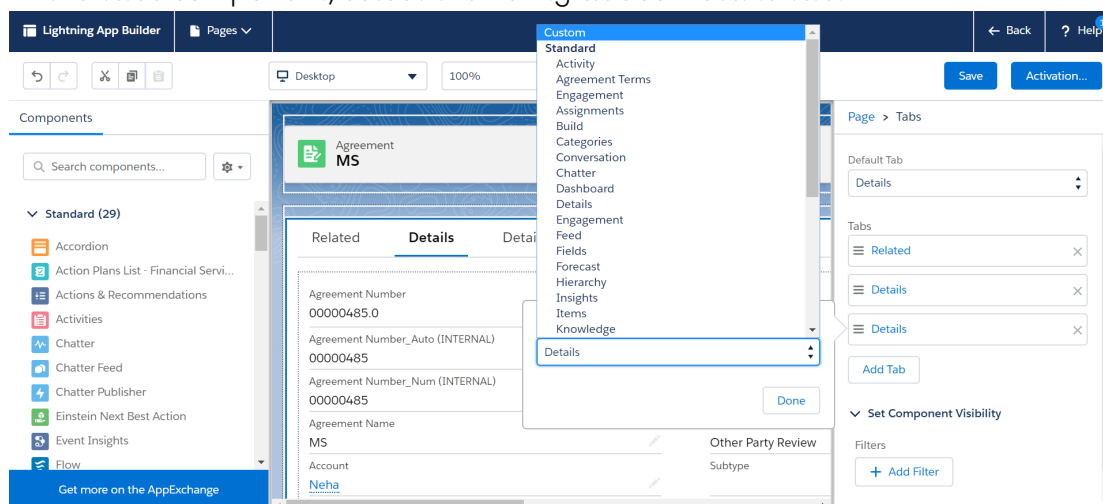
8. From the Tab Label, select **Custom**.
   This displays the Custom Label text field.
9. In the Custom Label field, enter **Documents**.
10. In the layout click the **Documents** tab.
11. In the left panel, search for **Agreement Documents**.

12. Drag **Agreement Documents** from the left panel and drop in the Add Component(s) here section.
    This displays all the documents available in the agreement.
13. Click **Save**.
    If you are configuring the page layout for the first time in your org, then you need to activate the page.

To disable the Delete button on the Documents tab

1. Go to **Setup** > **Users** > **Profiles**.
2. Select a user profile.
3. Click **Object Settings** and then click **Document Version**.
4. Under the Object Permissions section, unselect the Delete checkbox.
   All the users assigned to the selected user profile cannot see the Delete button on the Documents tab.

Configuring Document Action Column in Classic

You need to configure the Document Action column to open the Online Contract Collaboration view in classic.

To configure the Document Action column

1. Go to **Setup** > **Build** > **Create** > **Objects** > **Document Version Detail**.
2. In the Document Version Detail, click the **Edit** Action in the Page Layout section.
   This displays the Document Version Detail Layout page.
3. In the Related Lists section for Version Details, click the wrench icon (🔧).
   This displays the Related List Properties - Version Details popup.
4. In the Available Fields column, select and add the **Document Action** column.
5. Click **Ok** and click **Save**.
   The Document Action column is added in the Document Version Detail page.

Hiding Contracts and Templates Tabs in X-Author Contracts for Cloud

This feature allows you to hide contracts or templates tab in X-Author Contracts using custom permissions.

Prerequisites

Refer Salesforce documentation to understand how to create custom permissions.

To Hide Contracts or Templates Tab:

1. Create XA_Template and XA_Contracts custom permissions in the Contract Management application.
2. Navigate to **Setup**>**Manage Users**>**Profiles**.
3. Click a profile name to hide the Contracts or Template tab for that profile. This displays the Profile Overview page.
4. In the Apps section, click **Custom Permissions**. This displays the Custom Permissions page.
5. Click **Edit**.
   When the XA_Template and XA_Contracts custom permissions are in Available Customer Permissions section, the user will not be able to view Template and Contracts tabs in the X-Author Contracts for Cloud. When the XA_Template and XA_Contracts custom permissions are in Enabled Customer Permissions section, the user will be able to view Template and Contracts tabs in the X-Author Contracts for Cloud.
6. Move the XA_Template or XA_Contracts custom permissions from Enabled Custom Permissions section to Available Custom Permission to hide Contracts or Templates tab.
7. Logout and log in each time after you disable or enable a custom permission.

> ⚠ When you login into the X-Author Contracts for Cloud:
> - If you have only XA_Template custom permission, you will only see the Templates tab.
> - If you have only XA_Contract custom permission, you will only see the Contracts tab.

> - If you have both XA_Template and XA_Contract custom permission, you will see both Templates tab and Contracts tab.
> - If you do not have both XA_Template and XA_Contract custom permission, you will get a message and will be logged out.

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

Translating X-Author Contracts User Interface

X-Author Contracts supports data translation to multiple languages. This allows you to use X-Author Contracts in your native language. You need to configure Contract Management to view X-Author Contracts in your native language. To view X-Author Contracts in your native language, you need to configure locale related settings in

Contract Management. You need to change the locale settings in Contract Management and translate labels of Visualforce pages that are used in X-Author Contracts. You also need to translate the XML resource file and upload it to the required locale. You can use default locales available in Contract Management or add a custom locale.

To change locale settings

1. Go to **Setup** > **My Personal Information** > **Edit your personal information** > **Edit**.
2. Navigate to the Locale Settings section and update the following fields according to your translation requirement.
    a. Time Zone
    b. Locale
    c. Language
    d. Currency
3. Click **Save**.
    You can now view all the Salesforce objects in the language you selected.

To set up language translation

1. Go to **Setup** > **Translation Workbench** > **Translation Language Settings**.
2. Click **Add**.
3. In the Language Translation Edit page, select a language from the Language dropdown.
4. To permit few users to edit translations, move those usernames from the Available List to Selected List.

> ⓘ **Note**
>
> Ensure that the language is active.

5. Click **Save**.
6. Go to **Setup** > **Develop** > **Visualforce Pages**.
7. Select a visualforce page.
8. In the Visualforce Markup section, search for the word Label and make a note of all the labels on the page.
9. Repeat the above step for all the following visualforce pages.

The labels in the following visualforce pages need to be translated as they are used in the X-Author Contracts:

- CreateTemplateSO
- UpdateTemplateSO

- CreateTemplateClauseSO
- UpdateTemplateClauseSO
- SelectTemplateForCheckout
- SelectTemplateForLoad
- SelectLibraryComponent
- SelectMergeField
- CreateMergeCondition
- CreateMergeDataSet
- CompareTemplateVersions
- BrowseAttachments
- CreateOfflineAgreement
- BrowseTemplates
- BrowseAgreements
- DocumentFinder
- AddProducts
- BrowseGroups
- BrowsePeople
- ChatterPage
- ChatterUserPage

To translate custom labels

1. Go to **Setup** > **Create** > **Custom Labels**.
2. Select one of the labels.
3. In the Custom Label Detail page, click **New Local Translations / Overrides**.
4. Select the localization language.
5. In the Translation field, enter the translation text for that label.
6. Click **Save**.

To translate custom fields

1. Go to **Setup** > **Translation Workbench** > **Translate**.
2. In the Select the filter criteria section, select the following options:
   a. **Language**: select localization language
   b. **Setup Component**: Custom Field
   c. **Object**: Agreement
   d. **Aspect**: Field Label

3. In the Field Label Translation column, double-click on the field space next to a field you need to translate available in the Master Field Label column.
4. Click **Save**.

To download the resource file

1. Navigate to the **Locale** tab.
2. Click the **English (United States)** hyperlink.
   This displays the Template Locale Detail page.
3. In the Files section, click the **Download** hyperlink.
   TheXAResource.resx file is downloaded to your system.
4. Open the file and translate the UI text into your local language.

> ⓘ **Note**
>
> Do not rename the XAResource.resx file (resource file).

To upload the updated resource file

1. Navigate to the Locale tab.
2. Click the <locale name> hyperlink.
   This displays the Template Locale Detail page.
3. In the Files section, click Upload Files and select the updated XAResource file from your system.
4. Click **Close** on the Upload to <locale name> window.
   When you open X-Author Contracts, you can view the UI in your local language.

> ⓘ **Note**
>
> If you need to update the resource file, ensure that you delete the existing resource file and upload the updated resource file. If no resource file is available for the locale you have selected in Salesforce, the default English (United States) is used to display the content in X-Author Contracts.

Use Case: Translating X-Author Contracts User Interface

This use case describes how to translate the X-Author Contracts user interface from English (United States) to Spanish. You might use this functionality differently, depending on your

localization language. For more information about the functionality, see Translating X-Author Contracts User Interface.

To translate the X-Author Contracts user interface to Spanish

1. Go to **Setup** > **My Personal Information** > **Edit your personal information** > **Edit**.
2. Navigate to the Locale Settings section and select the following options.

3. Click **Save**.
   You can now view all the Salesforce objects in the language you selected.
4. Go to **Setup** > **Translation Workbench** > **Translation Language Settings** and click **Add**.
5. In the Language Translation Edit page, select **Espanol** from the Language dropdown.
6. To permit few users to edit translations, move those user names from the Available List to Selected List.

7. Click **Save**.
8. Go to **Setup** > **Develop** > **Visualforce Pages**.
9. Click the **DocumentFinder** hyperlink.
10. Search for the word Label and make a note of the LoadingPage label.
    Only one label is considered in this demonstration. You need to configure all the labels for the visualforce pages mentioned in the Translating X-Author Contracts User

Interface.

11. Go to **Setup** > **Create** > **Custom Labels**.
12. Click the LoadingPage hyperlink.
13. In the Custom Label Detail page, click **New Local Translations / Overrides**.
14. Select the localization language and enter the translation text for the label.

    When a page loads in X-Author Contracts, the loading page label is displayed in Spanish.

15. Click **Save**.
16. Go to **Setup** > **Translation Workbench** > **Translate**.
17. In the Select the filter criteria section, select the following options:
18. In the Field Label Translation column, double-click on the field space next to a field you need to translate available in the Master Field Label column.

When you view agreement object fields in X-Author Contracts after translation, you can view the field names in Spanish.
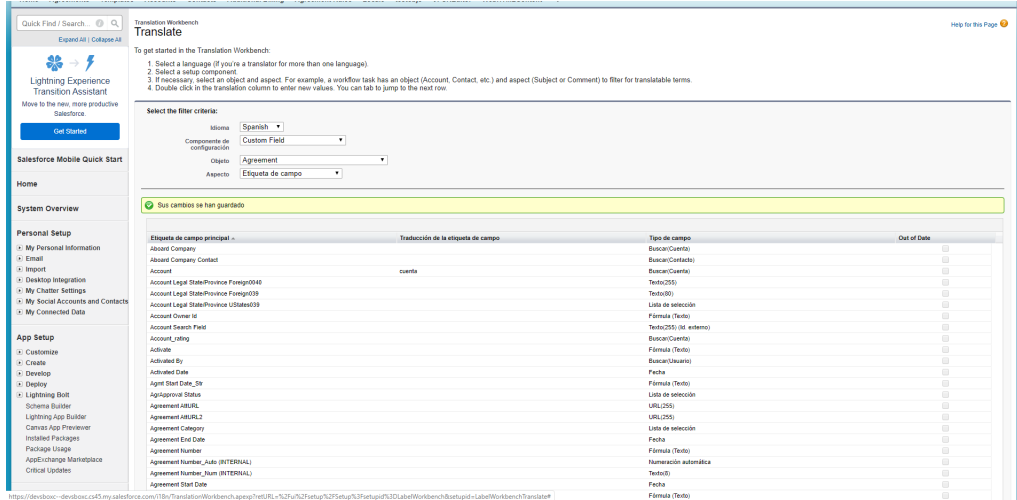
19. Click **Save**.

20. Navigate to the **Locale** tab.

21. Click the **English (United States)** hyperlink.

This displays the Template Locale Detail page.

22. In the Files section, click the **Download** hyperlink.

The XAResource.resx file is downloaded to your system.

23. Open the file and translate the UI text into your local language.

Before translation:

After translation:

24. Navigate to the Locale tab.

25. Click the **Spanish** hyperlink.

    This displays the Template Locale Detail page.

26. In the Files section, click **Upload Files** and select the updated XAResource.resx file from your system.

27. After the resource file is uploaded, click **Close** on the Upload to Spanish window.

    When you open X-Author Contracts, you can view the UI in Spanish.
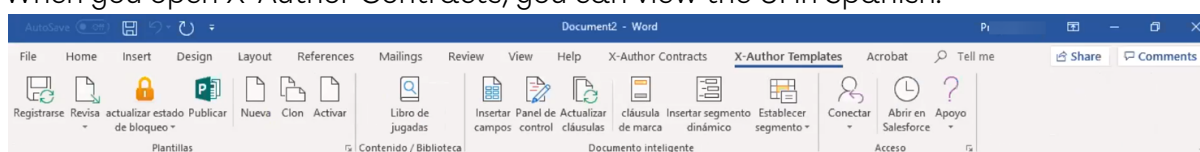
Removing the Path Field

You can remove the path field from the Agreement Document Detail page.

To remove the path field

1. Navigate to an Agreement Detail page.

2. Go to the Agreement Documents section.

3. Click the Name of an Agreement Document.

    This displays the Agreement Document Detail page.

4. Click the **Edit Layout** hyperlink.

    This displays the page layout.

5. In the Agreement Detail section, click the remove icon () next to the Path field.

6. Click **Save**.

    The Path field is now removed from the Agreement Document Detail page.

Configuring In-Effect View Page Header

You can configure the fields that are displayed in the header section of the In-Effect View page.

To configure fields on the In-Effect View page

1. Go to **Setup** > **Create** > **Objects**.
2. Click **Agreement**.
3. Navigate to *Field Sets* section.
4. Click the **Edit** link before Agreement In Effect Fields.
5. Drag and drop fields into the *In the Field Set* section.

   > ⓘ   You can add a maximum of 15 fields in the header. If you add more than 15 fields, you can encounter errors.

6. Navigate to the In-Effect View page to view the configured fields.

Configuring New Agreement Form Fields

When a user starts creating a new agreement, a new agreement form is displayed after you select a record type. This new agreement form is displayed only when the fields for the form are configured.

To configure fields on the new agreement form

1. Go to **Setup** > **Object Manager** > **Agreement** > **Field Sets** > **Agreement New Field Set**.
2. Drag the fields from the object palette and drop them into the In the Field Set container.
3. To make a field as required, double click the field or click the wrench icon (🔧) next to the field.
4. Select the Required checkbox and click **OK**.
5. Click **Save**.

Populating the File Size Field

To populate the File Size field for existing data, you must run the following script.

```
List<ApttusDocumentVersionDetailc> documentVersionDetails = [select id,
ApttusContentIdc from ApttusDocumentVersionDetailc where ApttusContentIdc != null AND
(ApttusFileSizec = 0 OR ApttusFileSize_c = null) limit 1];
if(documentVersionDetails.size() > 0) {
Apttus.DocumentFileSizeUpdateBatch documentFileSizeUpdateBatch = new
 Apttus.DocumentFileSizeUpdateBatch();
// Execute DocumentFileSizeUpdateBatch
Database.executeBatch(documentFileSizeUpdateBatch);
}
```

Setting Up Quick Search on the Home Page

To allow users to search content from the Home page, you can set up the quick smart search box on the home page in Lightning.

To configure the quick smart search box

1. Navigate to the Home page.
2. Click the **Setup** icon and select the **Edit Object** option.
3. In the Components search box, enter smartSearchHome and search.
4. Drag and drop the smartSearchHome component at any position on the Home page.
5. Click **Save**.

User Profile Management

This section covers the following topics:

- Managing User Profile
- Creating a User Profile
- Adding a Single User
- Assigning Conga CLM License to a User
- Assigning Users to Queues
- Providing Read Access
- Profile Settings and Security
- Setting Up Lite User License
- Folder Security and Sharing Permissions
- Assigning Custom Permissions to User Profiles

Managing User Profile

A profile contains user permissions and access settings. There are five basic profiles used with Conga CLM:

Profile Name	Available Permissions Description
Conga CLM Administrator	Can configure and customize the application. Has access to all Conga CLM 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 X-Author for Contracts 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 for Contracts. 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 X-Author for Contracts in a negotiator role.

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

- **CLM 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 • 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.

• **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 Conga CLM License to a User**
  In addition to Salesforce licensing, a user profile must be assigned to the Conga CLM license.
- **Assigning Users to Queues**
  Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.
- **Providing Read Access**
  This allows preview and generate agreement actions to read the document password from the Admin object without allowing them to view it. You can set the permissions and page layouts for the selected profile. The permissions defined here control access at the object level. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators.

Creating a User Profile

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

To create a user profile

You must have administrative privileges.

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

In addition to Salesforce licensing, a user profile must be assigned to the Conga CLM license.

To assign Conga CLM license to a user

Before you assign Conga CLM 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 Conga CLM license.

Assigning Users to Queues

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

To assign a user to a queue

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

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

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

Providing Read Access

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

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

To provide users unviewable read access

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

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

Profile Settings and Security

Use the following settings as a reference to ensure the profile settings correspond to the custom profile. According to your organization's needs, you can change the settings.

See also Sharing Security.

> ⓘ Conga CLM recommends checking **field-level security** for corresponding objects when configuring profiles.

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administr ator
Custom App Settings					
Apttus Contract Management	Yes	Yes	Yes	Yes	Yes
Enabled Apex Class Access					
Apttus.*	Yes	Yes	Yes	Yes	Yes
Enabled Visualforce Page Access					
Apttus.*	Yes	Yes	Yes	Yes	Yes
Standard Tab Settings					
Accounts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Contacts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Dashboards	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Apttus Custom Tab Settings					
Admin	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Protection	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Rules	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreements	Tab Hidden	Default On	Default On	Default On	Default On
Agreement Document Output Formats	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Configurable Wizard	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Cycle Time Groups	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Doc Assembly Rulesets	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Query Templates	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Retention Policies	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Search Filters (Comply)	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default On

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Publish Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Purge Agreements	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default On
Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default On	Default On
Term Exceptions	Tab Hidden	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Administrative Permissions					
Manage Users	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Customize Application	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
View Setup & Configuration	Yes	Yes	Yes	Yes	Yes
Manage Public Reports	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Dashboards	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administr ator
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	Use Existing Setting	Use Existing Setting	Use Existing Setting	Yes	Yes
Send email	Use Existing Setting	Use Existing Setting	Yes	Yes	Yes
Folder Permissions					
See Folder Security					

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Custom Object Permissions					
Admin	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Clause	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document Output Format	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Line Item	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Lock	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Agreement Protection	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule Condition	Read	Read	Read	Read	Read, Create, Edit, Delete
Agreement Term Exception	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
AsyncMergeCall	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Content Event	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Clause Approval	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Cycle Time Field	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group Data	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Doc Assembly Component	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Rule	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Doc Assembly Ruleset	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
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
Locale	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

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Query Template Filter	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Query Template Qualifier	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Related Agreement	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Retention Policy	Read	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Search Filter (Comply)	Read	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Temp Object (Comply)	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Template	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Template Clause Reference	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Datasource Filter	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Dynamic Section	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Template Version	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

Profile	Read Only	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager/ Template Admin	Administrator
Wizard Ruleset	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Wizard	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create, Edit, Delete
Wizard Step	Read	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Custom Record Type Settings for Agreements					
Record Types (Create Permission) Permission for the Record Types needs to be provided.	No	Yes	Yes	Yes	Yes

Setting Up Lite User License

Lite user license is helpful when a user accesses Contract Management, occasionally, just to view or edit certain contracts. A Lite user can login to Contract Management up to 30 times. You can add a set of users to Apttus_Lite user profile that can log in to Contract Management up to 30 logins. You also track their usage by reviewing the usage monitoring report.

Prerequisites

You must configure the following Comply System Properties. For more information, see
Comply System Properties.

- CLM Lite License Profile(s)
- CLM Lite License Admin Email
- Email Lite Monitoring Report to Apttus?
- Inactivate Non-Compliant Lite User

When you configure the above-mentioned properties, the user login data (Login History Name, Login Time, and User) is captured in LoginHistory__c.

To set up Apttus_Lite user profile

1. Click **Setup > Users > Profiles**.
2. Click **New Profile**.
3. From **Existing Profile**, select an existing user profile to clone from.
4. For Profile Name, enter **Apttus_Lite_Users**.
5. Click **Save**.
6. Click **Assigned Users**.
7. If you need to create a single user, click **New User**.
   (or)
   If you need to create multiple users, click **Add Multiple Users**.
8. Enter the required details and click **Save**.

Lite License Usage Report

When you add a user to the Apttus_Lite user profile and the user creates or updates an agreement, the LoginHistoryScheduler and LiteUserReportScheduler jobs are automatically created. These jobs enable Lite User Usage Monitoring.

LoginHistoryScheduler: It cleans up the history of login data if it is older than 1 year and captures the login details in the loginHistory custom object. The job is scheduled to run daily at 6 AM (timezone dependent).

LiteUserReportScheduler: When a Lite user exceeds the allowable limit, this job sends the compliance report to the configured admins. The job is scheduled to run daily at 6:10 AM (timezone dependent).

The above-mentioned jobs ensure the following:

- If you assign a user to Apttus_Lite user profile, the user is tracked as a Lite User.

- The Lite License Compliance Report is sent to configured admins.
- Prevent non-compliant users from creating or updating an agreement record.

When the scheduled jobs are run, you will receive an email with the following details:

CLM Lite License Compliance Report

03/06/2020

Summary

Organization Name	ri.apttus.com.comply.dev	Organization ID	00D4T000000DmfpUAC
Start Date	03/07/2019	End Date	03/06/2020
Total CLM Lite Licenses	4	CLM Lite Profiles	Apttus_Lite_Users
Allowed Logins per year	30	# of Non-Compliant Users	1
Customer Admin Contact	a@apttus.com	Apttus License Admin Contact	in@apttus.com

CLM Lite License - Non-Compliant User List

Username	Period Start Date	Period End Date	# of Logins (Period)	# of Logins (Total)	Profile(s)
Sh	03/06/2020	03/06/2020	31	31	Apttus_Lite_Users

CLM Lite License - Approaching Allowable Limit User List

Username	Period Start Date	Period End Date	# of Logins (Period)	# of Logins (Total)	Profile(s)
Sh	03/06/2020	03/06/2020	25	25	Apttus_Lite_Users

CLM Lite License - Compliant User List

Username	Period Start Date	Period End Date	# of Logins (Period)	# of Logins (Total)	Profile(s)
A	03/06/2020	03/06/2020	0	0	Apttus_Lite_Users
R	03/06/2020	03/06/2020	0	0	Apttus_Lite_Users

Lite User License FAQs

This page lists the frequently asked questions and their answers.

If a lite user approves an agreement, will it be counted as a login?

If an entry is added in the login history table, it will be considered as a login.

When is the lite license start date?

When you add the first profile to the APTS_ lite custom system property.

Is a failed login attempt considered as a valid login?

No. A failed login attempt is not considered a valid login.

Folder Security and Sharing Permissions

This reference goes into more detail regarding typical permission settings for Folders used by Conga CLM 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 Conga CLM. 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	Administrator
Apttus Documents	Read	Read	Read	Read, Create, Edit, Delete
Apttus Images	Read	Read	Read	Read, Create, Edit, Delete
Apttus Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Apttus Temporary Email Templates	Read	Read	Read	Read, Create, Edit, Delete
Agreement Report	Read	Read	Read	Read, Create, Edit, Delete
Agreement Dashboard	Read	Read	Read	Read, Create, Edit, Delete

Content Repositories

Following activation of an agreement, documents designated for content search are routed to a content repository. The default content repository for Apttus agreement documents is the Documents folder, but you can also configure the system to route these documents to any of the following:

- Content Libraries
- Chatter Feed (File Feed data store)

See Routing Documents to Content Libraries for more information on setting up alternate content repositories for your activated agreement documents.

Email Folders

Email templates and temporary email templates with Agreement attachments are stored in the Apttus Email Templates and Apttus Temporary Email templates folders. If you have integrated electronic signature functionality into your Apttus solution, the respective custom objects store the request and response information which might contain the contract documents. Because of this, access should be restricted to specified users and user groups, and external portal users should be explicitly restricted from accessing these folders.

Sharing Security

Permissions associated with User Profiles are not always sufficient when determining access to specific records. Profile security is granted at the Object level. If a particular User Profile has Read/Edit permissions for an Object, by default they have the same permissions at the record level. Sharing security allows you to enforce permissions at the **Record** level.

Creating Your Private Sharing Model

The default Sharing setting (controlled by Organization-Wide Defaults) is always Public Read/Write for all 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.

Assigning Custom Permissions to User Profiles

You can define custom permissions for user profiles that allow the users to access the following X-Author Contracts features:

- Contracts tab
- Templates tab
- Check-in as final
- Check-in without redlines

- Check-in with redlines
- Unprotect document
- Unlock read-only clause
- Open and Open and Update option
- Disable Auto check out option

> ⓘ Irrespective of the user profile permissions, any user can check-in a document with redlines using X-Author for Contracts 1.0.

You need to perform one of the following actions for all the user profiles in your org to permit users to access X-Author Contracts features:

- Define the APTS_ProfilePermissions admin entry.
- Assign custom permissions to a user profile and enable the View Setup & Configuration permission.

The admin entry is given first priority and the next priority is given to custom permissions along with the View Setup & Configuration permission. If the admin entry is configured, the system does not check for custom permissions.

The following conditions apply when a user accesses the X-Author Contracts features:

> ⓘ You must configure XA_hidecheckoutmenu, XA_disableautocheckout, XA_disablecreateoffline, and XA_disableimportoffline custom permissions in the APTS_ProfilePermissions admin entry instead of View Setup & Configuration permission. As these custom permissions are not supported in View Setup & Configuration permission.

- If all the user profiles are included in the admin entry, users can access the features according to the feature access defined in the admin entry.
- If only a few user profiles are included in the admin entry:
  - Users with included user profiles can access the features according to the feature access defined in the admin entry.
  - Users with excluded user profiles cannot access any of the features.
- If the admin entry is not defined and all the user profiles have custom permissions along with the View Setup & Configuration permission, users can access the features according to the custom permissions available for the user profile.
- If the admin entry is not defined and only a few user profiles have custom permissions along with the View Setup & Configuration permission:
  - Users with user profiles for which all the custom permissions are available can access all the features.

- Users with user profiles for which only a few custom permissions are available can access only the features related to the available custom permissions.
- Users with user profiles for which no custom permissions are available cannot access any of the features.
- If the admin entry is not defined and all the user profiles have no custom permissions, users cannot access any of the features.

ⓘ You must not define some user profiles in the admin entry and the remaining profiles in the custom permissions.

To configure APTS_ProfilePermissions admin entry

The APTS_ProfilePermissions admin entry allows you to define custom permissions for user profiles.

1. Navigate to Admin tab.
2. Click **New**.
3. Enter **APTS_ProfilePermissions** in the Name field.
4. Enter JSON in the Value field.
5. In the Code field, you need to define the following parameters.

Parameters:

Name		Type	Description
id		ID	The id of a user profile.
name		string	The name of a user profile.
Permission		string	The X-Author Contracts feature name.
	Value	boolean	Indicates whether the user profile has the feature access.

Code

```
{
    "profiles":[
        {
```

```
        "id":"<UserProfileID>",
        "name":"<UserProfileName>",
        "permission":{
            "xa_contracts":"<value>",
            "xa_template":"<value>",
            "xa_checkinasfinal":"<value>",
            "xa_checkinwithredlines":"<value>",
            "xa_checkinwithoutredlines":"<value>",
            "xa_unlockreadonlyclause":"<value>",
            "xa_unprotectdocument":"<value>",
            "xa_hidecheckoutmenu":"<value>",
            "xa_disableautocheckout":"<value>"
        }
    }
```

Sample

```
{
    "profiles":[
        {
            "id":"00eW0000000EKg8",
            "name":"System Administrator 1",
            "permission":{
                "xa_contracts":"true",
                "xa_template":"false",
                "xa_checkinasfinal":"true",
                "xa_checkinwithredlines":"false",
                "xa_checkinwithoutredlines":"true",
                "xa_unlockreadonlyclause":"true",
                "xa_unprotectdocument":"true",
                "xa_hidecheckoutmenu":"false",
                "xa_disableautocheckout":"true"
            }
        },
        {
            "id":"00eA0000000nWXj",
            "name":"System Administrator N",
            "permission":{
                "xa_contracts":"true",
                "xa_template":"true",
                "xa_checkinasfinal":"true",
                "xa_checkinwithredlines":"true",
                "xa_checkinwithoutredlines":"true",
```

```
            "xa_unlockreadonlyclause":"true",
            "xa_unprotectdocument":"true",
            "xa_hidecheckoutmenu":"false",
            "xa_disableautocheckout":"true"
        }
      }
    ]
  }
```

ⓘ If the Code field has multiple entries for the same user profile, the first entry will be considered for feature access.

To assign custom permissions to a user profile

1. Create custom permissions. For more information, see Custom Permissions.
2. Go to **Setup** > **Manage Users** > **Profiles**.
3. In the Enabled Custom Permissions section, click **Edit**.
4. Add required Custom Permissions and click **Save**.

To configure View Setup & Configuration Permission

For information on how to configure View Setup & Configuration permission, see Profile Settings and Security.

Configuration Priority

The following table provides the details about which configuration is given priority:

APTS_ProfilePer missions	Custom Permissions	View Setup & Configuration	User Access
Yes	Yes	Not applicable	User is able to access the features according to the APTS_ProfilePermissions configuration.

APTS_ProfilePermissions	Custom Permissions	View Setup & Configuration	User Access
Yes	No	Not applicable	User is able to access the features according to the APTS_ProfilePermissions configuration.
No	No	Not applicable	User is unable to access the features.
No	Yes	Yes	User is able to access the features according to the custom permission.
No	Yes	No	User is unable to access the features.

Application Management Settings

Before you use the Conga CLM 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

Enabling Record Type for Template Authoring

After you create a new record type, you must add it to the list of available X-Author for Contracts 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 for Contracts, 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. A 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 Conga CLM templates.

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

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

Populating Picklist Values for Contract Object

1. Go to **Setup > Create > Objects.**
2. Under the Label column, click **Agreement** to edit the custom Agreement object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list and click the **Record Types** Field Label. The Subtype custom field definition is displayed.
4. Scroll to the Picklist values section and click **New.**

5. Add one or more picklist values. For example, for an NDA agreement, you can add One Way Inbound NDA, One Way Outbound NDA, Mutual NDA, Subcontractor picklist values. These picklist values can be applied to any type of agreement.
6. Select the Record Type Names for the picklist values and click **Save.**
7. To sort the picklist items in the desired order, click **Reorder.** You can sort the list alphabetically and select one of the values as the default value by choosing one of the values from the Default Value list. To keep the changes, click **Save.**

Picklist values for the contract object is populated.

Populating Picklist Values for Template Contract Types

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

Picklist values for the template contract types is populated.

Populating Picklist Values for Template Subcategory

1. Go to **Setup > Create > Objects.**
2. Under the Label column, click **Template** to edit the custom Template object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list.
4. Click the **Subcategory** Field Label.
5. Click **New** to create subcategory picklist values. Create subcategory picklist values similar to the way you created picklist values for the category.
6. Assign subcategory values to the appropriate categories.

7. Scroll to the Field Dependencies related list and click the **Edit** action to the left of the Subcategory dependent field. Follow the instructions to include or exclude subcategory values for a particular category.
8. Click **Save.**

Picklist values for the template subcategory is populated.

Creating Formula Fields for an Agreement Rule Criteria

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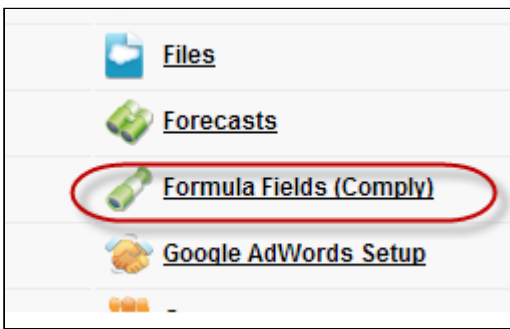
To create a formula field

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

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**.

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**.

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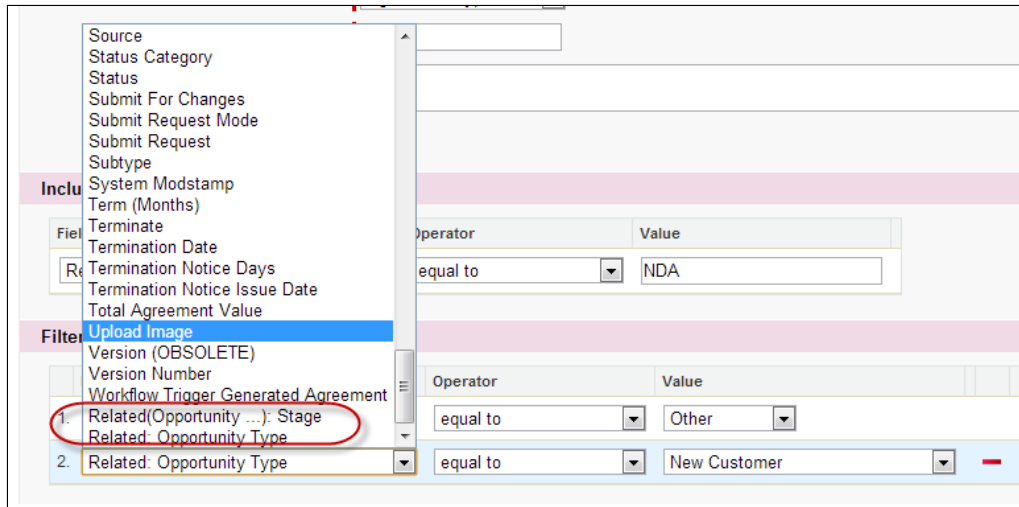
Saving Agreement Data

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

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

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

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

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

Conga CLM application treats all such freshly created agreements as transient data and displays the Is Transient checkbox 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 the 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.
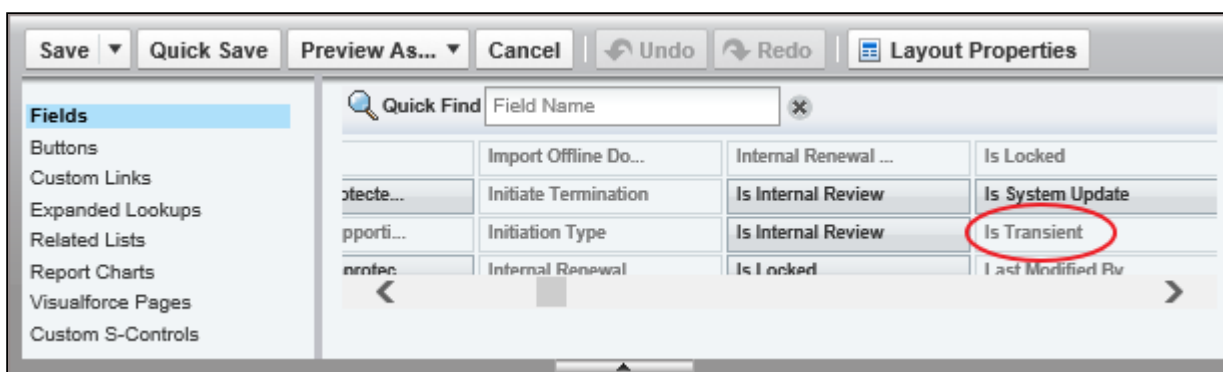
Overriding Base Clone Specifications

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

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

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

Overriding Clone Behavior of Custom Objects

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

By default only the base objects listed in the includes element are cloned. If one or more base objects are to be included, it can be accomplished by creating a custom clone specification and listing the base objects in the includes element. If one or more base objects are to 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).

Configure Clone Specifications Based on Record Types

You can configure separate clone specifications for each record type. If there are no clone specifications configured for a record type the default setting (APTS_ComplyConfig) is selected during clone operation.

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

Configuring clone, amend, and renew specifications indicate which custom objects need to be cloned as part of the agreement clone, amend, and renew operation. You can create specifications according to your requirement. Following are the sample specifications:

- Clone: APTS_ComplyConfig_Clone
- Amend: APTS_ComplyConfig_Amend
- Renew: APTS_ComplyConfig_Renew

If all the specifications are deleted or no specifications are configured, then all the field values are cloned when you clone, amend or renew an agreement. When the default APTS_ComplyConfig specification is configured and separate clone, amend, or renew specifications are not available, the default specification will apply when you clone, amend, and renew an agreement.

You can add Document Version Detail, Document Version, Note, and Attachment in the clone spec to copy documents to the cloned, amended, or renewed agreement (new agreement). The following table lists the various scenarios and their outcome when you use clone spec to clone, amend, or renew an agreement.

Document Version	Document Version Detail	Note	Attachment/ Files	Documents copied to the cloned, amended, and renewed agreement (new agreement)
True	True	True/False	True/False	All the document details and documents from the document version are copied from Document Version and Document Version Detail to the new agreement. By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement. ⓘ Conga recommends using this configuration.
False	False	True/False	True/False	No documents are copied from Document Version and Document Version Detail to the new agreement. By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement.

Document Version	Document Version Detail	Note	Attachment/ Files	Documents copied to the cloned, amended, and renewed agreement (new agreement)
True	False	True/False	True/False	Only the document details from the document version (the first level of the document version) are copied to the new agreement. By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement. ⓘ Conga does not recommend this configuration.

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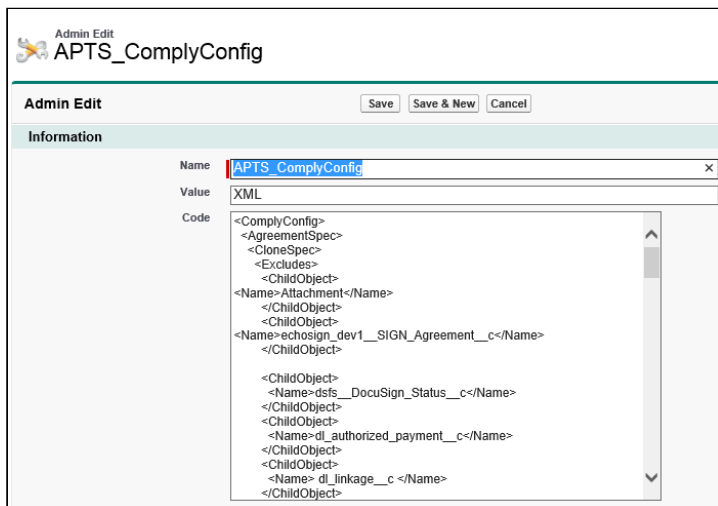
3. Click **Edit** and between the<ComplyConfig><AgreementSpec><CloneSpec> </
CloneSpec></AgreementSpec></ComplyConfig>tags, enter the
new<ClearFields>tags and then enter the API name for each agreement field that
you want to clear.

```
<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

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

```
<ComplyConfig>
    <AgreementSpec>
        <CloneSpec>
            <Includes>
                <ChildObject>
                    <Name>Apttus__APTS_Agreement__c</Name>
                    <IsOverridable>true</IsOverridable>
                </ChildObject>
                <ChildObject>
                    <Name>Apttus__DocumentVersion__c</Name>
                    <IsOverridable>true</IsOverridable>
                </ChildObject>
                <ChildObject>
                    <Name>Apttus__DocumentVersionDetail__c</Name>
                    <IsOverridable>true</IsOverridable>
                </ChildObject>
                <ChildObject>
                    <Name>Apttus__AgreementLineItem__c</Name>
                    <IsOverridable>true</IsOverridable>
                </ChildObject>
```

```
            <ChildObject>
                <Name>Note</Name>
                <IsOverridable>true</IsOverridable>
            </ChildObject>
            <ChildObject>
                <Name>Attachment</Name>
                <IsOverridable>true</IsOverridable>
            </ChildObject>
        </Includes>
        <ClearFields>
            <ClearField>
                <Name>Apttus__Special_Terms__c</Name>
            </ClearField>
        </ClearFields>
    </CloneSpec>
  </AgreementSpec>
</ComplyConfig>
```

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

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

Configuring Clone Specifications Based on Record Types

You can configure separate clone specifications for each record type.

To configure clone specifications based on record types:

1. Navigate to **Admin Home** page.
2. Click **New.** This displays Admin Edit page.
3. Enter the following details:

a. **Name:** APTS_ComplyConfig_<Action>_<RecordType>
   Sample value: APTS_ComplyConfig_Renew_MSA
   Ensure that you create a single clone specification for each record type.
b. **Value:** XML
c. **Code:** Enter clone specification

4. Click **Save.**

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**.

Adding and Defining Action Panel

The Action Panel is a collection of agreement action buttons that can be enabled for the Agreement Record page in the Classic mode for community portals. The Action Panel is created as a Visualforce Page component and you can include it in your page layout from admin objects. Each button in the action panel can be customized to meet your design requirements. The buttons have a default image and you can also use a custom image for buttons.

Prerequisites

Make sure that the required buttons are created. For more information, see Customizing Agreement Actions.

To add Action Panel from Salesforce Classic

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. Click APTS_CustomLinksforActionPanel.
3. In the **Value** field, enter the API names of required buttons separated by comma.
4. Click **Save.**

Conga CLM Objects

Conga CLM 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 for guidance only.

Object	Purpose of the Object
Account Hierarchy	This defines a single instance of an account hierarchy relationship. It contains the leaf ID, the parent ID, the root ID, and the level.
Agreement Action Condition	Represents conditions to enable agreement actions
Agreement Explorer	A reusable, unique combination of Field Sets and Filter Sets.

Object	Purpose of the Object
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 Conga CLM
Agreement Protection	Specifies protection settings for agreements generated by the Contract Wizard and maintained by the Contract Author
Agreement Rule Condition	Specifies a condition used to evaluate an agreement rule
Agreement Rule	Specifies a rule used to evaluate various agreement actions such as submit request
Agreement Term Exception	Term Exceptions associated with a given Agreement
Admin	Store admin preferences and metadata
Agreement	Represents an agreement in the system
Related Agreement	To identify the different types of relationships between agreements
Template	Contract language templates available in the system. These templates specify guidance, language, local 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

Object	Purpose of the Object
Content Event	Holds content events for subscribers to handle
Cycle Time Field Data	Holds the data captured on fields for cycle time reporting
Cycle Time Field	Holds the fields monitored for cycle time data capture
Cycle Time Group Data	Holds the data captured on groups for cycle time reporting
Cycle Time Group	Holds the groups monitored for cycle time data capture
Doc Assembly Component	Represents a single component in a document assembly rule
Doc Assembly Ruleset	Represents a rule set that contains a list of rules to determine the sections to include in a dynamic template.
Doc Assembly Rule	Represents a single rule in a document assembly ruleset
Document Agreement Clause	Agreement clauses in an agreement document
Document Version Detail	Holds the version details of a document
Document Version	Represents a document version
Agreement Document Output Format	Holds default output format preferences by user profile and agreement type for use in the agreement document generation process.
Formula Field (Comply)	Represents a formula field used in agreement rules
Merge Event Detail	Holds document merge event details
Merge Event	Holds document merge events for subscribers to handle
Query Template Filter	Filter expression used in a query
Query Template Qualifier	Filter used to select a query template

Object	Purpose of the Object
Query Template	Query Template for bulding soql queries and filters
Retention Policy	Holds object retention policies
Search Filter (Comply)	Represents a search filter
Template Clause Reference Version	Holds Template Clause References for this version
Template Clause Reference	Represents a clause reference in a template or a library
Template Datasource Filter	Represents a datasource filter associated with a template
Template Dynamic Section Version	Holds the template dynamic section details for a given template version
Template Dynamic Section	Represents a dynamic section in a template
Template Version	Holds various versions of this template and is a Master-detail to Template
Temp Object (Comply)	A container for temporary objects and attachments
Term Exception	Term Exceptions master table
Wizard	A runtime instance of the wizard design
Wizard Design	Holds all the wizard design records
Wizard Input Control	The individual question, instruction statements and associated field attributes
Wizard Input Control Runtime(Deprecated)	Input Control instance within a runtime wizard
Wizard Input Control (Deprecated)	The individual question, instruction statements and associated field attributes
Wizard Input Group (Deprecated)	Groups input controls within a step

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.
Wizard Step (Deprecated)	The step that is designed and used in Wizard designs.
Wizard Design (Deprecated)	Main Wizard Object, each record represents a Wizard design

Objects Supporting Document Generation

For any object to support Document Generation, there can be 2 options.

- For any object, if the value is Yes, the system supports Document Generation for that object but certain setup needs to be done.
- The value No indicates that the Document Generation is not supported for that object.

The following table contains the summary of whether Document Generation feature is supported for the specific objects or not:

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Merge service endpoint	Yes	Yes	Yes	Yes
Controlling Merge Call Time out (default 60sec)	Yes	Yes	Yes	Yes
Publish Merge Events	Yes	No	No	No
Generate Document from Record	Yes	Yes	Yes	Yes
PDF security on generated document	Yes	Yes	Yes	Yes
Protection on generated Word document	Yes	No	No	No
Versioning. Word document protection	Yes	Yes	Yes	SR
Async mode of Merge	Yes	Yes		
Template setup for default system filtering on generate and other Template functionality from X-Author	Yes	Yes	Yes	Yes
Auto Enabling Checking In for Final version in PDF format	Yes	Yes	Yes	Yes
Auto Enable Reconciliation	Yes	Yes	Yes	Yes
Header / Footer Stamp	Yes	No	No	No

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Enabling Term Exceptions In Author	Yes	No	No	No
Create New Template Check-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 • Header • Lookups • Related - In Section • Related - In Table	Yes	Yes	Yes	Yes
Document Assembly Rules	Yes	No	No	No
Filtered Rows	Yes	Yes	Yes	Yes
Conditional content	Yes	Yes	Yes	Yes

Feature Description	Agreement Object	Quote/ Proposal Object	Standard Salesforce Objects	Other Custom Objects
Auto-publish	Yes	Yes	Yes	Yes
Output Format (Doc, Docx, RTF, PDF) and add Watermark Support for the 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 a record and attach	Yes	No	No	No
Check-In third-party document. Import Offline – Attach to an existing record	Yes	No	No	No
Check-In document, attachment of the record. Versioning of the Documents, such as • With Redlines • Without Redlines • Final to be Signed • Watermark • Naming Override	Yes	Yes	Yes	Yes
Check-out document, attachment of the record	Yes	No	No	No

Feature Description	Agreement Object	Quote/Proposal Object	Standard Salesforce Objects	Other Custom Objects
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 2. X-Author	1. Yes 2. Yes	1. No 2. Yes	1. No 2. Yes	1. No 2. Yes
Chatter with Record	Yes	Yes	Yes	Yes

Temporary Email Template Cleanup

You may find in some cases that contents in your Apttus Temporary Email Templates folder contain sensitive contractual data as attachments to offline agreements. To remedy this, you can use the following APEX job and associated Comply System Property to clean up temporary email templates that are older than a configured period. When this job runs it checks for all temporary email templates older than the period configured by the new Comply System Property and deletes them.

Step 1: Configure APEX Scheduler Job

Schedule a new job using the Apex Scheduler using the standard Salesforce process.

1. From Setup, enter "Apex Classes" into the Quick Find box, select Apex classes, and click the **Schedule Apex** button.
2. Enter a **Job Name** and click the lookup button to choose **CleanupJobScheduler** as the Apex Class.
3. Choose the job **Frequency** and other execution options for the class.
4. Click **Save**.

Step 2: Configure Comply System Property

Use the Temp Email Template Inactive Hours Comply System Property to set the orphan period of temporary email templates to use in conjunction with the CleanupJobScheduler APEX class. The default value of this property is set to 4 hours.

1. Navigate to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to Comply System Properties.
3. Click **Edit**.
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.

Schedule Jobs to Refresh Agreement Data

Because the Agreement Explorer works off data stored in the most recent cache for the Agreement object, users may find that more recently created agreement records are not being listed in their reports. Users must use the **Refresh Data** button in Report Settings to refresh the data pool extracted from object tables in the database. Instead, you can schedule a job using the Apex Scheduler to refresh data such as agreement hierarchy and account hierarchy, in the background.

Agreement Hierarchy

Perform the following steps to schedule a job to refresh agreement hierarchy.

1. Go to **Setup**.
2. Under **Develop**, click **Apex Classes**.
3. Click **Schedule Apex**.
4. Enter a name in the **Job Name** field.
5. Click the lookup button next to the **Apex Class** field and select the AgreementHierarchySchedulableBatch class.
6. In the **Schedule Apex Execution** section, select the job frequency, start date, end date, and preferred start time for the class.
7. Click **Save**.

Accounts Hierarchy

Perform the following steps to schedule a job to refresh accounts hierarchy.

1. Go to **Setup**.
2. Under **Develop**, click **Apex Classes**.
3. Click **Schedule Apex**.
4. Enter a name in the **Job Name** field.
5. Click the lookup button next to the **Apex Class** field and select the AccountHierarchySchedulableBatch class.
6. In the **Schedule Apex Execution** section, select the job frequency, start date, end date, and preferred start time for the class.
7. Click **Save**.

Scheduling Expiration Date for Email Downloadable Link

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

Step 1: Configure an APEX Scheduler Job

1. Go to **Setup** > **Develop** > **Apex Classes** > **Schedule Apex**.
2. Enter the following information to configure the job parameters.
   a. **Job Name**: Enter a job name.
   b. **Apex Class**: Click the 🔍 icon. Enter AgreementDocumentEmailCleanupJob and select AgreementDocumentEmailCleanupJob.
   Frequency: Select Weekly or Monthly based on your requirement.
      i. If you select Weekly, you must specify one or more days of the week the job needs to run (such as Monday and Wednesday).
      ii. If you select Monthly, you must specify the date the or the day (such as the second Saturday of every month)
   d. **Start**: Select a start date.
   e. **End**: Select an end date.
   f. **Preferred Time**: Select a preferred time for the dropdown.
3. Click **Save**.

Step 2: Configure the Admin Object

1. Go to the **Admin** tab (click + and choose the **Admin** tab.) Click **Go** to view all Admin objects (your list can vary depending on which objects are already created).
2. Click **New Admin.** This displays the Admin Edit page.
3. Enter the name as **APTS_DownloadableLinkExpiration.**
4. Enter the value according to your requirement. The value field corresponds to the number of days to expire the downloadable link.
5. Click **Save**.

Adding Custom Locale

To create a custom locale, you need to first add a custom locale name and then add relevant locale code for the locale name. You can then set up custom locales to create localized templates or contracts in X-Author Contracts. You can select the number precision and currency precision according to your requirement, but the date format and number format are displayed based on the Locale Code.

Prerequisite

- Ensure to format the Locale Names and Locale Codes correctly as there is no system validation on these values.
- You cannot create duplicate locales or create locales with the standard Locale Names which come available with the Contract Management application (refer to Standard Locale Names and Locale Codes).
- You must provide the Locale Code in <ISO Language code>-<ISO Country code> format. The locale code is not case sensitive.

To add a custom locale

1. Go to **Setup** > **Build** > **Create** > **Objects**.
2. Click the **Template Locale** hyperlink.
3. In the Custom Fields & Relationships section, click the **Locale Code** hyperlink.
4. In the Values section, click **New**.
5. Enter the locale code.
6. Click **Save**.
7. Navigate back to Template Locale.
8. In the Custom Fields & Relationships section, click the **Locale Name** hyperlink.
9. In the Values section, click **New**.
10. Enter the locale name.
11. Click **Save**.
12. In the Locale Name page, navigate to the Field Dependencies section and click **Edit** before Locale Code.
13. Click Next and find the locale name that you have added.
14. Select the locale code that you have added.
15. Click the **Include Values** button.

To make a custom locale available for X-Author Contracts

1. Navigate to the Locale tab.
   This displays the Locale Home page.
2. Click **New**.
   This displays the Locale Edit page.
3. Select a locale name from the Locale Name dropdown.
   The Locale Code field is auto-populated based on Locale Name input.
4. Select Number Precision and Currency Precision from the Default Number Precision and Default Currency Precision dropdown respectively.
5. Click **Save** to save your locale setting or click **Save & New** to save the current locale setting and add a new locale setting.

Standard Locale Names and Locale Codes

The following table lists the standard locale names and locale codes that are available in Contract Management:

Locale Name	Locale Code
Chinese	zh-CN
English (Canada)	en-CA
English (Ireland)	en-IE
English (United Kingdom)	en-GB
English (United States)	en-US
German	de-DE
Greek (Greece)	el-GR
Italian	it-IT
Japanese	ja-JP

Locale Name	Locale Code
Korean	ko-KR
Norwegian	nb-NO
Polish	pl-PL
Portuguese	pt-BR
Russian	ru-RU
Russian	ru-RU
Spanish	es-ES
Swedish	sv-SE
Thai	th-TH

Configuration to Email Multiple Agreement Documents in Lightning

You need to whitelist your domain for cross-origin resource sharing (CORS) in Salesforce Lightning to email multiple agreement documents in lightning.

To configure CORS

1. Go to **Setup** > **Security** > **CORS**.
2. In the Whitelisted Origins section, click **New**.
3. In the Origin URL Pattern field, add *<yourdomainname>*.lightning.force.com
   Sample value: https://testclm.lightning.force.com.
4. Click **Save**.

Configuring Email Templates in Lightning

You can create separate email templates for Lightning that you can view while submitting request, sending documents for review, and signatures in Lightning. You can also restrict the availability of these email templates to a group of users.

You must create a temporary folder to save temporary templates. If you do not create the temporary folder, the temporary email templates are added to the folder that contains Lightning email templates.

You can add merge fields in the subject as well as the body. To add a merge field in the subject, you need to add the merge field in the body then copy the merge field to the subject.

You can also configure agreement rules to autoselect an email template when you are submitting request, sending documents for review, and signatures in Lightning. For more information on configuring agreement rules, see Setting Up Rule-based Agreement Request Process Parameters.

To configure email templates in lightning

1. Go to **Setup** > **Email** > **Lightning Email Templates**.
2. Enable Folders and Enhanced Sharing.
3. Go to the **Email Templates** tab.
4. In the Folders section, click **All Folders**.
5. Click the **New Folder** button.
6. Enter the Folder Label and Folder Unique Name according to your requirement and click **Save**.
7. Navigate to the All Folder page and click the **New Email Template** button.
8. Enter the template's name.
9. From the **Related Entity Type** dropdown list, select **Agreement**.
10. *(Optional)* Enter a description.
11. Click the **Select Folder** button and select the folder that you created in Step 6.
12. If you want, select a letterhead from the **Enhanced Letterhead** dropdown list.
13. In the HTML Value field, compose the email to use as your template.
14. Add any images you want in the template. Use the **Insert Images** icon or copy and paste the image.
15. Click the **Merge** icon and use the merge picker to insert merge fields.
16. Click the **Source** icon to add HTML code.
17. Add any attachments you want in the template.
18. Click **Save**.

To share the email template folder with other users

1. In the Folders section, click **All Folders**.
2. Click ⏷ next to the folder you want to share.
3. Select **Share**.
4. Enter the required details and click **Done**.

To configure a temporary folder

1. Navigate to the Email Templates tab.
2. In the Folders section, click **All Folders**.
3. Click the **New Folder** button.
4. Enter the Folder Label as *ApttusLightningTempEmailTemplate*.
5. Enter the Folder Unique Name as *ApttusLightningTempEmailTemplate.*
6. Click **Save**.

Setting Up Organization-Wide Email Address

The organization-wide email address allows you to associate an email address to user profiles. When you assign an organization-wide email address for all the user profiles or selected user profiles, users can use the common email address while sending emails. You can set up multiple organization-wide email addresses, but you can use only one organization-wide email address to send emails. When an organization-wide email address is not set up then the logged-in user email address is used to send emails.

Prerequisites

You must configure the following comply system properties:

- Organization-Wide Email Address Display
- Use Organization-Wide Email Address

For more information, see Comply System Properties.

To set up or organization-wide email address

1. Go to **Setup** > **Email** > **Organization-Wide Email Addresses**.
2. Click **New**.

3. Enter a display name and email address.

> ⓘ The display name that you add here must also be added in the *Organization-Wide Email Address Display* comply system property.

4. According to your requirement, select one of the following options.
   a. Allow All Profiles to Use this From Address
   b. Allow Only Selected Profiles to Use the From Address
5. Select profiles for which you want to allow the users to select the organization-wide address.
6. Click **Save**.

Generating Registration Setting

Smart search is part of the base package. Conga recommends that the Registration Setting must be available for only Admin users.

Registration setting is required to use the Smart Search feature. If you are a Conga licensed user, you can automatically Generate the registration setting by using an authentication code sent to your email address. If the domain of your email address matches with the domain of the contact email address maintained in Conga's LMA system, the Registration Setting is generated. If you are a licensed user and encounter any errors or do not receive an authentication code while generating registration setting automatically, within 72 hours you will receive an email with registration details from maxcustomersupport@conga.com and you can add registration details manually by using the Add Details button.

When you generate registration setting details automatically, the Registration URL is added by default. If you need to use any other URL, you need to configure CSP Trusted Site and Remote Site Setting for the URL.

Contact the Conga Support team if you:

- You need assistance in generating registration setting.
- You need to change any registration setting details (Registration URL, API Token, or Tenant).
- You are not a licensed user and want to use the Smart Search feature.

Prerequisite

- You must have an enterprise license for any of the Conga products.

- You have activated remote site settings (IntegrationSettingProd and IntegrationSettingSandbox), and CSP trusted sites (IntegrationSettingsProdURL and IntegrationSettingsSandboxURL). For more information, see Connecting to External APIs.

Restriction

You can configure only one registration setting per org.

To generate registration setting details automatically

1. Go to the Registration Setting tab.
2. Click **Generate**.
   The Generate Registration Setting popup is displayed.
3. In the Customer Name field, enter your organization name.

   > ⓘ In the Customer Name field, you can only add alphanumeric characters without any space.

4. *(Optional)* Enter a new registration URL.
   The Registration URL is automatically added based on the org (production or sandbox) you are using. You can update it according to your requirement.
5. Select **Search Content in Large File** checkbox to allow users to searching content in large files.

   > ⓘ Ensure that you select the checkbox only if you need to search content in large files (file size greater than 10 MB). Users might observe an increase in page loading time after selecting the checkbox.

6. Click **Generate**.
   An email with Tenant, SmartSearch Endpoint URL, and One-time key is sent to your email address if you are a licensed user. The validity of the authentication code is 10 minutes.
7. *(Optional)* If you do not receive the authentication code in 15 seconds, the **Send Authentication Code again** hyperlink is enabled and you can click the hyperlink to generate a new authentication code.
   If you still do not receive the authentication code or encounter any errors, you can revisit the Registration Setting page after 72 hours and add the registration setting details manually or contact the Conga Support team.

> ⓘ If you click the **Send Authentication Code again** hyperlink, the previously generated one-time key will not be valid.

8. Enter the One-time key from the email in the Authentication Code field and click **Verify**.
The Registration Setting is generated.

> ⓘ If you cancel the generation process and restart the generation process, you cannot enter the same customer name that you used the first time as the name is locked for 15 minutes. To use the same name, you can retry with the same name after 15 minutes.

To add registration setting details manually

Prerequisite: Ensure that you have received an email with registration setting details from the Conga Support team.

1. Go to the Registration Setting tab.
2. Click **Add Details**.
3. Enter Tenant, Registration URL, API Token from the email.
4. Select **Search Content in Large File** checkbox to allow users to searching content in large files.

   > ⓘ Ensure that you select the checkbox only if you need to search content in large files (file size greater than 10 MB). Users might observe an increase in page loading time after selecting the checkbox.

5. Click **Save**.

To edit registration setting details

Prerequisite: You have requested and received a new API token and registration details from the Conga Support team. The Conga Support team will share the new registration details via email.

1. Go to the Registration Setting tab.
2. Click **Edit**.
3. Update the required details.
4. Click **Save**.

Configuring Notification Email for Review Cycle Cancellation

You must create a classic email template to notify reviewers when a review cycle is cancelled.

To create the parallel review cycle cancellation email template

1. Go to **Setup** > **Email** > **Classic Email Templates** > **New**.
2. Select **HTML** and click **Next**.
3. Enter **ParallelReviewCycleCancelNotification** in the Email Template Name field.
4. Select remaining options according to your requirement and click **Next**.
   For more information, see Salesforce documentation.
5. Add a subject for the message and add an HTML message.
6. Click **Next**.
7. Click **Copy text from the HTML version** to automatically paste the text from your HTML version without the HTML tags.
8. Click **Save**.

Managing Templates

Conga CLM 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. A template can be termed as a blueprint or mold for creating distributable documents.

X-Author for Contracts 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 agreement/proposal
- Insert clauses from clause libraries which get resolved during the generation of the contract agreement
- Translate contracts from one language to another

> ⓘ 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 X-Author for Contracts.

- Setting Up Template Object for Contract Management
- Securing Documents
  Word Trust Center/Protected View options can impact your ability to see generated documents and should be disabled before you begin using X-Author Contracts.
- **Agreement Clause**
  Clauses have embedded merge fields contained within them that get auto-populated during agreement creation time.
- **Agreement Clause Subcategories**
  Subcategory picklists display values based on what was selected in the Category picklist. The picklists also now behave the same for both the Playbook and Create Section dialog, in that they both have Category and Subcategory drop-down lists.
- **Creating Offline Agreements**
  You can create offline agreements directly in X-Author by taking an existing Word document that was created outside of Salesforce and has not previously been associated with an agreement.
- **Auto Publishing**
  Publishing templates improves document generation performance by taking referenced clauses in a template and 'publishing' them before the template is used to generate a document. This takes the content of the clause and enters it into the template body as static text, as if it was another part of the main template. Auto-publishing enhances this by enabling you to schedule a batch job, which will

automatically complete the publishing task that previously needed to be completed manually.

- Document Generation for Templates with Nested Clauses

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

- Query Template

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

- **Template Datasource Filter**

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

- **Dynamic Document Assembly**

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

- Setting Up Template Filtering Rules

  By setting up the template filtering rules, the Template selection page can be configured to set up 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 set up by an administrator and allows agreement fields and related child object fields to be used in selecting the templates.

- **Agreement Term Exception**

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

About Agreement Phases

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

- Amendment
- Renewal
- Termination
- Expire

For details, refer to Status Categories and Statuses.

Amendment

User Permissions Needed	
To amend an agreement:	Agreement: Create, Edit

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

Renewal

User Permissions Needed	
To renew an agreement:	Agreement: Create, Edit

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

Termination

User Permissions Needed	
To terminate an agreement:	Agreement: Edit

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

Expiration

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

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

Configuring Agreement Clause Categories and Subcategories

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

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

These picklists display when you perform the following actions:

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

To set up a clause:

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

Agreement Clause Subcategories

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

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

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

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

To match Agreement Clause and Template Categories and Subcategories

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

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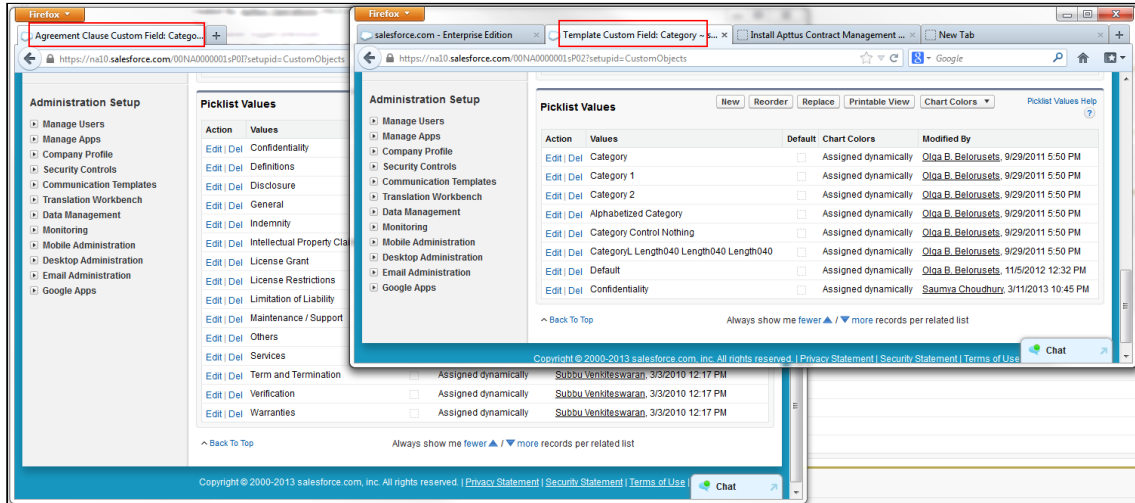
4. Return to the Custom Fields & Relationships section for both objects and click **Subcategory.** Similar to the previous step, modify mismatching picklist values so they are the same for both objects.

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.
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.

Configuring Agreement Term Exception

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

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

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

1. Creating an Admin Entry for Term Exception
2. Creating a Term Exception
3. Associating a Term Exception with a Clause

After you follow the above-mentioned procedures and generate an agreement document, the generated agreement document reflects the agreement term exception. You can also view the agreement term exceptions associated to your agreement record in the Agreement Term Exception related list. You can also associate an approval process (Term Exception Approval) with the term exception record if your exception clause or term has to be

approved by a higher authority before being inserted in your agreement document. For more information, see Approvals.

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

Creating an Admin Entry for Term Exception

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

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

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

Creating a Term Exception

User Permissions Needed	
To create, edit an Agreement term exception:	Agreement Term Exception: Read, Create, Edit Agreement: Read, Edit

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

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

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.

4. Click **Save.**

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

Associating a Term Exception with a Clause

Prerequisites

- 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 for Contracts Templates** in Microsoft Word.

Steps

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 for Contracts Templates** in Microsoft Word.
4. Click **Save.**

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

Configuring Dynamic Document Assembly

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 for Contracts determine attachment content during document generation.

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

> ⚠ Support for the Agreement at the line-item level is only enabled for users of Conga CLMand X-Author for 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 Conga CLM Product suite.

Filter rules are enabled through the **Document Assembly Rulesets** tab and X-Author for Contracts 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 for Contracts. These

Dynamic Sections in the template are the link to the associated Ruleset, and therefore to the prescribed content.

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

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

Dynamic Document Assembly Elements

The following elements comprise Dynamic Document Assembly.

Doc Assembly Ruleset

Dynamic Document Assembly uses the **Doc Assembly Ruleset** as the container object for the functionality as shown in the following figure:
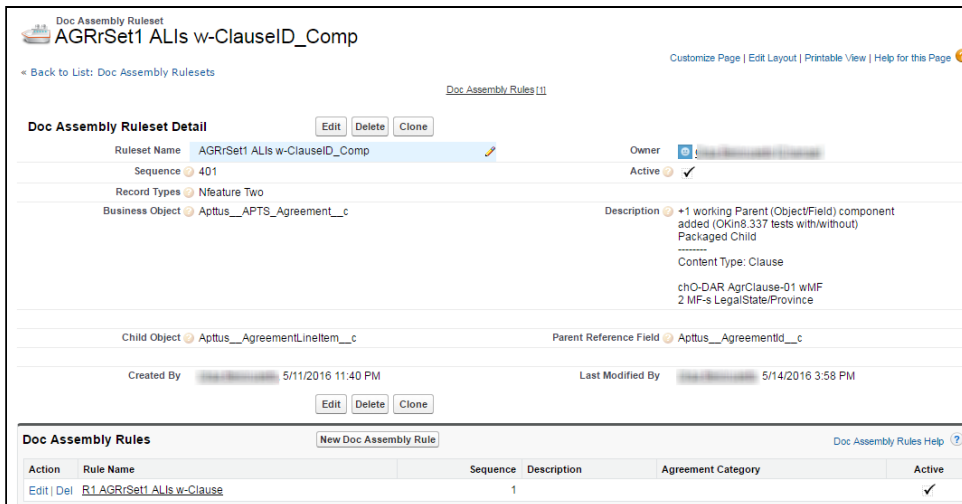
Doc Assembly Ruleset is the main object that contains all of the sub-objects and components required for document assembly. This object contains fields, such as Business Object and Record Types (A). These fields control which object record and which specific

record types of that object can use the rules. There can be one or more Doc Assembly Rules (B) for each ruleset.

Doc Assembly Rules

Doc Assembly 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

Each Doc Assembly Component contains a reference to a single template or clause that has been created in X-Author for Contracts. 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.

Dynamic Document Assembly Workflows

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

- Dynamic Document Assembly Workflow: Clauses

  The Conga CLM 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.
- Configuring Dynamic Document Assembly

  Learn how to clone Document Assembly Rulesets, Document Assembly Rules, and all
  the associated components.

Creating Custom Fields

You can create a custom field and configure where you want it to appear in the
application.

To create custom fields

1. From **Setup**, go to **Create** > **Objects** > **Agreement**.
2. From **Custom Fields & Relationships**, click **New**. Dynamic Document Assembly
   supports custom fields of all data types, except *Picklist (Multi-Select)* and *Text Area
   (Long)*.
3. Follow the standard Salesforce instructions for creating a field.
4. After you have created all the fields on the **Agreement** object, go to **Create** > **Objects**
   > **Doc Assembly Rule**.
5. From **Custom Fields & Relationships**, click **New**.
6. Create the exact same fields that you did for the Agreement object and you must use
   the same API names to ensure the correct auto mapping of fields between the
   agreement object and the rule.

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

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

ⓘ **Note**

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

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.

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

Configuring Dynamic Document Assembly

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

Creating Dynamic Document Assembly Rulesets

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

define the ruleset for which the template is applicable for an agreement. This blank template is used as the master agreement template.

- Once you click Generate or Preview, if the agreement satisfies the rules defined in the document ruleset, the corresponding master agreement template for that ruleset is shown. Select the master agreement template and click Generate. All the components defined in the Document Rule set are inserted in the sequence by which they are defined.

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

Doc Assembly Rule Filter Logic

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

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

Creating a Document Assembly Fieldset

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

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

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

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

> ⓘ If there is no Apttus__APTS_Agreement__c entry, you should create one first and then enter the field set name.

# Populating a 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.

Adding 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.**

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

Adding DAR for the Proposal Object

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

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

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

Creating Doc Assembly Rulesets

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

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 then the rule may be applied; however, if it does not match then the rule is 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.

To create new templates or edit existing templates and include Dynamic Sections in them, see Setting Segments in Templates.

Dynamic Document Assembly Workflow: Attachments

Using Dynamic Document Assembly, you can merge independent attachments from lookups (e.g., Products) to 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.

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

Configuring Dynamic Document Assembly

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

Creating Dynamic Document Assembly Rulesets

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

components defined in the Document Ruleset are inserted in the sequence by which they are defined.

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

Configuring Dynamic Document Assembly Custom Properties

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

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

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.**
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"

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

Populating the Doc Assembly Component Type Picklist

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

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

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

Adding Context Fields to the Doc Assembly Ruleset Page Layout

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

1. From **Setup,** go to **Create > Objects > Doc Assembly Ruleset.**
2. From **Page Layouts,** click **Edit.**
3. From the Layout editor, drag and drop the **Child Object** and **Parent Reference Field** into the Information or System Information sections of the layout.
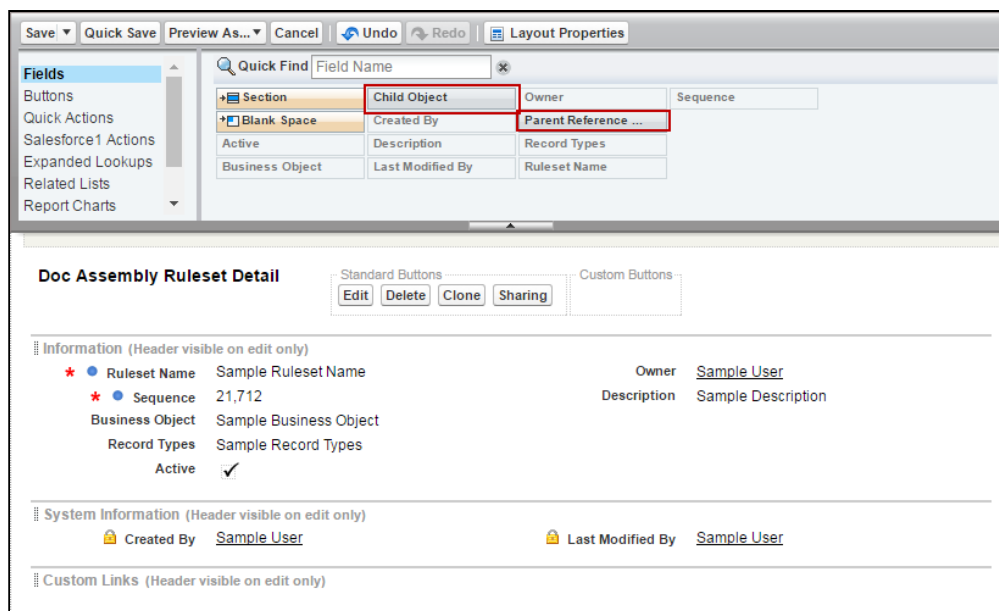
4. Click **Save.** Repeat this process for each Ruleset Layout you have created.

Adding Attachment Fields to the Doc Assembly Component Page Layout

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

1. From **Setup,** go to **Create > Objects > Doc Assembly Component.**

2. From **Page Layouts,** click **Edit.**

3. From the Layout editor, drag and drop the **Component Type, Field Name,** and **Attachment ID** fields into the Information section.
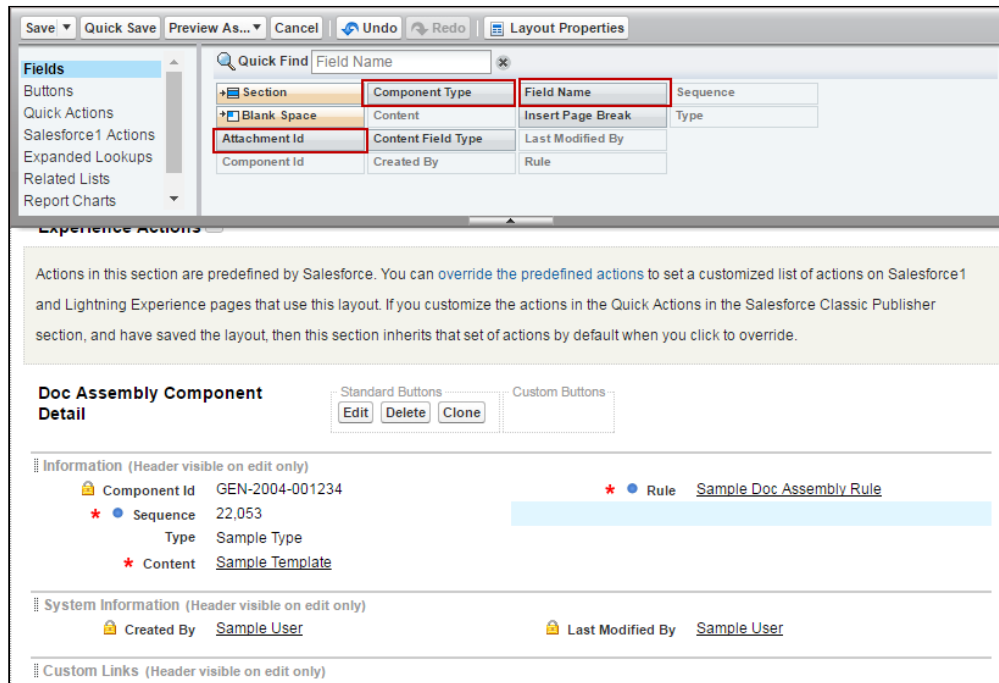
4. Click the configuration icon next to the **Content** field to display Field Properties.

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.

6. Click **Save.**

7. Repeat this process for each Ruleset Layout you have created.

Including the Related Lists

1. From **Setup,** go to **Create > Objects > Template.**
2. From the **Page Layouts** section, click **Edit** beside the layout you want to add the Related List to.
3. Select **Related Lists** and drag and drop the following Related Lists onto the page.
   - **Doc Assembly Components:** When you create a Doc Assembly Component and use it in your template, this Related List will have a new record added to it.
   - **Template Dynamic Sections:** When you add a dynamic section to a template using **Insert Dynamic Sections** ribbon from **X-Author Templates,** this Related List will have a new record added to it.
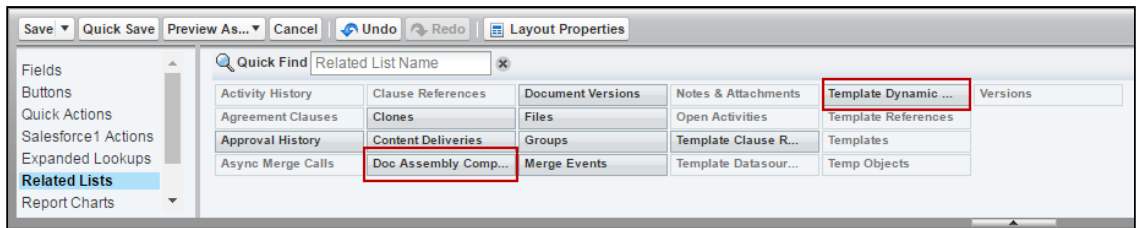
4. Click **Save.** The Related Lists are now displayed on that Template page layout.
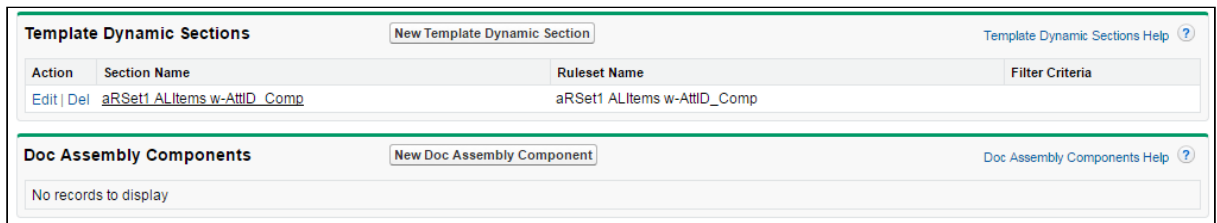
Enabling DAR for the Proposal Object (Optional)

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

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

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

Creating Doc Assembly Rulesets

User Permissions Needed	
To create a Doc Assembly Ruleset:	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
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.

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 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 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 be looking something like the following.

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

Creating Doc Assembly Rules

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

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 does not match then the Rule will be skipped. Note: If you are filtering the Rule using these values, you must have configured a Field Set as described in Dynamic Document Assembly Workflow: Clauses.

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

Creating Doc Assembly Components

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

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.
	
	     • **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.
	    • *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, see Setting Segments in Templates.

Cloning Dynamic Document Assembly

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

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

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

> (i) The Conga CLM Clone action button overrides the standard Salesforce Clone action button. The new Clone action button redirects you to the *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.
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.

The fields, such as Cloned From and Cloned From Reference, on the Template detail page enable you to track the cloning information of the content in a component, which can be a

clause or template. These fields are populated by X-Author Contracts when checking in a cloned template.

Configuring Offline Agreement Window

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

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

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

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

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

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

Configuring Offline Agreement Window Fields

1. Go to **App Setup** > **Create** > **Objects** > **Agreement**.
2. From the FieldSets section, click **Edit** for Offline Agreement FieldSet.
3. In the FieldSet frame displays the current fields used for the Create Offline Agreement window. This is a mandatory field.
4. 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.

5. Click **Save**.

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

Permissions to Create Offline Agreement

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

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

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

Agreement Number/Header Configuration

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

- 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 agreement number value.
- *If* the **Auto Insert Header Footer Data** system property is checked (set to true),
- *AND* the **Agreement Number Field** For Imported Docs contains an API field name value, then the value of header will be set to that field's value.

Setting the Date and Time Format for the Footer

1. From Setup, go to **Develop** > **CustomSettings** 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.
3. Click **Save**.

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

Supported DateTime Format	Example
yyyy'-'MM'-'dd HH':'ss'Z'	2006-08-22 06:30:07Z
dddd, dd MMMM yyyy HH:mm:ss	Tuesday, 22 August 2006 06:30:07

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.

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

Configuring Import Offline Button

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

1. In Microsoft Word, select the **X-Author** ribbon and login.
2. Open the agreement document, currently kept outside of Salesforce, to be used to create the offline agreement.
3. Click **Check-In**.
4. Enter values for the mandatory fields.
5. Enter any remaining details for the agreement and click **Save**.
   The agreement is added to the system, with the Word doc used to create the agreement available in the Notes & Attachments related list.

Adding Document Info Type Field in an Agreement

1. From **Setup**, go to **Create** > **Objects** > **Merge Event**.
2. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.
3. Enter *Create Offline Agreement* and *Import Offline Agreement* on separate lines and click **Save**.
4. From **Setup**, go to **Create** > **Objects** > **Agreement Protection**.

5. Under **Custom Fields & Relationships**, click **Action** and for **Picklist Values** click **New**.
6. Enter *Import Offline Agreement* and click **Save**.
Document protection can now be extended to documents that were imported.

Document Info Type Included at Check-in

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

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

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

Configuring Template DataSource Filter

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

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

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

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

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

To define custom objects for Search Filter (Comply)

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

Configuring Template Versioning

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

In short, template versioning allows template admins to:

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

How Template Versioning Works

Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template, and multiple child references to clauses and

sections contained in that template. For every instance of that template, there is always only one template which can be considered active (the version selected by the user to generate the contract or the version of the clause inserted into an agreement template).

More specifically, whenever a new template is created by any means, one instance of the template is created, stored in the Template object in Salesforce, and any clauses or dynamic sections nested in the template are stored in the Template Clause Reference and Template Dynamic Section objects respectively. The Template object has a master-detail relationship to both child objects, as shown in the following figure.
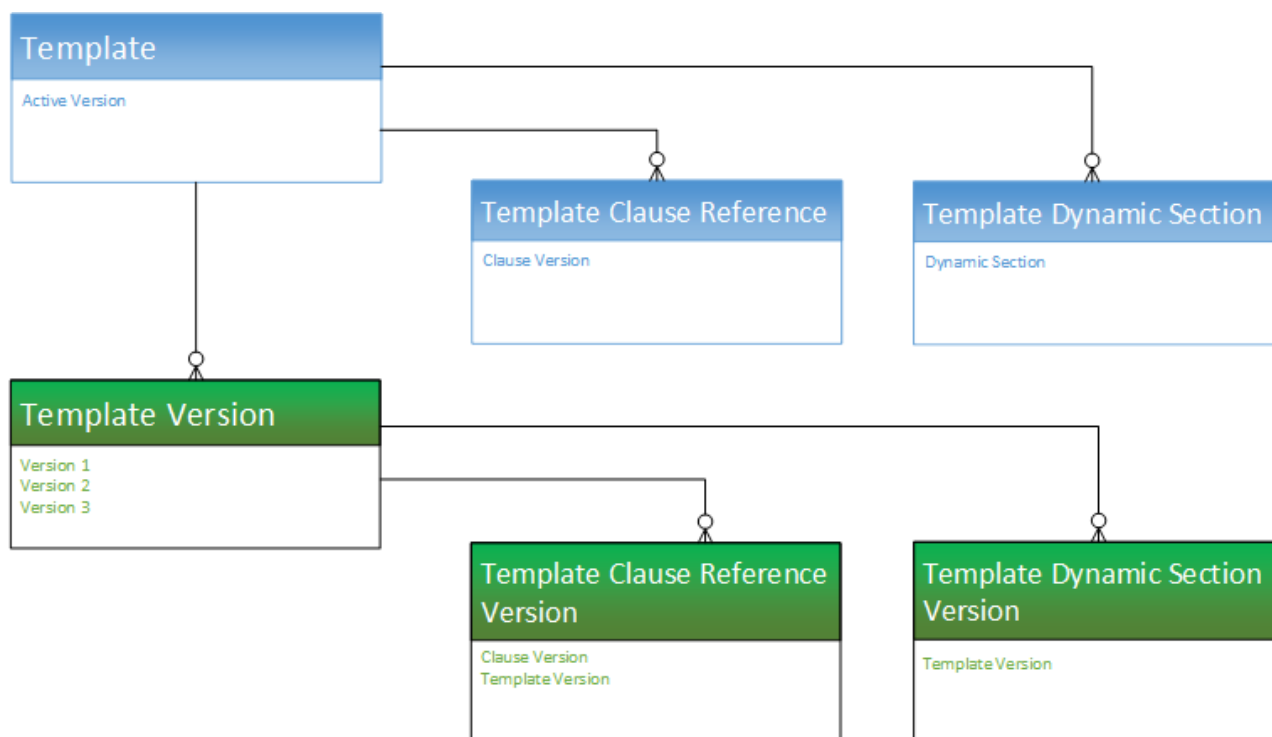
What Template Versioning does is preserve the same template, we'll call it the "**Header Template**," which has a one-to-one relationship with the Active Version of the template and its child objects, and a one-to-many relationship with other versions of the template, which also have versioned clause and section references, but are considered inactive.
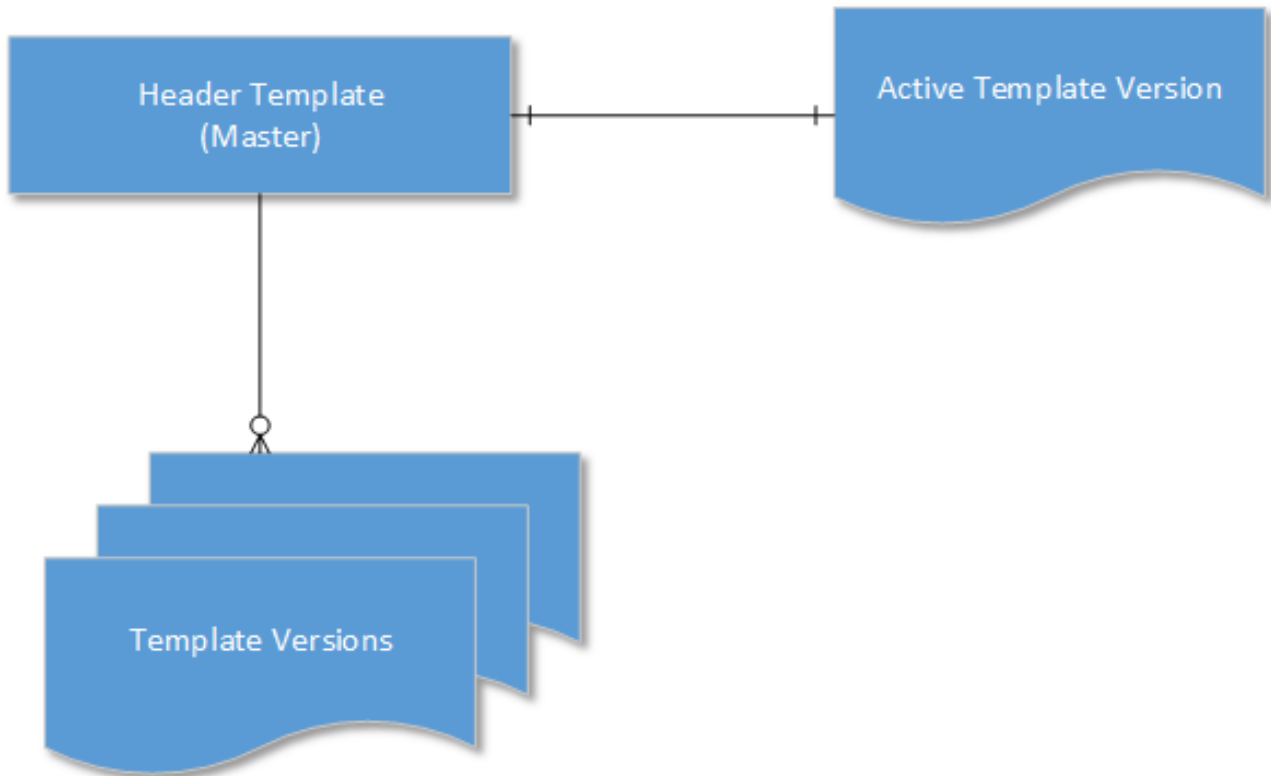
Template Versioning introduces three new objects:

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

Enabling Template Versioning

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

The following steps are required:

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

The following steps are optional:

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

Enabling Template Versioning

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

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

Adding the Version Related List to the Templates Layout

1. Follow standard Salesforce instructions for editing the Template object layout (e.g., click "Edit Layout" from the Template details page).
2. From the Template layout console, click on **Related Lists.**
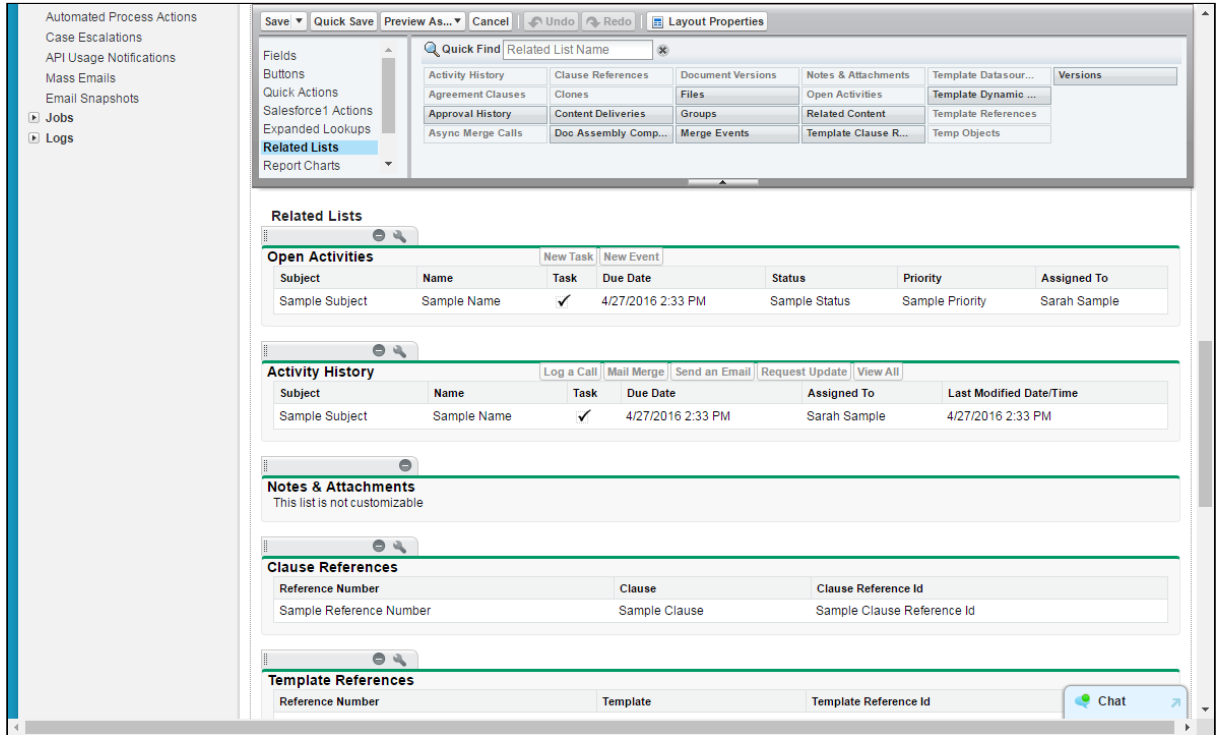
3. Drag the **Versions** Related List into your Template layout.
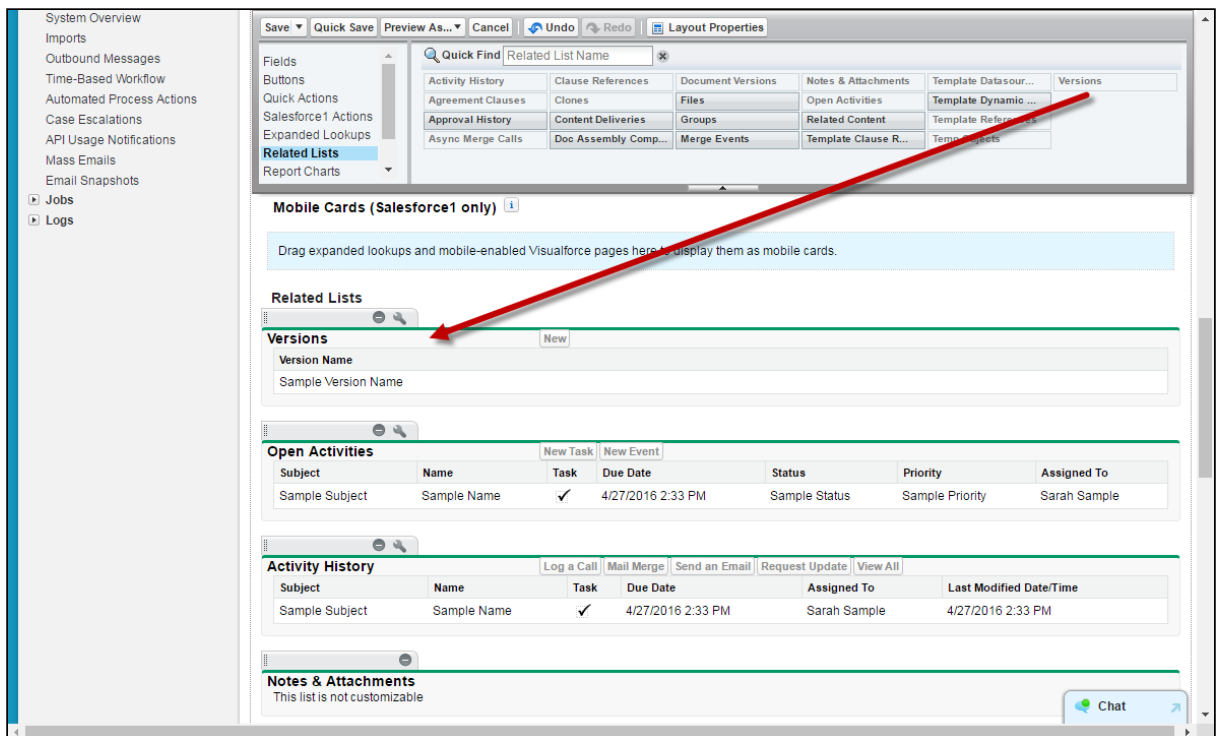
4. Click **Save**.

Adding Optional Activate fields to the Template layout

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

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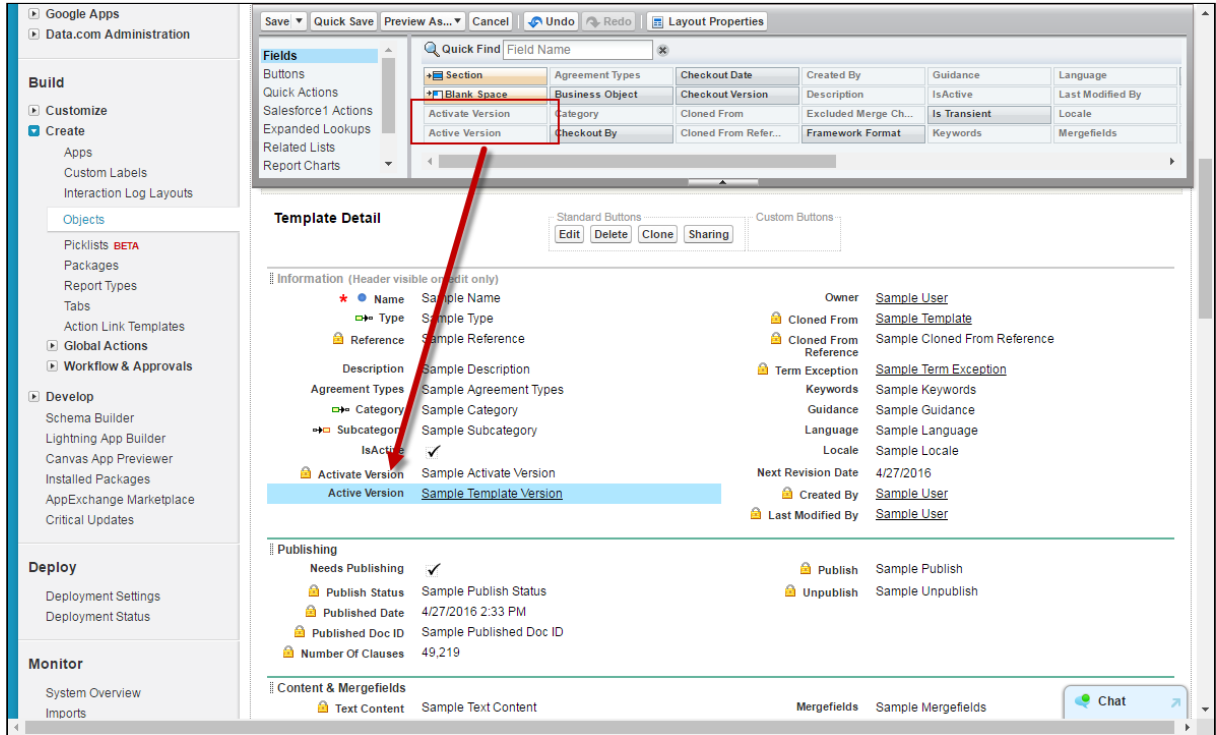
4. Click **Save**.

   Template Details should now display the active version of the current template record and provide an "Activate Version" button for activating templates from within Contract Management.
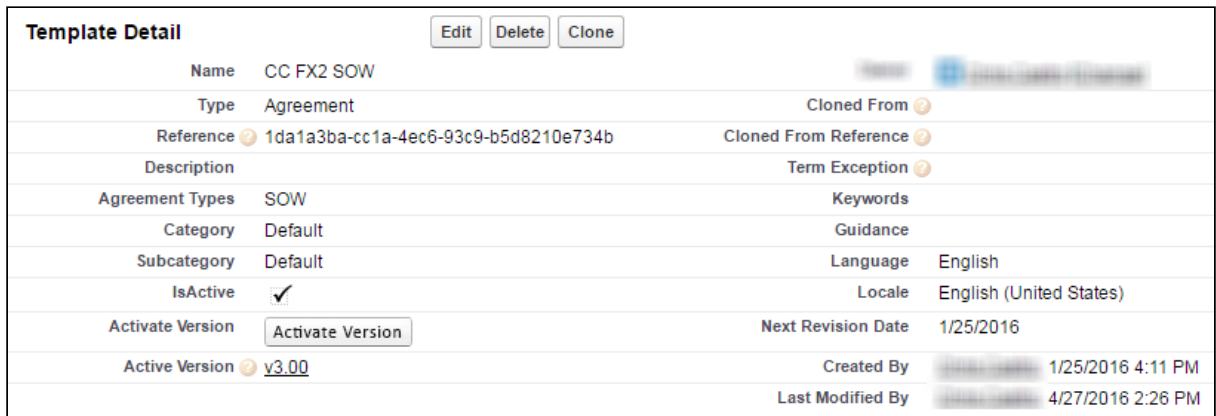
Managing Template Versions in X-Author Contracts

Template administrators primarily use X-Author for 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 for 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 for Contracts, see X-Author Contracts documentation.

Managing Template Versions in Contract Management

The following sections in this section explain how to accomplish some of the above tasks in Conga CLM, including:

- Activating Template Versions
- Cloning Template Versions
- Publishing Template Versions

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 Conga CLM.

> ⬢ It is highly recommended that template versions be activated strictly from X-Author for Contracts.

Prerequisites

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

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

To activate a template version

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

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

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.

Template Version Activation Successful

▼ **Template Information**

Template Name	CC FX2 SOW
Template Version Name	v3.00

Return
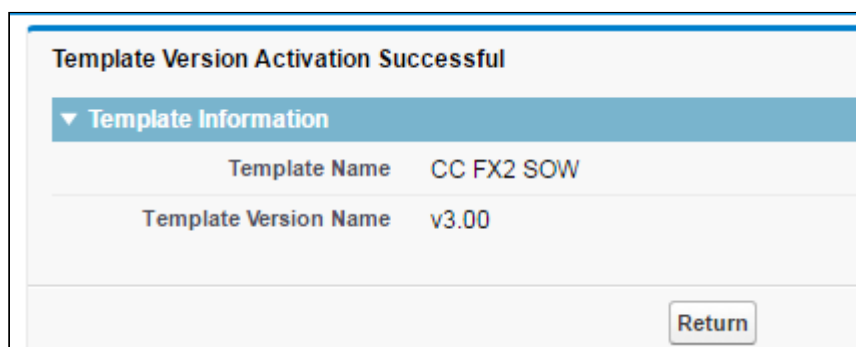
ⓘ When a template version is successfully activated, every template above it will be flagged as "Needs Publishing." For example, if you change the active version of a Payment Terms clause which is used in three templates, all three templates will be flagged. For information on publishing template versions, 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.

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.

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.

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

Publishing Template Versions

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

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

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

> ⚠ If a template has 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:

Sam Sales works for Tier One Systems, and is managing two different master templates, and MSA and MCA. Both templates contain the same Net Payment Terms clause (version 1.0). The figure below represents the template and clause hierarchy for both templates. Note the Net Payment Terms clause is nested under both.
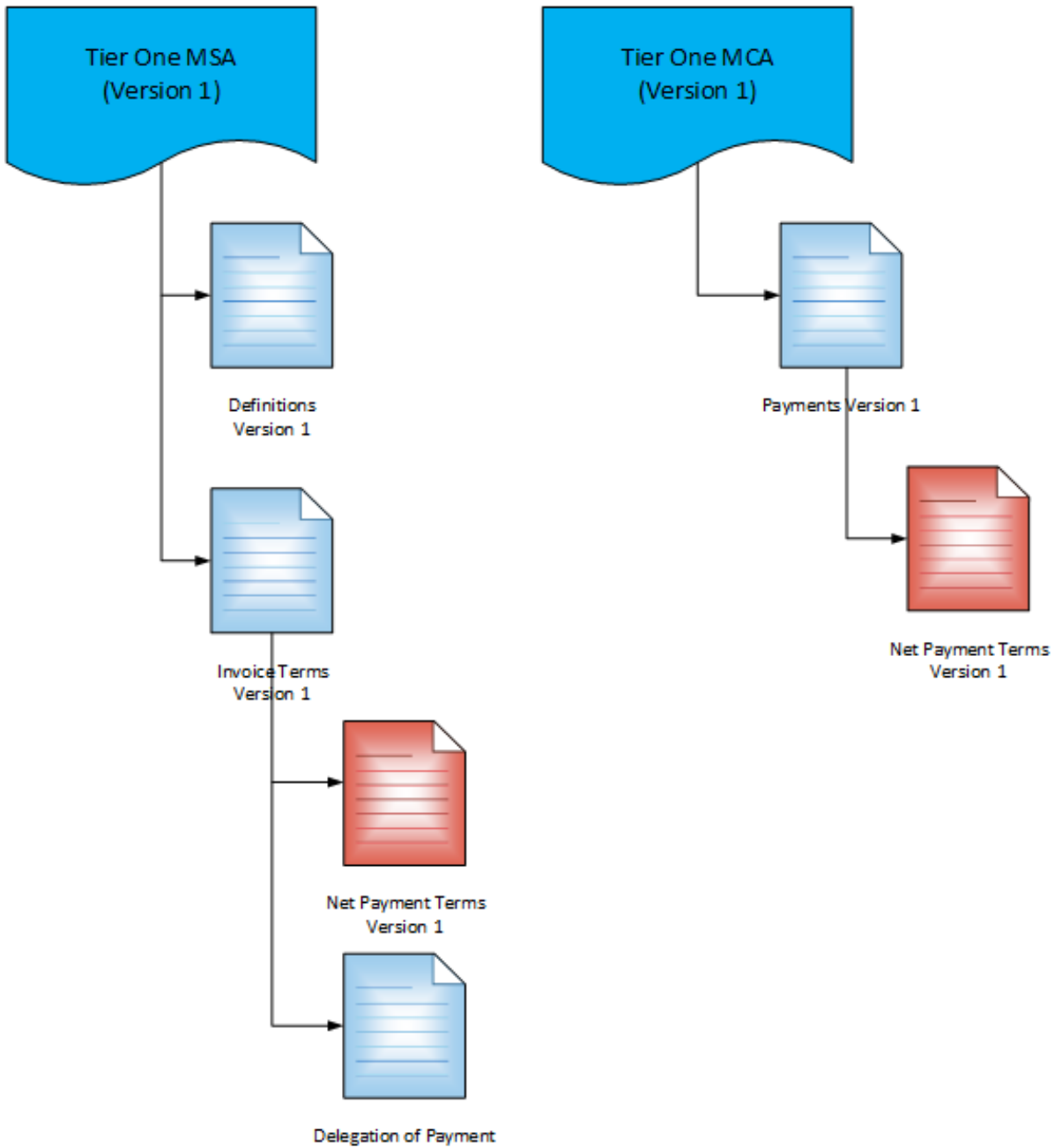
Sam is given instructions to update the Net Payment Terms clause to a Net 45 from Net 30 for MSA contracts only. Sam updates the clause to version 2.0 and activates it. This flags both parent clauses and master templates as "needs publishing." Because only the MSA contracts need to reflect the updated Net Payment Terms clause, Sam elects to publish just the MSA master template to a new version.

When the template is published, the Net Payment Terms nested in the MSA template, the Net Payment Terms clause, the MSA Payment Terms clause above it, and the MSA master template are all updated to version 2.0. MSA template 2.0 is now the active template

version. The MCA template is not published and still contains version 1.0 of the Net Payment Terms clause.
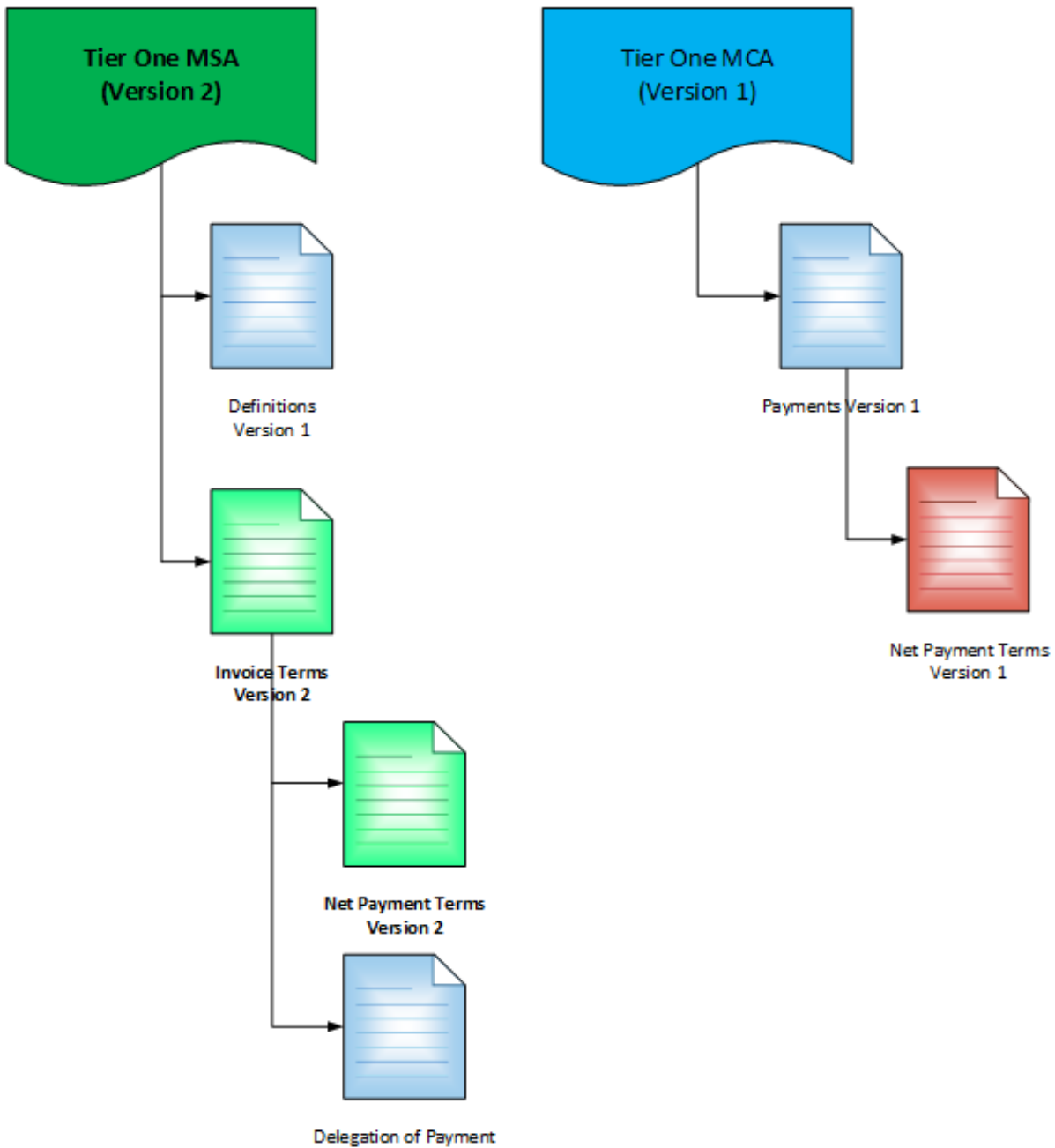
All MSA contracts using this template will now use the updated clause version.

Document Generation for Templates with Nested Clauses

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

The improvements to document generation resolve:

- Merge fields from agreement child or grandchild objects
- Merge fields within nested clauses

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

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

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

Publishing Templates

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

About Auto-Publishing

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

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

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

The new fields are:

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

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

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

Configuring Auto-Publishing

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

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.

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

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

Using Merge Service

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

- A username and password must be provided each time you publish, whether you are initiating an Auto (scheduled) or Manual run. The current session ID is not used, so the user may choose to log out during the process.
- Contract Management uses the AES-256 (Advanced Encryption Standard with a 256-bit key length) protocol.

- When the publish job is submitted, Contract Management calls Merge Service to initiate the publishing process.
- Merge Service does a complete cycle of publishing within each session. This includes fetching the template document and referenced clauses from Contract Management, in-lining the referenced clauses within the Template, and saving the published template document to the Contract Management template record.
- As each template publish cycle is completed, Contract Management updates the Auto publish job status regarding the template as completed, and initiates the next Merge Service template publish cycle. There is never any persistent data retained by Merge Service.
- Each template publish cycle is executed as a separate session with its own unique Session ID.
- When the last template has been published, Contract Management updates the job complete status.

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

Handling Auto Publishing Security Considerations

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

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

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

Security Handling Options

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

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

Query Template

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

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

Limitation

You cannot define more than 44 query templates. If you define more than 44 query templates, the Template Selection page that appears while generating documents does not display templates.

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.**

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.

Use Case for Creating Query Template

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

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

This use case describes how you can filter templates while previewing, generating or re-generating documents by using query template filtering. For example, if agreement templates are created for multiple regions, a user should only be able to select templates appropriate for the region they belong to.

In this case, a Sales Representative can select NDA English and NDA Spanish templates for generating or regenerating an agreement. The user has to manually select which template they want to use.

Prerequisite:

The Query Template will look for a match between fields on the Agreement and Template records. The Agreement record contains a **Language** field with the possible values of English or Spanish, while the Template record contains a similar **Language** field. By comparing and finding a match between the **Language** field values on the Agreement record and Template records, the Query Template will present the appropriate template for document generation.

To create a query template, perform the following steps:

1. Select the **Query Templates** tab.
2. Click **New.**
3. On the **Query Template Edit** screen, enter 1 as **Sequence.**
4. Retain all other default values and **Save**.
5. Click **New Query Template Qualifier** from the **Qualifiers** related list.
6. Enter 1 as **Sequence**.
7. Retain Agreement as **Object**.
8. Type **RecordType.Name** for the **Field** value.
9. Retain **Comparison Operator** as **equal to**.
10. Type **NDA-yourinitials** in the value field. This must be an exact match to your record type label.
11. Retain **Apttus__APTS_Agreement_c** in the SObject Type.

12. Click **Save**. Click QT-#### (top right of page) to navigate back to your query template record.
13. Click **New Query Template Filter** from the **Filters** related list.
14. Enter 1 as **Sequence**.
15. Type (or copy) **Apttus__Language__c** for the **Field** value.
16. Retain **Comparison Operator** as **equal to**.
17. Type (or copy) **Apttus__APTS_Agreement__c.Language__c** in the **Value** field.
18. Click **Save**.

Result:

When a specific language is selected on the agreement record, the associated template is automatically used for document generation.

Next Step:

Similarly, you can create query template for other languages, to generate your agreement for a specific region.

Securing Documents

Word Trust Center/Protected View options can impact your ability to see generated documents and should be disabled before you begin using X-Author for 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.

Prerequisites

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

To secure and control documents

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

Setting Up Template Filtering Rules

By setting up the template filtering rules, the Template selection page can be configured to set up 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 set up by an administrator and allows agreement fields and related child object fields to be used in selecting the templates.

The template selection page for the agreement generation actions displays only the templates that are applicable for the agreement. For example: For the Agreements of Type Other, show the templates that are defined for a region.

Setting Up Template Filtering Rules

1. Click ☐ and click **Query Templates**.
2. Click **New**.
3. To create a query template sequence, enter the Sequence (numeric). If there is more than one query template defined for a template object then sequence is the order in which the query templates are applied.
4. Enter the description for the query template and click **Save**.
5. To create a qualifier, click **New Query Template Qualifier**. *Qualifier* is as a condition on the Agreement object.
6. Enter the Sequence. If there are several template qualifiers, then the qualifiers are applied in the order of the sequence number.
7. Enter the API name of the agreement Field. For example, **RecordType.Name**.
8. Select the Comparison Operator. For example, **equal to**.
9. Enter the Value. For example, **Other**.
10. Click **Save**.
11. To define Query template Filter, click the associated query template link next to the Query Template. The Query Template Details page is displayed.
12. Click **New Query Template Filter**.
13. Enter appropriate values in the Sequence, Field, Comparison Operator, and Value fields and click **Save**.

Getting the ID of a Template Used to Generate a Document

1. Go to **Setup** > **Build** > **Develop** > **Custom Settings** > **Comply System Properties** > **System Properties** and click **Edit**.
2. Select **Publish Merge Events**.
3. After generate, select the rows in Merge Event based on agreement id & timing to get the template id.
4. Perform a query on the Template object and get the template information based on template id.
   The template ID is received.

About Universal Unique IDs

Universal unique identifier (UUID) fields of the agreement templates, clause templates, and term exceptions in Contract Management support the functionality available with the X-Author Migration Manager.

The UUIDs help provide the ability to update and migrate templates from one org to another. These IDs are unique and once an ID is assigned to a template or term exception object record, it cannot be changed.

To use the templates with the UUID field, you must have X-Author Contracts 7.0 or higher.

Setting Up Template Object for Contract Management

1. Click **+** > Customize My Tabs.
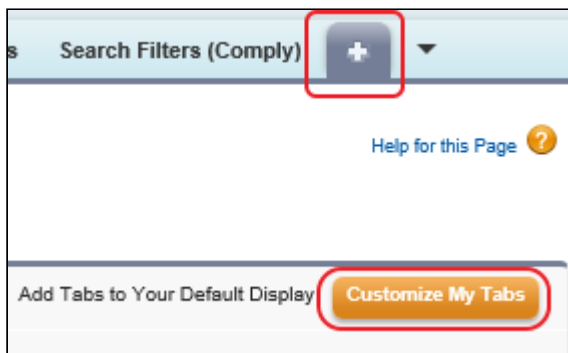
2. Scroll down the available options and select **Templates**.
3. Click **Add**.
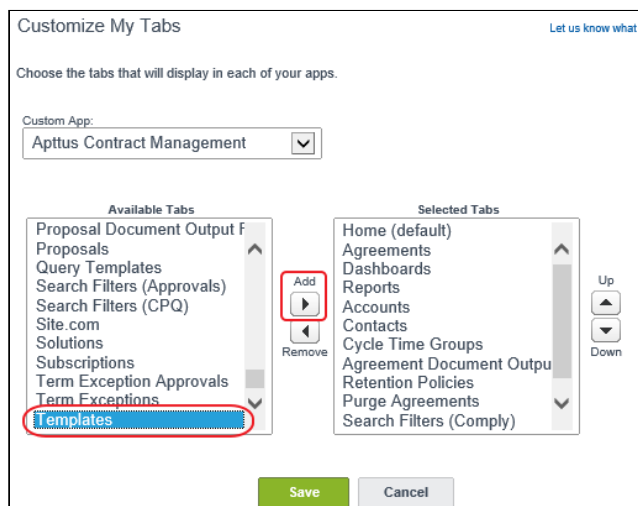
4. Click **Save**.

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

Document Generation Capabilities

The capabilities of Document Generation, or *DocGen*, are made completely visible in Conga CLM. Conga CLM has extended document generation beyond the *Agreement* and *Quote/Proposal* object to cover the standard Salesforce objects and custom objects.

The Conga CLM Suite uses the following components in the generation of documents:

- Conga CLM application is 100% native on the Salesforce platform – Includes custom objects, tabs, Apex classes and Visual force pages on the Salesforce platform.
- 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.
- X-Author for Contracts Add-in to Microsoft Word – A .NET-based add-in to Microsoft Word used for creating and managing merge templates and for generating and managing contract documents throughout the negotiation stage of the cycle.

Apttus Merge Service – Logic
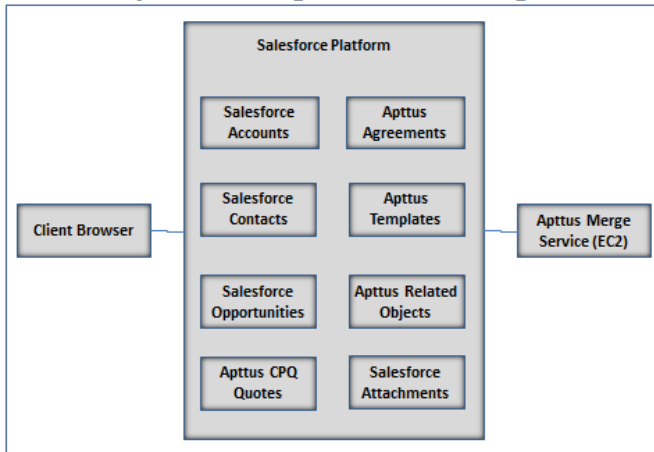
The following steps are performed during the document generation process:

1. The document generation process is initiated when you use the Conga CLM application in the following scenarios.
   - Select the document attributes, such as output format, protection type, and a template (including defined structured data fields in clauses with terms and conditions).
   - Click Generate for the supported objects. To view the list of supported objects, refer Document Generation Features List.

2. The Conga CLM application uses Apex code in Salesforce to make an HTTPS Web Service call to the Merge Service endpoint using the REST API .

3. The Apex controller passes to the 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 Merge Service which would capture the information, such as SessionId or agreement details, moving through the Merge Service.

5. The 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 Merge Service retrieves from the Conga CLM application the contract object record's user-selected Microsoft Word template and the data for the merge fields embedded in the template.

7. The 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 Merge Service since all data is stored only in Salesforce.
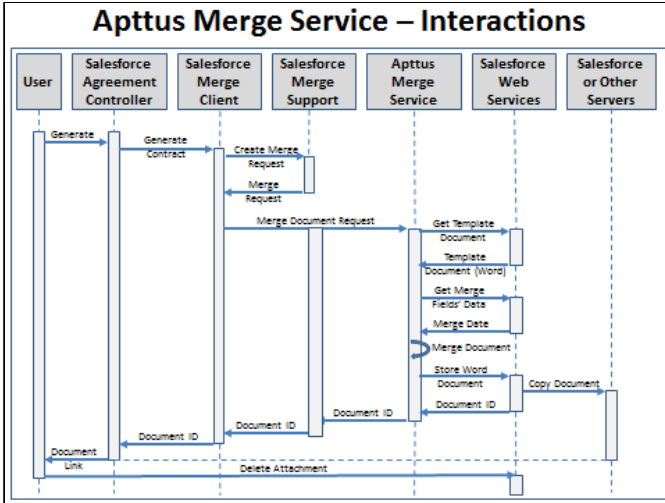
Document Generation Features List

The following table includes a list of functions that are related to document generation, or "DocGen". Each column in this table represents either the Agreement, Quote/Proposal, standard Salesforce, and Custom objects. While every function is completely supported for the Agreement object, there are limitations for the Quote/Proposal, standard Salesforce, and Custom objects.

This list is a representation of all document generation features by Object Type.

The following list is a representation of the notation used:

- X = supported out of the box
- NSP = not supported
- CSP - Comply System Properties
- PSP - Proposal System Properties

Note

The table below provides the required setup, if there is a necessary configuration for a document generation feature. In order to see what you must configure for a particular object, the configuration settings are noted under that corresponding object in the table.

For example, to use the *Merge Service Endpoint* feature for document generation on a custom object, you must configure *Remote Site - Salesforce Admin Setting* and *CSP Endpoint*.

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
1	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 documentation. *Admin - for backward compatibility	Setup 1 & 2	Setup 1 & 3	Setup 1 & 2	Setup 1 & 2

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
2	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 documentation. *Admin - for backward compatibility Max 60,000; Recommended 30,000	Setup 1	Setup 2	Setup 1	Setup1
3	Publish Merge Events Comply System Property > Publish Merge Events	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
4	Generation Document from Record Generate Action button setup: 1. Create an action formula field on the Object, and then add it to the layout. Refer to Generating on a Custom Object.	X	X	Setup 1	Setup 1

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
5	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) See **Enabling PDF Security on Generated Quote/ Proposal Document** in CPQ documentation.	Setup 1(a,b,c)	Setup 2 (a,b,c)	Setup 1 (a,b, c)	Setup 1 (a,b,c)

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
6	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

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
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
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

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
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 format Setup steps: • Comply System Properties > Auto Enable PDF Final Docs • Comply System Properties > Allow PDF Select Override	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
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

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
1 4	Create New Template & Check-In Template Setup #9 required prior	X	X	X	X
1 5	Check-out Template Setup #9 required prior	X	X	X	X
1 6	Clone Template Setup #9 required prior	X	X	X	X
1 7	Template Playbook: default Search, Select, Insert Clause inline or as a reference Setup #9 required prior	X	X	X	X
1 8	Insert Merge Fields for corresponding Objects - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	X	X	X

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
19	Insert Smart Merge Fields for corresponding Objects - Header - Lookups - Related - In Section - Related - In Table Setup #9 required prior	X	NSP	NSP	NSP
20	Document Assembly Rules Insert Dynamic Sections in X-Author for Contracts *Available for Agreement object only	X	NSP	NSP	NSP
21	Filtered Rows Apply Filter in X-Author	X	X	X	X
22	Conditional Content Make Conditional in X-Author for Contracts	X	X	X	X
23	Auto-publish	X	X	X	X
24	Generate. Output Format and add Watermark Support DOC, DOCX, PDF, RTF	X	X	X	X

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
25	Support Controlled Preferences for Output Format and Watermark *pairs: Record Type / User Profile 1. Agreement Output Format Tab 2. Proposal Output Format Tab	X	X	NSP	NSP
26	Check-in Third Party Document. Import Offline - Create record and attach	X	NSP	NSP	NSP
27	Check-in Third Party Document. Import Offline - Attach to existing record	X	NSP	NSP	NSP
28	Check-in Document, attachment of the record - With Redlines - Without Redlines - Final to be Signed - Watermark - Naming Override	X	NSP	NSP	NSP
29	Check-out Document, attachment of the record	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
3 0	Compare Documents, attachments of the record	X	NSP	NSP	NSP
3 1	Locking Refresh Lock	X	NSP	NSP	NSP
3 2	Create Section Save selection as Agreement Clause	X	NSP	NSP	NSP
3 3	Playbook: Insert Clause into the Document on the records	X	NSP	NSP	NSP
3 4	Reconcile Documents - Highlight Smart Fields - Reconciliation of the values	X	NSP	NSP	NSP
3 5	Tag Smart Fields	X	NSP	NSP	NSP
3 6	Update Document from Salesforce	X	NSP	NSP	NSP

	Setup required for a Feature	Agreement Object	Quote/ Proposal Object	Std. Salesforce Objects	Other Custom Objects
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

Generating on a Custom Object

Conga CLM 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. In this section, the Custom Object "Invoice" is considered in the examples.

Setting up Template: Object Type

Before you can generate on any object, it must first be associated with the Template object.

1. Go to **Setup > Create > Objects**
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Type**.
4. Under "Picklist Value Set", click **New**.
5. Enter the label name of the custom business object you want to associate with the template (e.g., "Invoice").
6. Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Setting up Template: Agreement Type

The next step requires you to create record types for your custom object.

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

Picklist Value Set

Action	Values
Edit | Del	NDA
Edit | Del	MSA
Edit | Del	Proposal
Edit | Del	RFP
Edit | Del	NDA -Instructor
Edit | Del	Pro Forma
Edit | Del	Credit Memo
Edit | Del	Debit Memo

Setting up Template: Business Object

Complete template setup by finalizing the association of your custom object with the template.

1. Go to **Setup > Create > Objects**.
2. Click on the link for the **Template** object.
3. Under "Custom Fields & Relationships", click on **Business Object**.
4. Under "Picklist Value Set", click **New**.
5. Enter the API name of your custom object as a new picklist entry. (e.g., "Invoice__c")
6. Click **Save**. On the next page, check the picklist values to verify your entries were saved.

Picklist Value Set

Action	Values
Edit | Del	Apttus__APTS_Agreement__c
Edit | Del	Apttus_Proposal__Proposal__c
Edit | Del	Invoice__c

7. Next, create associations between your new Business Object and template Types using dependent picklists. Go back to the **Template** object and click on the **Type** field.

8. Under "Field Dependencies," click **Edit** next to the "Business Object" dependent field.

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.

11. Click **Save** to save your dependencies.

Setting up Custom Object: Generate Action

The final step required to configure your custom object for document generation is to create the field or button on your custom object and add it to the object layout. Custom objects use a specific Visualforce page and controller class for generating documents. Pay attention to the format in the steps below. In the following example, a custom "Generate" field is created for the Invoice object. You can also make this a button or a link if you want–the action is controlled by a formula in every case.

1. Go to **Setup > Create > Object > Your Custom Object**. (this example is for "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**.

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")

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 X-Author for Contracts documentation to create and check-in your custom object templates for document generation. Remember that Rules and Document Protection are not supported for any object other than Agreements. The Generate flow for your custom objects will have a single step and resemble the page displayed in the below image.
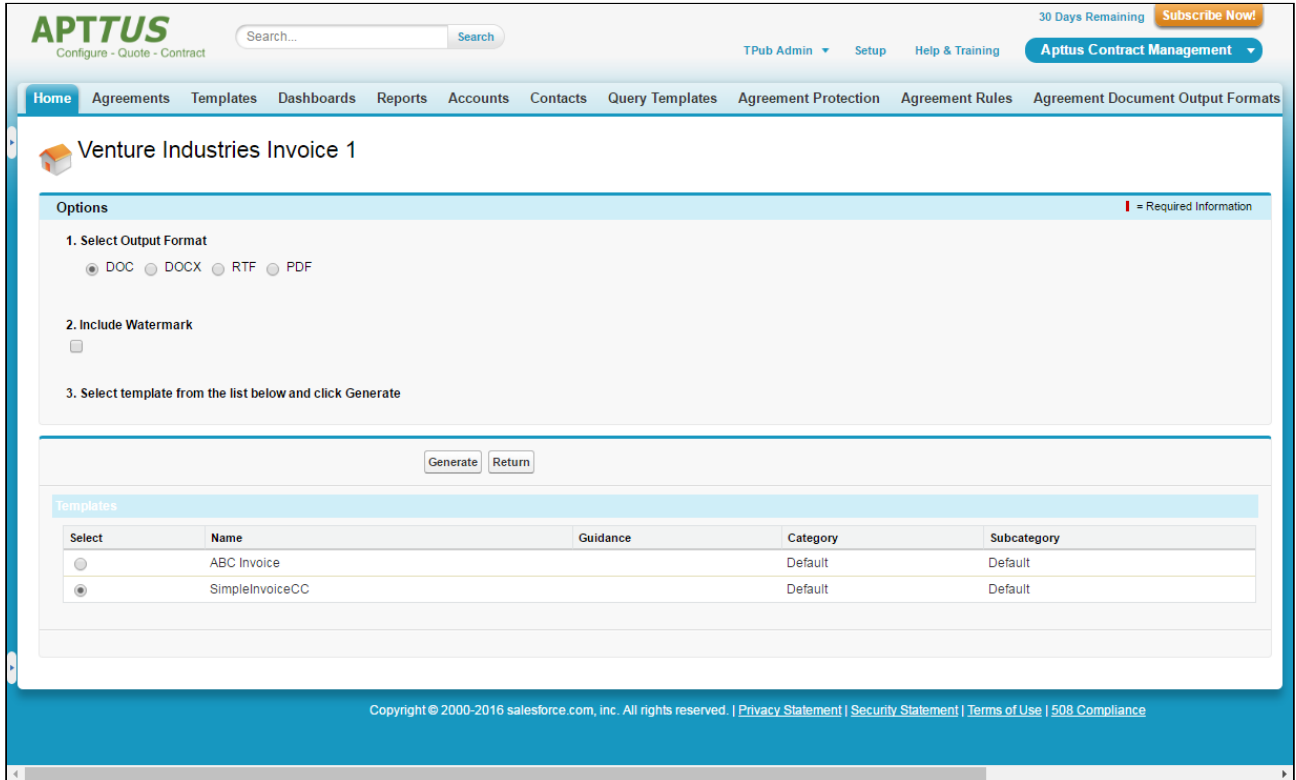
Agreement Document Output Formats

Documents are often set up 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 set up company-wide default formats to be used for generating documents, 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 checkbox shown in the setup UI. Supported formats are DOC, DOCX, PDF, RTF, and PDF/A. If you select the Prompt option, you will be prompted to select a format at the time of document generation/preview.

To set up an agreement output format

You must have the Apttus Administrator profile.

1. Click ✚ and click Agreement Document Output Formats.
2. Select a profile and click **Edit**.
   For example, Conga Administrator.

3. For agreement type, select the required output format option.

> ⓘ When you select the document format and any of the other settings at the <<Profile Level>>, it is saved as the setting for any record type where you select Prompt.
> The setting at <<Profile Level>> does not override record types where a specific format is selected as default.

4. To add or remove a watermark, select or clear Allow Override (Watermark).
5. Click **Save**.

You have configured the output-controlling parameters to generate an agreement document in a required format.

Use Case for Setting Up Document Output Format

This topic describes the use case for setting up document output format. This use case gives one example on how to set up default document output format for publishing your agreement. You might use this functionality differently, depending on your business case. In this case, a System Administrator configures the default document output format settings which allow users to automatically generate an agreement in the desired output format. In addition, Allowable Output Formats option, allows users to select a different format if necessary.This use case describes how to set up default document output format which fulfills users' specific needs.

Prerequisite:

You must have the System Administrator profile access permission.

To set up output formats for your agreement, perform the following steps:

1. Select the **Agreement Document Output Formats** tab.
   Setup **Agreement Document Output Formats** page is displayed.
2. Select **System Administrator** from the Select Profile drop-down list.

3. Click **Edit.**
4. Select **PDF** radio button, if you want pdf for the output document in the **Agreement Type Formats for Profile: System Administrator** section.
    Supported formats are PDF, PDF/A, DOC, DOCX, and RTF.
5. Click **Save.**

Result:

Your agreement record will display PDF by default when you preview, generated, and re-generate the document.

Next Step:

Similarly, you can set up other types of Agreement Document Output Formats based on your specific need.

Configuring PDF/A as a Document Output Format

You need to manually configure PDF/A as a document output format only if you upgrade to Summer '21 release or a later release. You need to add the PDF/A document output format in the Agreement Output Format object and the Allowable Output Formats field in the Agreement object.

To configure PDF/A as a document output format

1. Go to **Setup** > **Object Manager** > **Agreement** > **Fields & Relationships** > **Allowable Output Formats**.
2. Click **New.**
3. Enter *PDF/A* and click **Save.**
    When you navigate to the Agreement Detail page and edit the Allowable Output Formats field, you can see the PDF/A in the Available column.
4. Go to **Setup** > **Object Manager** > **Agreement Document Output Format** > **Fields & Relationships** > **Output Format**.
5. Click **New.**
6. Enter *PDF/A* and click **Save.**
7. Go to the Agreement Document Output Formats tab.
8. Select a profile from the Select Profile drop-down list.
9. Click **Edit.**
10. Select the **PDF/A** radio button for an Agreement Type according to your requirement.
11. Click **Save.**
    When you generate an agreement, regenerate an agreement, or generate a

supporting document, you can see PDF/A as an output format option.

Managing Alternate Clauses

Alternate clauses are substitutes for the main clause. You can create an alternate clause or change the clause type of the main clause in X-Author for Contracts. You can add alternate clauses as a substitute for the main clause. You can also replace the main clause in the agreement with an alternate clause.

Prerequisite

Ensure that you have created alternate and main clauses.

Restrictions

- You can add alternate clauses to the main clause, but you cannot add alternate clauses for an alternate clause.
- You must not create an alternate clause from CLM.

To add alternate clauses to the main clause

1. Navigate to the Templates tab.
2. Select a main clause.
3. Click the **Alternate Clauses** tab.
4. Click the **Select Alternatives** button.
5. Select the alternate clauses.
6. Click **Add**.

To remove an alternate clause from the main clause

1. Click the ▼ icon.
2. Select **Remove**.

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

Conga CLM 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

Conga CLM now allows you mark your agreement document as private.

Finalizing An Agreement

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

Routing Documents to Content Libraries

The Libraries tab has several publishing-related options at the top of the page that allows you to upload, classify, and publish files in the Salesforce CRM Content repository.

Managing Templates

Conga CLM 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. Conga CLM 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

Conga CLM 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. Conga CLM 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. Conga CLM 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

Conga CLM 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.
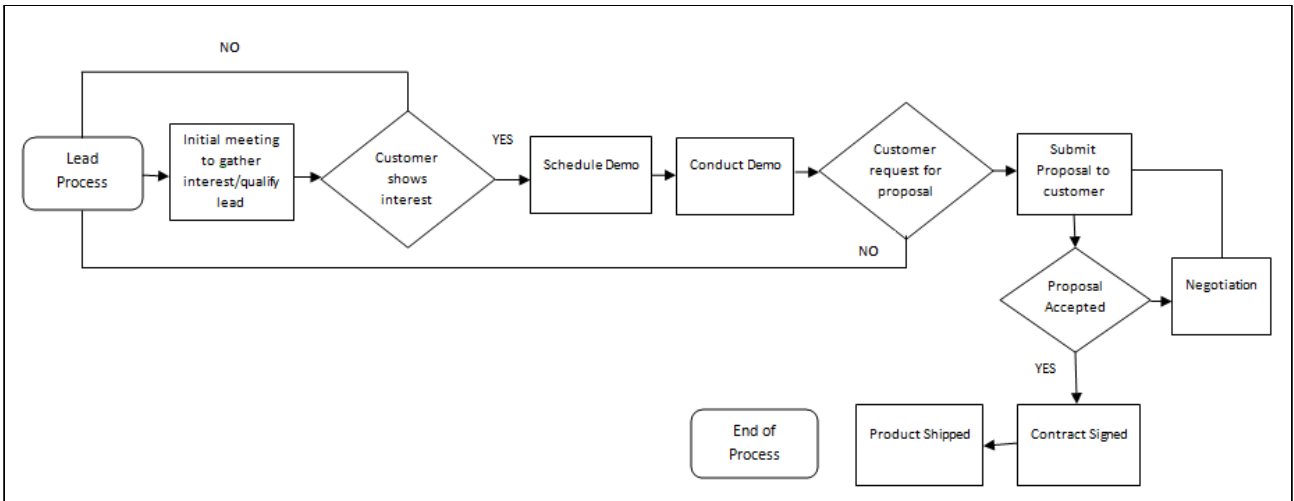
Agreement Actions and Corresponding Behaviors

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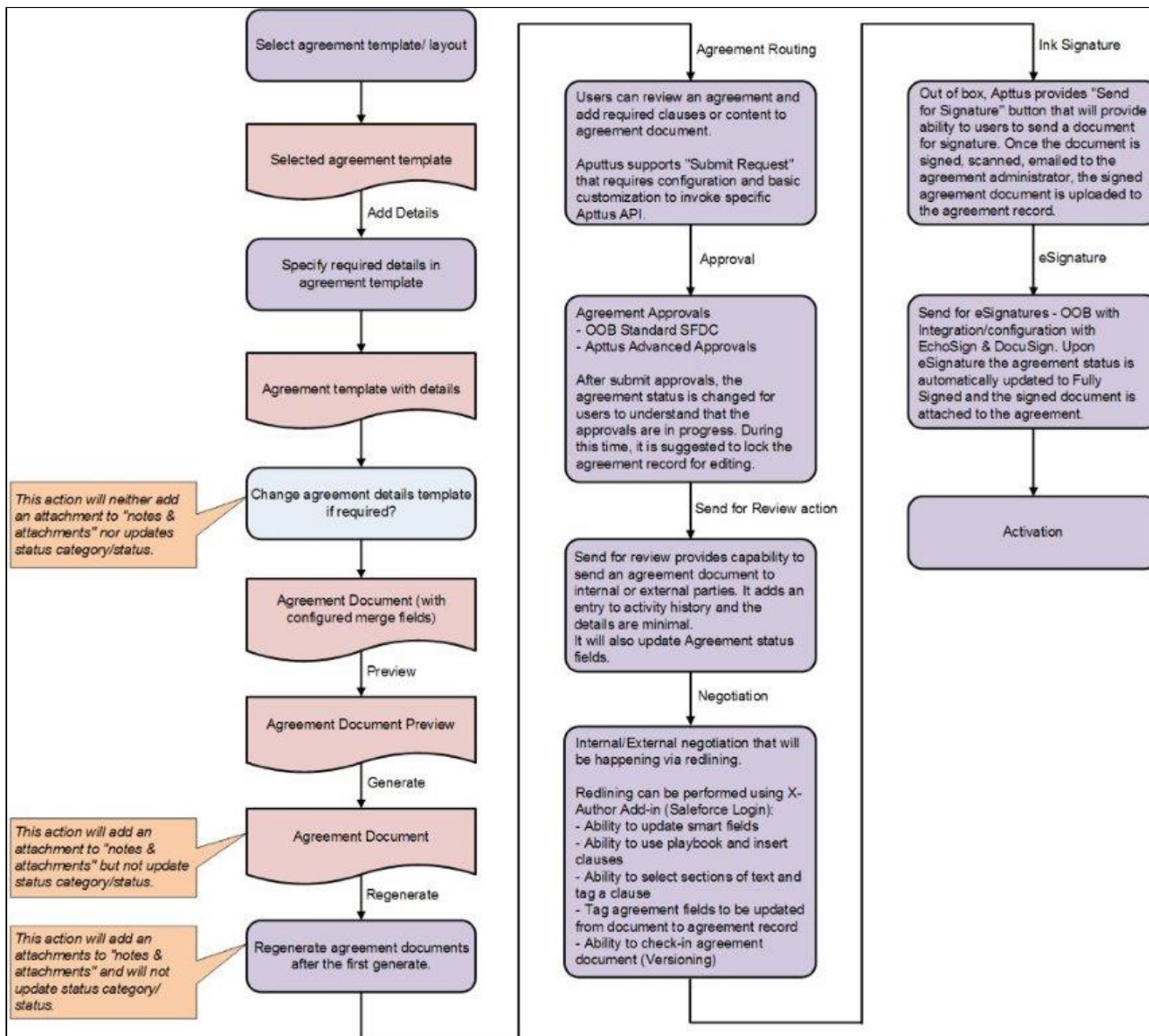
Requesting and Drafting an Agreement

Requesting for an agreement is the first stage of the contract management process. At this stage, users initiate agreements and find apposite documents. This capability is designed with the idea of having the contract requestor fill out necessary information around an agreement and have it auto-populated into the relevant Agreement template to create an Agreement Document for presenting to trading partner. For details, refer to CLM for Users.

- Setting Up Agreement Request Process

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

- Setting Up Rule-based Agreement Request Process Parameters

  The Agreement Request process requires parameters to identify the Auto Agreement

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

- Drafting an Agreement

  While drafting an agreement, Conga CLM can accommodate any Agreement template type (Sales, Procurement, Services, Intellectual Property, etc.). The Out-of-the-box system does not have default Agreement types.

Setting Up Agreement Request Process

Setting up an agreement request process enables the default process for managing and fulfilling Agreement Requests submitted by Requesters. The following are the examples of a typical agreement request process.

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

To set up an agreement request process

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

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

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

The defaults specified in the above code is:
- Agreement Template = ComplyAgmtTemplate
- Agreement Type = Other
- Email Template(sent when standard or self service contract is generated by system) = Agreement Review Notification
- Queue to which request is sent in case of request for Non Standard Agreement = Reviewers

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

ⓘ
- Ensure that the default values in the above code piece are replaced with values applicable to your implementation, if necessary.
- A sample SubmitRequestConfigSampleXML file is in the Static Resources as part of the standard Conga CLM. 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.

Parameters	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 parameter 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.
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.

Parameters	Description
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: ReadTemplate: Read

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

3. Select a mandatory Rule Type and enter a correct Rule Value. For example, if you select Queue Assignment as Rule Type, enter a valid Queue name for Rule Value.

4. Select the Active check box to activate an agreement rule.

> ⓘ By default, the Active check box is selected.

Inclusion Criteria and Filter Criteria sections for an agreement rule are optional, so you may skip Step 5 and Step 6.
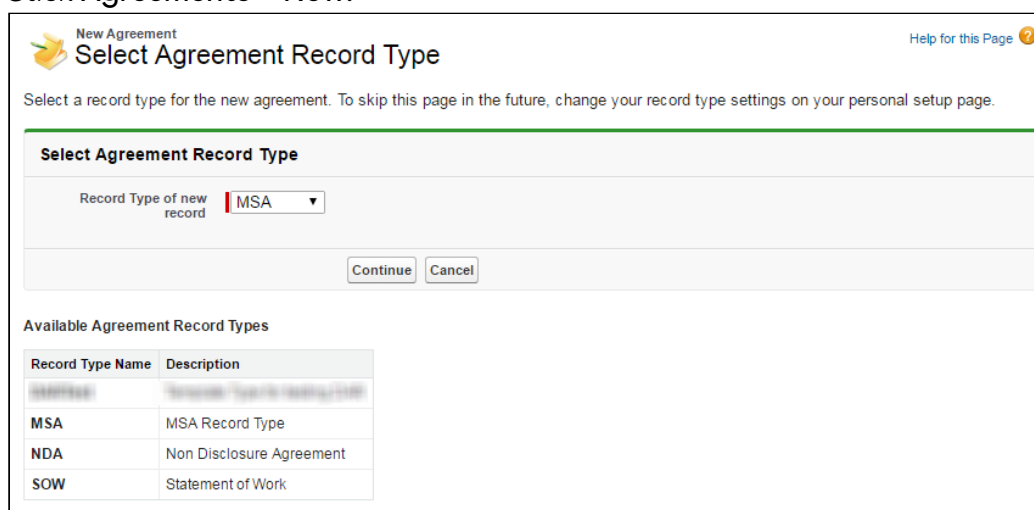
5. In the Inclusion Criteria section, select the field and expression you want to use as entry criteria for the filter. For example, if you want to use agreement records of MSA record type, it can be included in the Inclusion Criteria.

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

7. Click **Save.**

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

Drafting an Agreement

You must set up the agreement type. Conga CLM 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.**

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

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

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

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.

> ⓘ 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).

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 Section	Description
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. ⓘ 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 - User Permissions

Conga CLM enables you to generate an agreement using an existing template.

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

Templates can be created using X-Author for 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 for Contracts, see X-Author Contracts documentation.

Configuring Columns in the Template Selection Page in Lightning

In the Template Selection page, you can configure the template attributes that must be displayed as columns in the template selection section available when you preview documents, generate documents, regenerate documents, and generate supporting documents. By default, Name, Guidance, Category, and SubCategory template attributes are available. You can add as many columns as required. The order of the columns is determined by the order of the template attributes in the field set.

To add columns in the template selection page

1. Navigate to the **Template Object** > **Field Sets** > **Template List Field Set**.
2. Drag and drop template attributes In the Field Set section.

3. Reorder the template attributes in the order that must be displayed in the Template Selection section.
4. Click **Save**.
   When you navigate to the Template Selection section, you can view the new columns appear in the configured order.

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 the negotiation

You can secure documents during the negotiation cycle.

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

- Amend and save agreements/proposals in Salesforce
- Highlight reconcilable data
- Reconcile agreement/proposal records
- View chatter feeds from within Microsoft Word
- Share content and document to Salesforce Chatter

- Translate agreement/proposal documents from one language to another
- Create reminder tasks or schedule appointment events in relation to the opened agreement/proposal document
- Redline and store versions of the document during negotiations
- Compare different versions of agreements/proposals side by side

To create and negotiate an agreement, the X-Author Contracts Word add-in is designed for agreement administrators and legal users to help streamline the process of maintaining agreements and associated agreement and clause templates. Using the X-Author for Contracts, agreement administrators can manage complex negotiation cycles, clause and agreement template easily.

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 Conga CLM. Finally, users can compare versions of an agreement document.

For details on the X-Author for Contracts functions, see X-Author for Contracts documentation.

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 X-Author for Contracts**.**
4. Login with your credentials.

> ⓘ 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 Contracts section in X-Author for Contracts documentation.
> **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 Conga CLM 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 Conga CLM 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 Conga CLM, 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.

ⓘ 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.

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

ⓘ 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 browser. This action updates the agreement version in the repository and activity history.

Go to X-Author for 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

Conga CLM provides two solutions for tracking the clauses used in your agreement documents.

- Tracking Agreement Clause Activity – Track Agreement Clause activity using the Agreement Clause Related list. Whenever an agreement clause is inserted, modified or deleted during negotiation, agreement activity is recorded in the list at check-in and reconciliation. Use this data for reference or reporting purposes to track how non-standard language changes over the lifecycle of an agreement. *This is the default means for tracking clause activity in your agreement.*

- Tracking Agreement Clause Versions – Add the **Master Clause Listing** section to your agreement layouts to provide a comprehensive list of clauses referenced in the current/final agreement document, from first check-out to activation. Drill down into each clause listing to view a list of all Clause Iterations present in the document throughout the negotiation, as well as **Clause Iteration Details**. Generate reports on agreements that contain specific clauses or clause language.

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

Tracking Agreement Clause Activity

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

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

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

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

Agreement Clause Records

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

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

> ### ⓘ Note
>
> If you are using Conga CLM **8.359** or higher with X-Author for 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*. • 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.

Actions taken on the Clause before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
After checking out the same document, you make changes to the clause content.	"Housing Rent Allowance" is changed in a session after it has been inserted.	No update to the Agreement Clause related list.	Creates a single record in Agreement Clause related list with **Action** as *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.
- 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
    - Use Case: Clause Versioning Scenario (SOW)

Adding Master Agreement Clauses to the Agreement Layout

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

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

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

2. Under Page Layouts, click the **Edit** link next to the layout you want to modify.
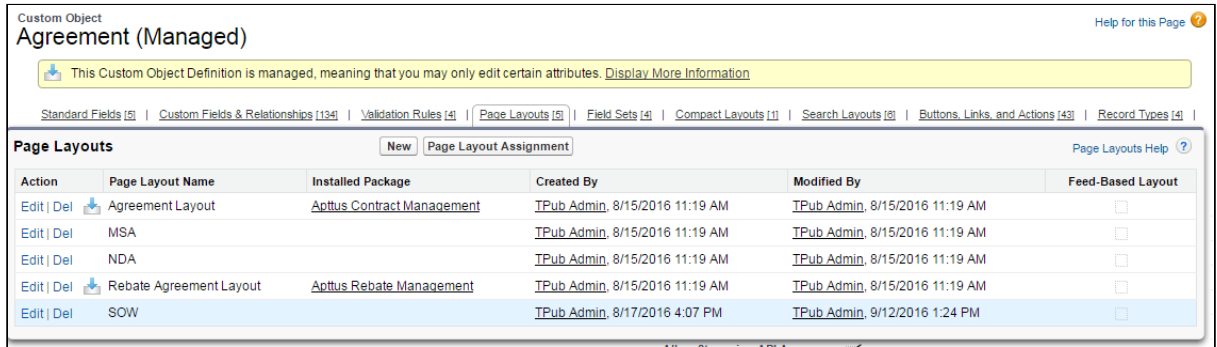
3. Drag-and-drop the **Section** field onto the area below the Actions section of the Agreement layout.
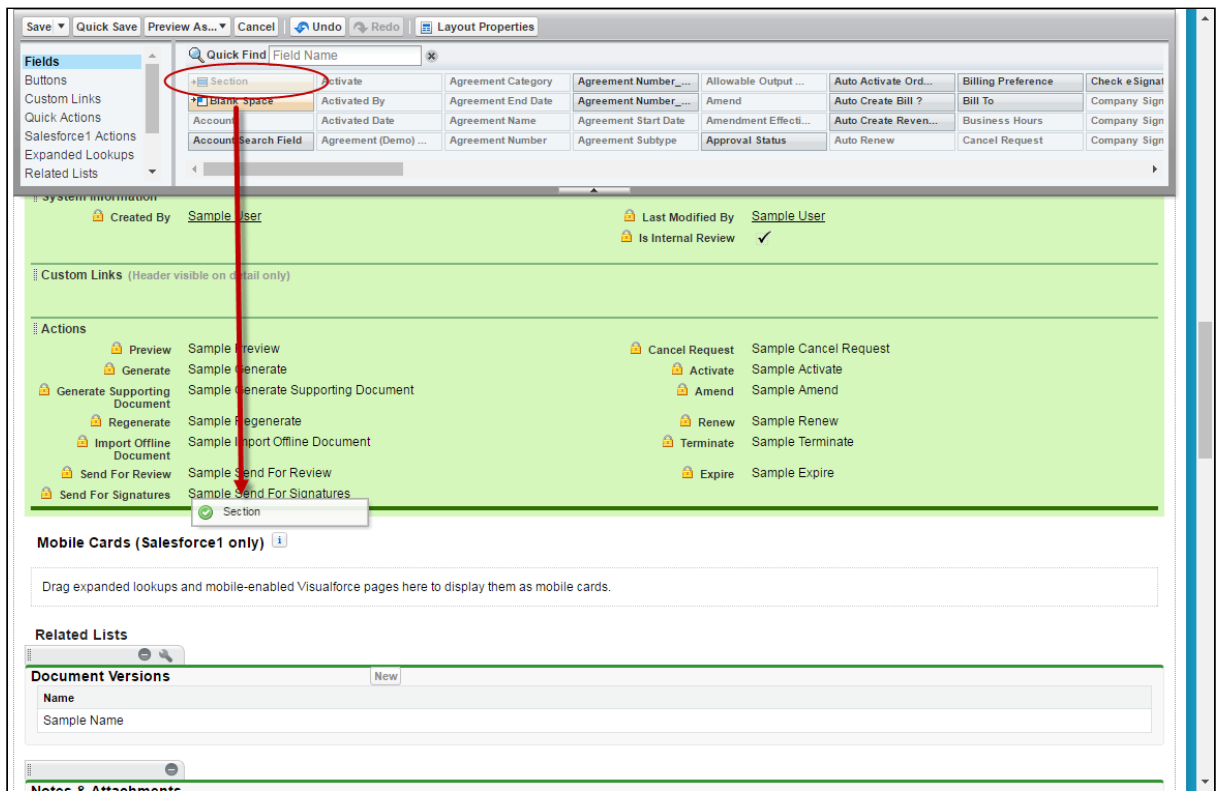
4. Enter **Agreement Clauses** as the section name and choose a **1-Column** layout.
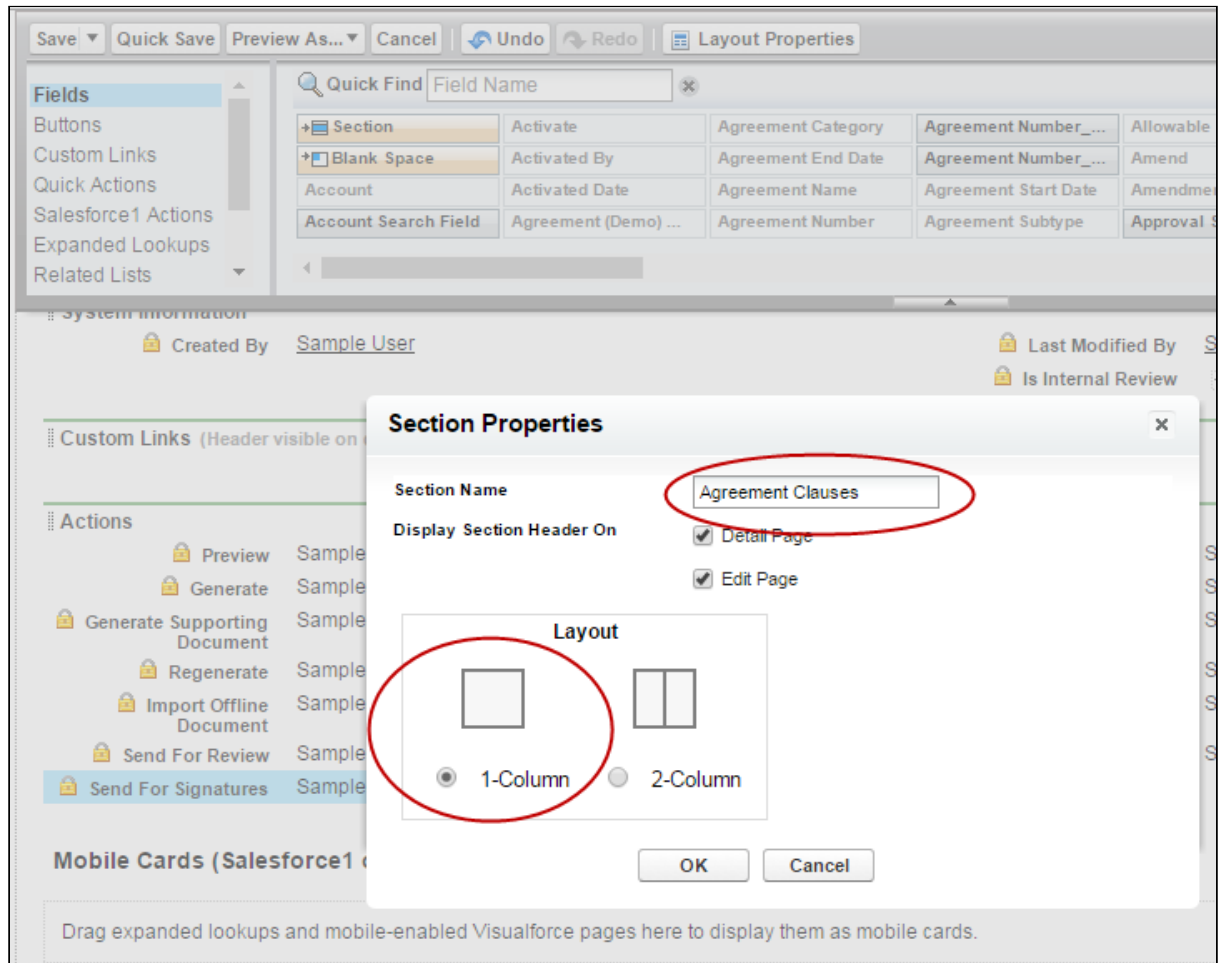
5. Click **OK**. The Agreement Clauses section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.
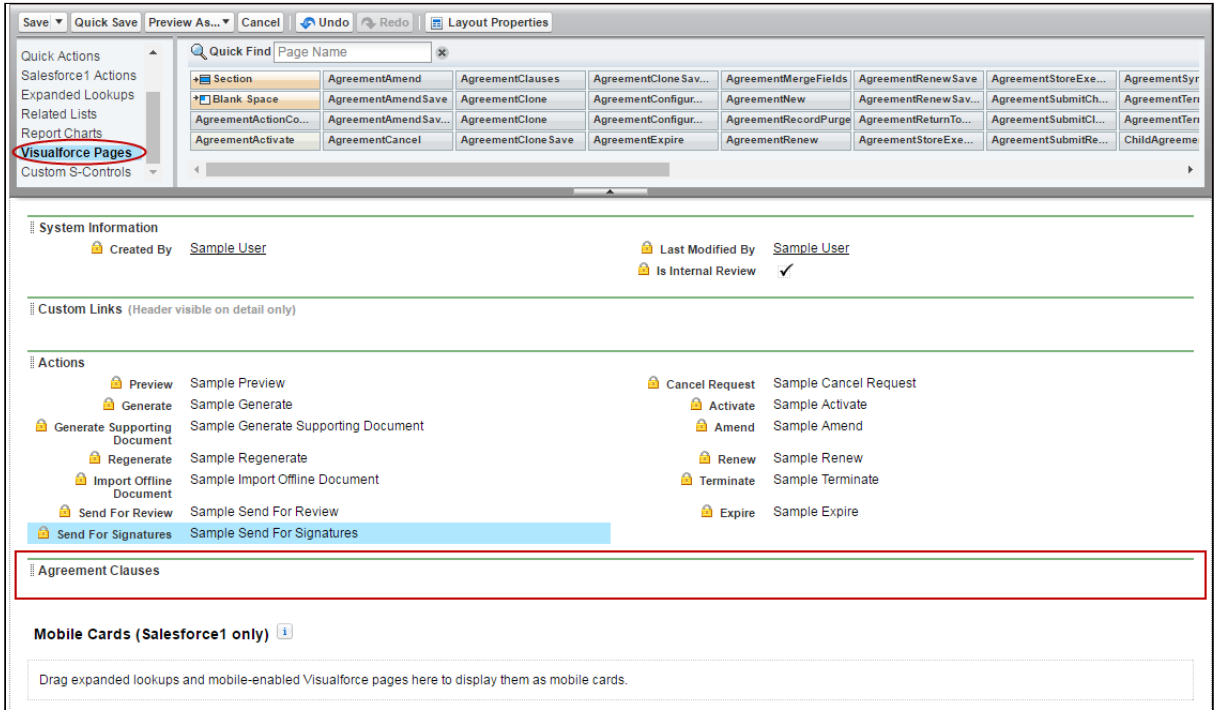
7. Drag-and-drop the **AgreementClauses** Visualforce page onto the section you just created.
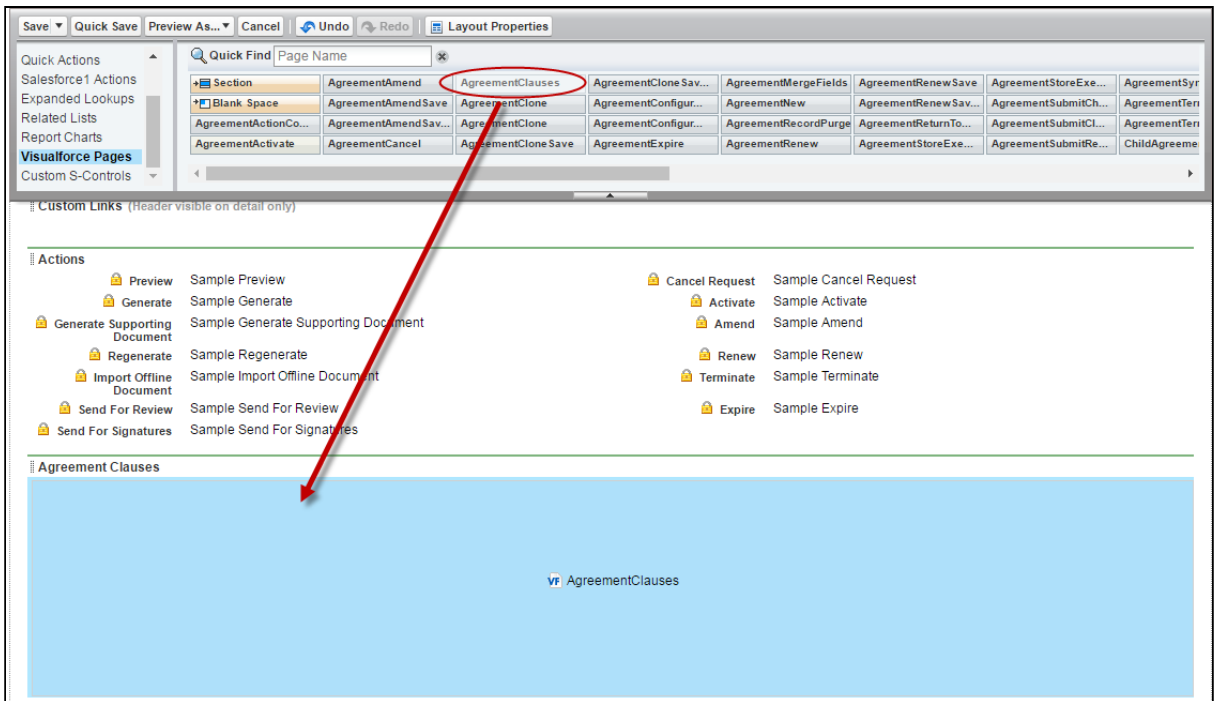
8. In the upper-right hand corner of the AgreementClauses section, click the ✎ icon to change the Visualforce Page Properties. Select the **Show scrollbars** option and click OK.

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.

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).

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

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

How Clause Iterations are Recorded

Two factors determine how clause activity is recorded during negotiation:

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

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

Initial Session (1st Check-Out)

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

Clause Actions before Check-In	Example	At Check-In without Reconciliation	At Check-In with Reconciliation
After inserting a clause using Playbook or Mark Clause, you make changes to the clause content.	Contract negotiator changes a warranty period from 1 year to 2 years in the same session "Housing Rent Allowance" is inserted.	Creates a single record in Master Agreement Clauses & Clause Iterations with **Action** as *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

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.

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

Use Case: Clause Versioning Scenario (SOW)

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

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

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

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

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

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.

After negotiation concludes, Mary checks in the document as "Final - to be signed," and reconciles it. 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.

Controlling Access Permissions for Agreements

Contract Management now allows you to mark your agreement document as private from Conga CLM.

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 Professional Services to develop a solution for your private documents.

Private Indicator Properties

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

- **Auto Enable Private Indicator** – When this property is enabled, the **Make this document private** 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.

Auto Enable Private Indicator	Allow Private Selection Override	Available Action
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 for Contracts documentation.

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. Conga CLM 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 that are configured when libraries are created.
- Users can subscribe to specific libraries to get notifications when content has been changed or added.

To publish activated agreements to the Salesforce CRM content repository:

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

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

Installing Apttus Content Integration

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

Enabling Salesforce CRM Content

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

1. Go to **Setup > Customize > Salesforce Files > Settings > Salesforce CRM Content** or enter "Salesforce CRM" into the Quick Search dialog and select **Salesforce CRM Content.**
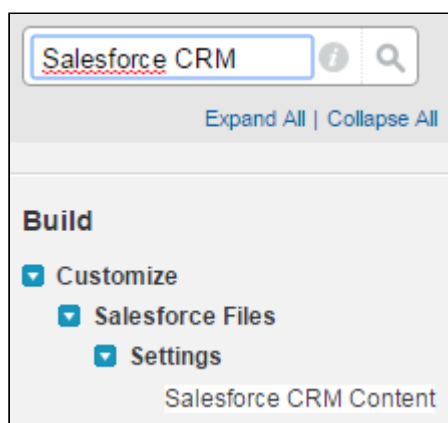
2. Click **Edit** on the Salesforce CRM Content page and select **Enable Salesforce CRM Content** and **Autoassign feature licenses to existing and new users.**

3. Click **Save.**
4. (Optional) Go to **Setup > Customize > Salesforce Files > Settings > Content Deliveries and Public Links.**
5. Click Edit and select **Content Deliveries feature can be enabled for users** and **Public Links can be enabled for users.**
6. Select Choose password defaults option per your requirement.

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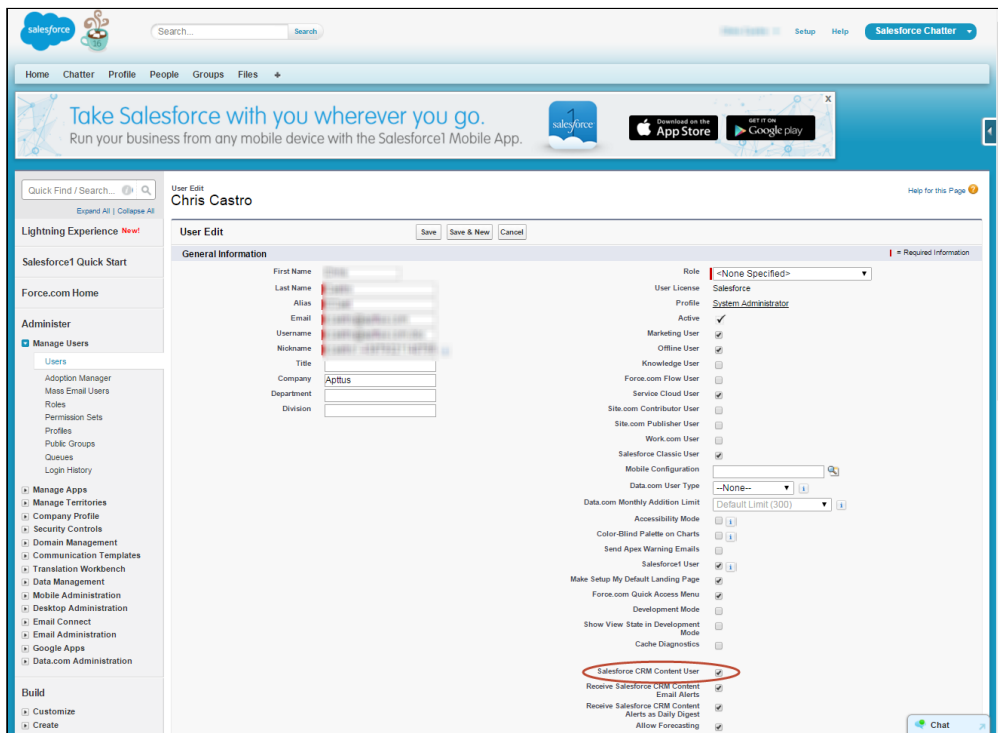
Configuring Admin Properties

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

1. Go to the **Admin** tab (click '+' and choose the Admin tab.) Click **Go** to view all Admin objects (your list will vary depending on which objects have already been created).
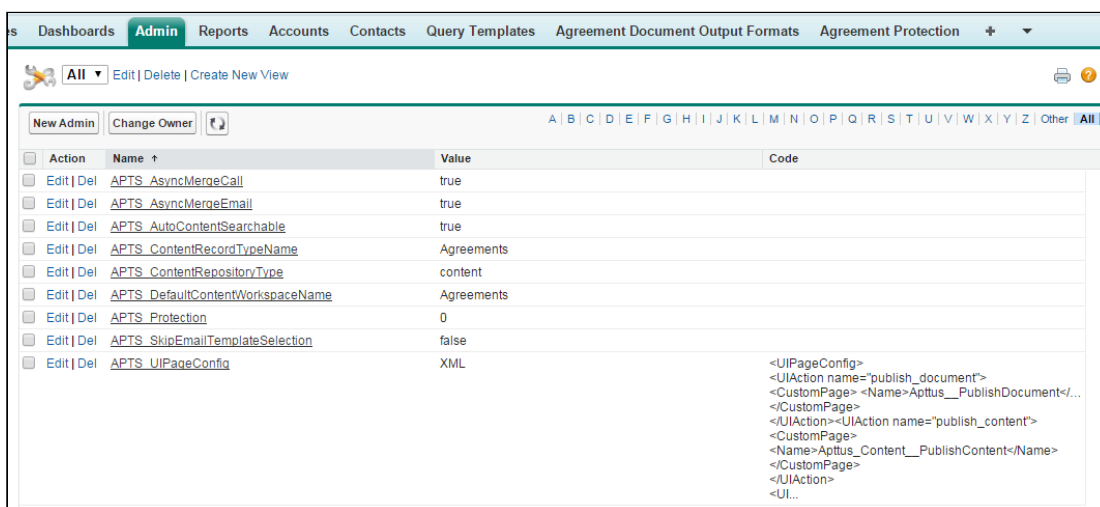
2. Create the following four Admin properties to enable content delivery for your activated agreements. Set values as required:

- **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 that 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_document">
<CustomPage> <Name>Apttus__PublishDocument</Name>
</CustomPage>
</UIAction><UIAction name="publish_content">
<CustomPage>
<Name>Apttus_Content__PublishContent</Name>
</CustomPage>
</UIAction>
<UIAction name="publish_chatter">
<CustomPage> <Name>Apttus__PublishChatter</Name>
</CustomPage>
</UIAction>
</UIPageConfig>
```

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

i. Copy the XML contents from the ContentConfig static resource into your new Admin Object (APTS_ContentConfig).

ii. Any custom fields you add to the Content Version object and layout (detailed in the next section) which you want to be displayed in Content Version details for any stored agreement document must be mapped as part of this Admin property.

For example, if you want the values of the Account and Opportunity for the document's related Agreement automatically added to Content Version details, you would create the Admin Object and code as shown in the following image:

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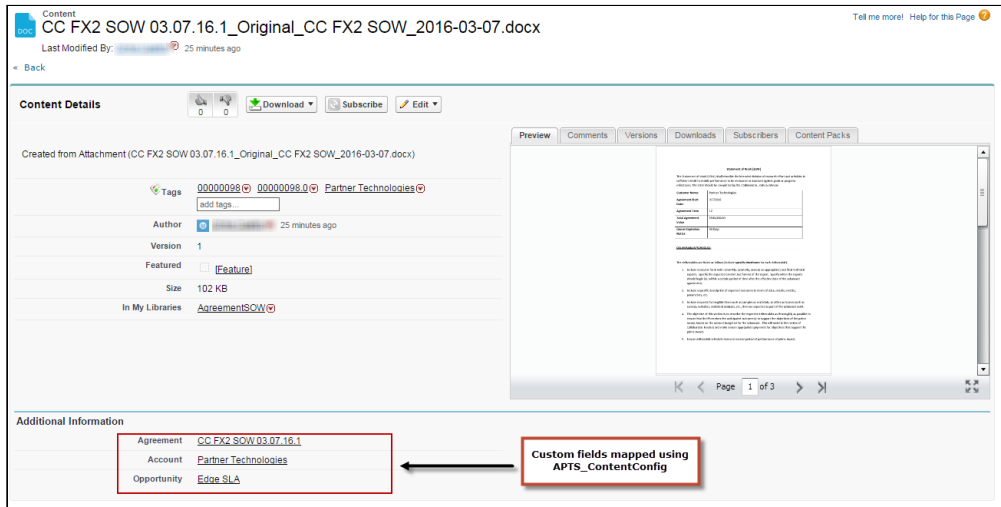
Setting Up Salesforce Files for Content

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

Configuring Content Permissions for Libraries

You can define content permissions for managing your libraries. Each library's 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.

Adding Custom Fields to the Content Version Object

To properly view information and navigate to your contract repository from the Content Versions related list on your Agreements, you must add "Agreement" as a custom lookup field to the Content Version object. The following configuration is required for configuring email agreement documents if you have installed the Apttus Content Integration package and if you have not created a lookup field for Agreement object.

1. Go to **Setup > Customize > Salesforce Files > Fields.**
2. Click **New** in the Custom Fields & Relationships related list.
3. Choose the type of field to create, and click **Next**.
4. For relationship fields, associate an object with the field and click **Next**.
5. Enter a field label. The field name is automatically populated based on the field label you enter.

   > ⓘ The field name can contain underscores and alphanumeric characters and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Ensure the custom field name is not identical to any standard field name for that object.

6. Choose the page layout that should display the field as an editable field.

> ⓘ 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.
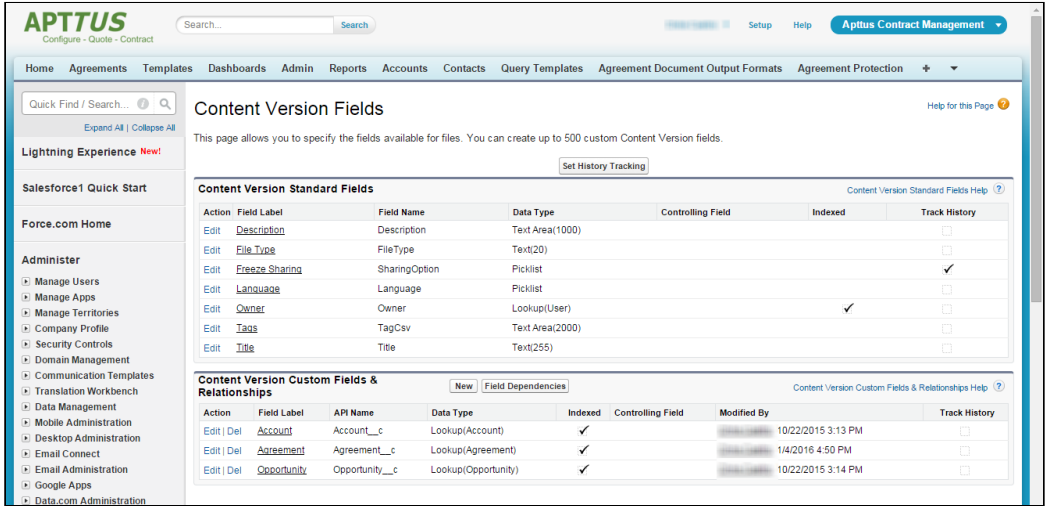

Assigning Custom Fields to Page Layouts

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

1. Go to **Setup > Customize > Salesforce Files > Record Types**.
2. Click **New** to create a new record type with its own Library Content Version Layout.
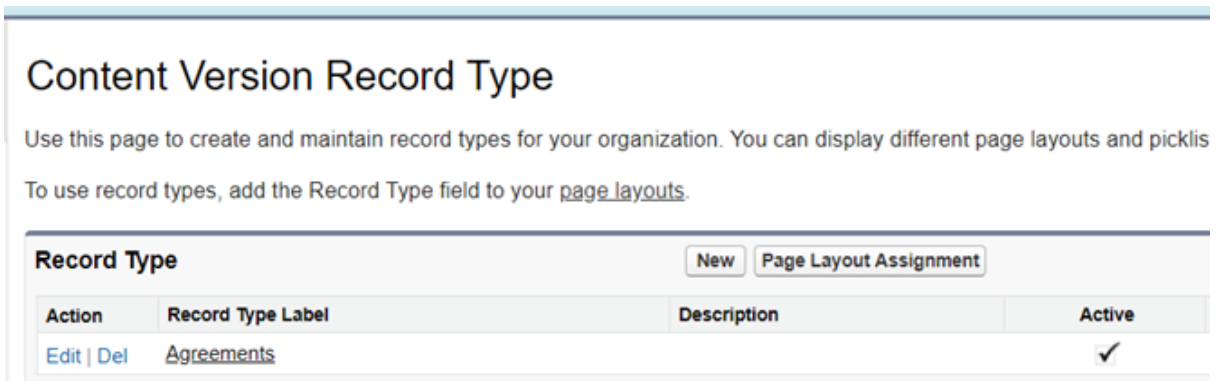
3. Create the record type "Agreements" and assign it to profiles you want to give access to Content Version data.
4. Ensure that you select the Active checkbox.

5. Repeat steps 2 – 4 to create additional Content Version Record Types as needed.

6. Go to **Setup > Customize > Salesforce Files > Page Layouts.**

7. Click **New** to create a custom layout and name it "Agreements."

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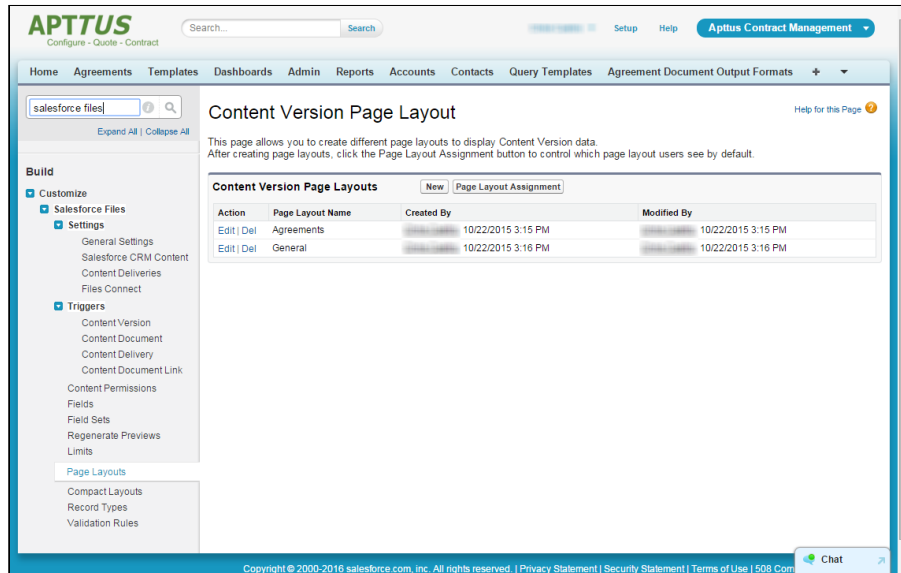
9. Add the new Agreement lookup field and any other Content Version fields you want to add to the General layout.

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

Configuring the Libraries Tab

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

1. Go to the **Libraries** tab (click + and click **Libraries**).
2. From "My Libraries," click **New** to launch the New Library Wizard.

New Library Wizard   ✕

Step 1 of 3: Define Library Information

❙ = Required Information

Name	Agreements
Unique Name	Agreements
Description	Repository for activated agreement documents

[Save and Close]   [Save and Add Members]   [Cancel]

3. Enter the name you want to use for your library (e.g., "Agreements") and a description (e.g., "Repository for 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.

Edit Tagging Rules   ✕

Update the tagging rules used in the library. Your selection determines which tags users can add to content.

❙ = Required Information

🔘 **Open Tagging**
   Allow authors and editors to enter their own tags.
⚪ **Guided Tagging**
   Allow authors and editors to enter their own tags or choose from suggested tags.
⚪ **Restricted Tagging**
   Allow authors and editors to choose suggested tags only.

[Save]   [Cancel]

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

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.**

Configuring Library Permissions

1. Go to **Setup** > **Customize** > **Salesforce Files** > **Content Permissions**.

2. Click the **Edit** action for the **Author** Library Permission Name. Ensure that the following permissions are selected:

3. Click the **Edit** action for the **Viewer** Library Permission Name. Ensure that the following permissions are selected:

4. Click the **Edit** action for the **Library Administrator** Library Permission Name. Ensure that the following permissions are selected:

5. Go to the Libraries tab.
6. From "My Libraries," click on the library name.

7. Click **Edit Members** to choose which members have access to this library.

8. Add a user and 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.

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

Using Agreement Rules to Route Content

One of the advantages to setting up Content Libraries for your activated agreement documents is the ability to develop agreement rules to route your content to specific libraries. By default, when you have content repositories configured your content will all route to the default content library. You can create additional libraries and rules which

send your documents to these libraries based on the criteria you define. Follow the instructions in this section to set up Agreement Rules for content delivery.

Setting up a Formula Field on the Agreement Object

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

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**.

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

Extending the Agreement Rule Object to Include Content

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

1. Go to **Setup > Create > Objects** and click on the **Agreement Rule** object.
2. Under Custom Fields & Relationships, click on the **Rule Type** field.
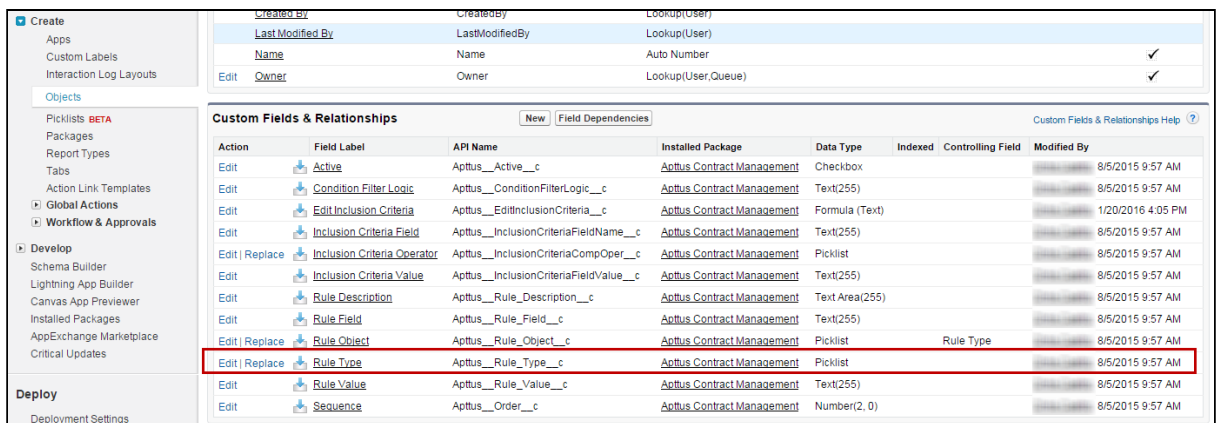
3. Scroll down to Picklist Values for the field and click **New**.
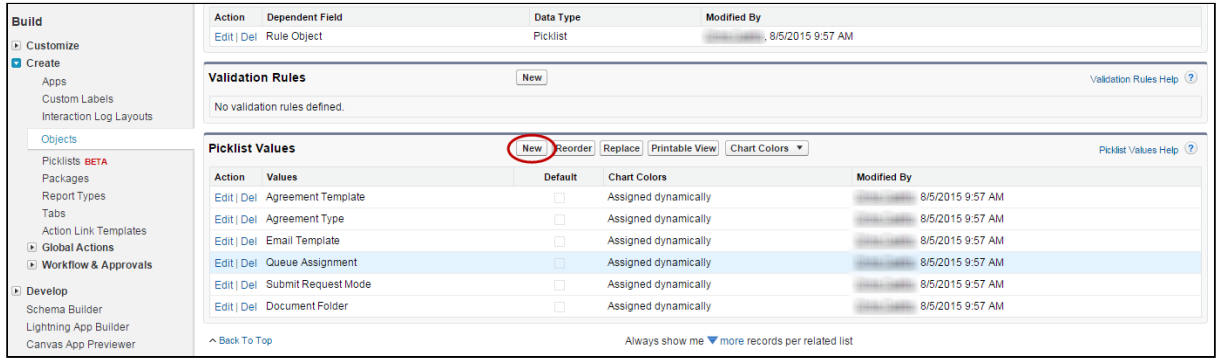
4. Add the picklist value "Content Workspace" and click **Save**.
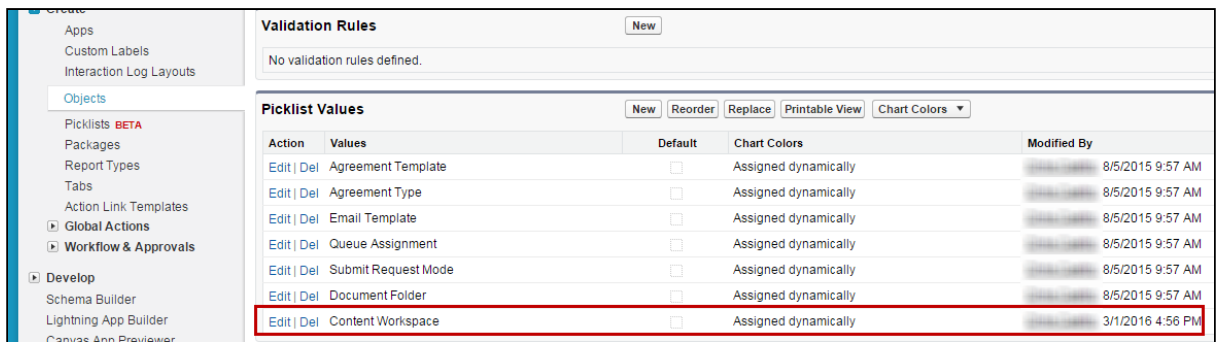
5. Return to the Agreement Rules Object Details page and click on the **Rule Object** Custom Field.
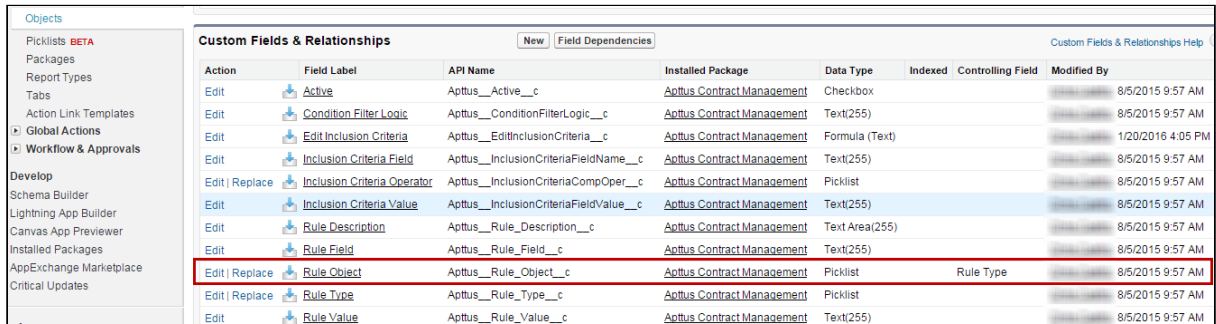
6. Add the value "Content" to the Rule Object picklist.

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**.

10. Click **Save**.

Creating a Content Workspace Agreement

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

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

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

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

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

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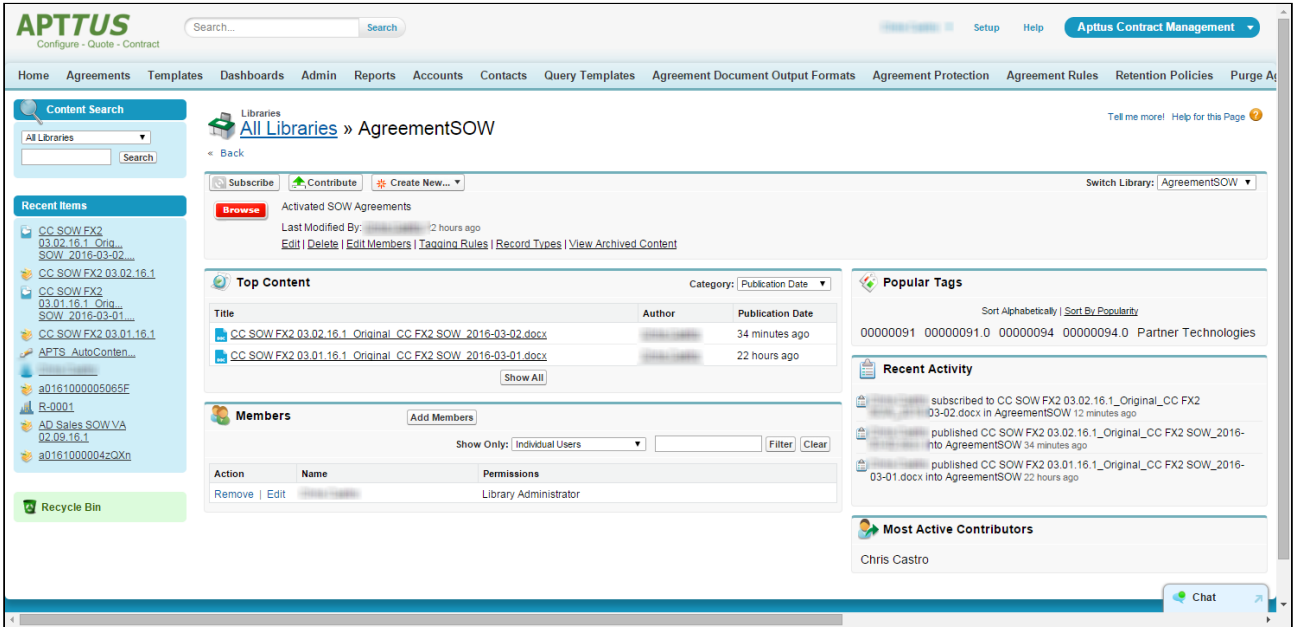
You can also search for your activated agreements by going to **Content**.
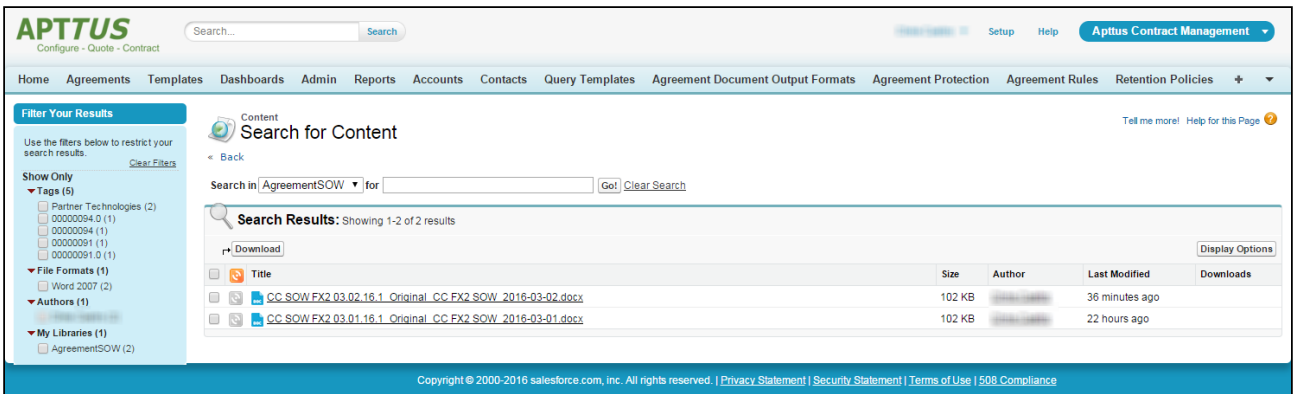
Content Versions Related List

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

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.

Managing Offline Agreements

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

Conga CLM along with intelligent data extraction software enables you to run intelligent discovery on a third-party paper. The intelligently imported third-party paper is scanned by the optical character recognition method and converts the document to a searchable PDF.

> (i) This documentation is created considering Kira and Conga AI as intelligent data discovery software.
> Intelligent Discovery features need add-on licenses. Please get in touch with Conga Support for more information.

For information on creating an offline document using intelligent discovery, see Working with Offline Agreements.

Prerequisites

Kira is an intelligent data extraction software that enables you to intelligently import a third-party paper into Conga CLM. Before configuring Kira with Conga CLM, review the following topics:

- Terms of Service
- Response Data and Rate Limiting (you need to have Kira credentials to access this page)

> (i) Ensure you delete previously scheduled jobs related to Intelligent Discovery. If you do not delete previously scheduled jobs, duplicate extractions are visible.

To process a document using intelligent data extraction, users or user profiles must have access to the following objects in Conga CLM:

- IDE Job
- IDE Job Clause Extraction
- IDE Job Field Extraction
- IDE Map Clause Provision
- IDE Map Field Provision

- IDE Map Project Record Type
- IDE Map Provision Record Type
- IDE Provision

You can edit the following email templates that are available in Conga CLM to notify a user about intelligent discovery:

- Intelligent Discovery Processing Error Notification
- Intelligent Discovery Processing Status Update

ⓘ Intelligent Discovery features need add-on licenses. Please contact Conga Sales Team for more information.

Configuring Intelligent Discovery Settings

Intelligent discovery settings must be configured to process documents using Intelligent Data Discovery (IDD). You must first configure remote site settings and then configure intelligent discovery settings.

Prerequisite

Please get in touch with Conga Support for the Remote Site URL, IDE Service URL, Logo URL, Tenant, Token, API URL, and API Token.

To configure intelligent discovery remote site settings

1. Go to **Setup** > **Security** > **Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter the Remote Site Name as IDD.
4. Provide the Remote Site URL for IDD.
5. Leave the Disable Protocol Security checkbox unselected.
6. (*Optional*) Enter a description for the remote site setting.
7. Select the Active checkbox.
8. Click **Save**.

To configure XAJS and Merge Service remote site settings

1. Ensure that you have configured XAJS End Point and Merge Webservice Endpoint comply system properties. For more information, see Comply System Properties.

2. *(Optional)* Navigate to the Remote Site Settings page and ensure that XAJS and Merge Webservice endpoints are available.

To configure intelligent discovery settings for Kira

1. Go to **App Launcher** > **Intelligent Discovery Admin Console** > **Settings**.
2. Click **New**.
3. Enter the following details:
   a. **Name**: KIRA

   > ⓘ The Name field value is case-sensitive.

   b. **IDE Service URL**: Enter the URL provided by Kira.
      Sample: https://ca.app.kirasystems.com/platform-api
   c. **Logo URL**: Enter the URL provided by Kira.
      Sample: https://ca.app.kirasystems.com/images/logos/kira-dark-on-light-54.svg

   > ⚠ The Kira logo is displayed during Intelligent Import.

   d. **Additional Setting**: Add Kira API-related information in JSON or XML format.
      Sample:
      {
      "Version":"v1",
      "DefaultProjectId":120,
      "retrieveHighlightedDocument":false,
      "DeleteDocumentFromKira":true,
      "useAnalytics":false
      }

   > ⚠ **Project ID**
   > The version may vary based on the Kira API. Default Project ID in KIRA is mapped to the default record type in Conga CLM.
   > **retrieveHighlightedDocument**
   > - If retrieveHighlightedDocument is set to true (case sensitive) then both processed and highlighted documents are retrieved to Conga CLM. If retrieveHighlightedDocument is set to false (case sensitive) then only the processed document is retrieved to Conga CLM. By default, the value for retrieveHighlightedDocument is considered as true.

- The retrieveHighlightedDocument property is applicable only for documents less than 10 MB. If the document size is greater than 10 MB, both highlighted and processed documents are not retrieved to Conga CLM.

DeleteDocumentFromKira

If DeleteDocumentFromKira is set to true, the processed document is deleted from Kira. If DeleteDocumentFromKira is set to false, the processed document is not deleted from Kira. By default, the value for DeleteDocumentFromKira is considered as true.

useAnalytics

- useAnalytics is a User Experience Analysis component that collects product usage data. No action is required on your part and there is no impact to any existing product features, system functionality, or configured workflows. No personally identifiable information (PII), nor any other proprietary, confidential, or sensitive data will be collected.
- If useAnalytics is set to true, the product usage data is collected. If useAnalytics is set to false, the product usage data is not collected. If useAnalytics value is not set, the value is considered false.

 e. **Quick Study URL**: Provide URL to launch Kira Quick Study when a user clicks **Custom Provisions** on the Intelligent Import Admin Console page.

 f. **Active**: Select the checkbox.

 g. **Token**: Add the Kira token.

 h. **Show Token**: Select the checkbox to view the token.

 i. **API URL**: Add the IDD URL.

 j. **API Token**: Add the IDD token.

 k. **Show API Token**: Select the checkbox to view the API token.

 l. **Tenant**: Enter the tenant name for IDD.

 m. **Use Normalization**: Select the checkbox to see the extracted values in the standard format.

4. Click **Test Connection** to verify the accuracy of the above details that you have provided. If any details provided for a particular field are incorrect, you will see an error message related to that field. You can rectify the error and click Test Connection. If all the details provided are correct, you will see a message that the test was successful.

5. Click **Sync Provisions** to sync IDE Provision checkbox to synchronize all provisions from the Intelligent server and save them in Conga CLM. If you click Sync Provision before

clicking Test Connection, first the connection is tested and then the provisions are
synced.

6. Click **Save**.

To configure intelligent discovery settings for Conga AI

1. Go to **App Launcher** > **Intelligent Discovery Admin Console** > **Settings**.
2. Click **New**.
3. Enter the following details:
   a. **Name**: CONGAAI

   > ⓘ The Name field value is case-sensitive.

   b. **IDE Service URL**: Enter the URL provided by Conga.
      Sample: https://cw-api-public-docusign-decp.services.cwacloud.net/auth/congaclm/api
   c. **Logo URL**: Enter the URL provided by Conga.
      Sample: https://conga.com/themes/custom/themeskit/images/branding/logo-conga.svg

   > ⚠ The Conga logo is displayed during Intelligent Import.

   d. **Additional Setting**: Add Conga API-related information in JSON or XML format.*}*
      Sample:
      {
      "Version":"v1",
      "retrieveHighlightedDocument":false,
      "DeleteDocumentFromKira":false,
      }

   > ⓘ Conga recommends the values of *retrieveHighlightedDocument* and
   > *DeleteDocumentFromKira* must be false.

   e. **Quick Study URL**: Provide URL to launch Conga AI Quick Study when a user clicks
      Custom Provisions on the Intelligent Import Admin Console page.
   f. **Active**: Select the checkbox.
   g. **Token**: Add the Conga AI token.
   h. **Show Token**: Select the checkbox to view the token.
   i. **API URL**: Add the IDD URL.
   j. **API Token**: Add the IDD token.
   k. **Show API Token**: Select the checkbox to view the API token.
   l. **Tenant**: Enter the tenant name for IDD.

m. **Use Normalization**: Select the checkbox to see the extracted values in the standard format.

4. Click **Test Connection** to verify the accuracy of the above details that you have provided. If any details provided for a particular field are incorrect, you will see an error message related to that field. You can rectify the error and click Test Connection. If all the details provided are correct, you will see a message that the test was successful.

5. Click **Sync Provisions** to sync IDE Provision checkbox to synchronize all provisions from the Intelligent server and save them in Conga CLM. If you click Sync Provision before clicking Test Connection, first the connection is tested and then the provisions are synced.

6. Click **Save**.

To delete intelligent discovery settings

1. Go to **App Launcher** > **Intelligent Discovery Admin Console** > **Settings**.
2. Click **Delete**.
   A confirmation is displayed.
3. Click **OK**.
   The IDD setting is deleted from the IDD database.

Mapping Provisions to Project-Record Type

This section provides you with information about how to map provisions to the project-record type in Lightning.

Prerequisites

- Ensure that you create project-record type mappings only in Lightning.
- Ensure that the clause and field type IDE provisions are created.
- Ensure that record types are available in Contract Management.

Restriction

You must not create project-record type mappings in Classic.

To add a project

1. Go to **Intelligent Discovery Settings** > **Intelligent Discovery Data Mapping** > **Map Project-Record Type**.
   This displays the IDE Map Project Record Types page.
2. Click **New**.
   This displays the Map Provisions page.
3. Enter the Project Name and Record Type Name.
   The Clauses tab is highlighted by default.
4. *(Optional)* Enter the Project ID if you have already created a project in Kira or Conga AI.
   If you leave the Project ID field blank, CLM creates a project in Kira or Conga AI, obtains the Project ID, and populates the Project ID field.
5. Click **Add**.
   This displays the Add Provision Clauses popup that contains a list of clause type provisions and also the provisions which are neither clause nor field type provisions.
6. Use the search box to search for a particular clause or select multiple clauses and click **Add**.

   > ⓘ If the value of the Template Reference field is blank, you need to enter the appropriate value before saving the clause provision or you will encounter an error.

7. Scroll to the end of the page and click **Save**.
8. Select the Fields tab.
9. Click **Add**.
   This displays the Add Provision Fields popup that contains a list of field type provisions and also the provisions which are neither clause nor field type provisions.
10. Use the search box to search for a particular field or select multiple fields and click **Add**.

    > ⓘ If the values of the Meta Data Field and Base Object field are blank, you need to enter the appropriate value before saving the field provision or you will encounter an error.

11. Scroll to the end of the page and click **Save**.
12. Select the **Sync IDE Provision** checkbox to update the provision details (base object, template reference, and metadata) in the default provisions list.
    All the clause and field provisions are selected by default. You can unselect the clause and field provisions that you do not want to sync to the default provisions list.

If you do not select the Sync IDE Provision checkbox before saving the mapping, the changes to the provisions are not updated in the default provision mapping.

> ⓘ When you select the Sync IDE Provision checkbox, clauses and fields are mapped to provisions.

13. Click **Save** on the top-right corner of the page.

To edit a project or provision details

1. Go to the IDE Map Project Record Types page.
2. Next to the project name, click ▼ and select **Edit**.
   This displays the Map Provisions page.
3. Hover on any field and click the edit icon (✎) beside any editable field.
   This makes the field editable.
4. Update the field and press Enter or click anywhere on the page.
   This updates the field.
5. Perform one of the following tasks according to your requirement:
   a. Click **Save** on the top-right corner of the page.
      This saves the mapping but does not sync the provisions to the default provisions list.
   b. Select the **Sync IDE Provision** checkbox and click **Save** on the top-right corner of the page.
      This syncs all the provision details in the default provisions list and saves the mapping.

      > ⓘ When you select the Sync IDE Provision checkbox, clauses and fields are mapped to provisions.

To clone the provisions to project-record type mapping

1. Go to the Map Provisions page.
2. Click **Clone**.
   This displays a confirmation message.
3. Click **Ok**.
   This clones the provisions to the project-record type mapping. The Record Type is not cloned.

CLM

To delete provisions

1. Go to the Map Provisions page.
2. Select the checkboxes beside the field provisions or clause provisions you need to delete.
3. Click **Delete**.
   This displays a confirmation message.
4. Click **Delete**.
5. Scroll to the end of the page and click **Save**.

To delete the provisions from project-record type mapping

1. Go to the IDE Map Project Record Types page.
2. Next to the project name, click ▼ and select **Delete**.
   This displays the Delete IDE Map Project Record Type popup.
3. *(Optional)* Select the Delete mapping from the AI Engine checkbox to delete mappings from Kira or Conga AI/Conga AI.
   If you leave the Delete mapping from the AI Engine checkbox unselected and click **Delete**, the mappings are deleted only from IDD.
4. Click **Delete**.

Provisions Supported by Conga AI

Conga AI supports 41 provisions. The following table lists the supported provisions.

Fundamental Terms	Standard Terms - Fields	Standard Terms - Clauses
• Agreement Title • Parties • Effective Date • Commencement Date • Original Expiration Date • Termination Notice • Renewal Type • Renewal Period • Renewal Notice • Renewal Limit • Signatures • Notice • Notice Address • Related Master Agreement Name • Total Contract Value	• Audit Rights • pricing/Billing Frequency • Data Security Breach Notification • Dispute Resolution • Exclusivity/Not granted • Exclusivity/Required • Governing Law • Indemnification Provision • Non-Solicitation Period • Pricing/Payment Model • Pricing/Payment Terms	• Confidentiality • Assignment • Contract Rate • Compensation • Indemnification • Insurance • Intellectual Property • Licenses • Productivity • Publicity • Reps and Warranties • Force Majeure • Integration • Notice Section Clause • Dispute Resolution Clause

Setting Up Salesforce and Kira Single Sign-on

You can set up single sign-on to authorize users to access Salesforce and Kira with one login.

Prerequisite

You must have a Kira Enterprise Edition license.

To set up single sign-on

1. Set up Salesforce as an Identity Provider. For more information, see Salesforce documentation.
2. Set up Kira as a Service Provider. For more information, contact Kira Support.

Configuring Intelligent Discovery Status Panel in Lightning

You must configure the intelligent discovery status panel in lightning to view intelligent discovery processing status.

Prerequisite

You must configure Intelligent Discovery settings. For more information, see Configuring Intelligent Discovery Settings.

To configure the Intelligent Discovery Status panel

1. Navigate to the Agreement Detail page.
2. Click the **Setup** icon and select the **Edit Page** option.
3. In the left panel, search for Intelligent Discovery Status.
4. Drag Intelligent Discovery Status from the left panel and drop on top of the Agreement Actions panel.
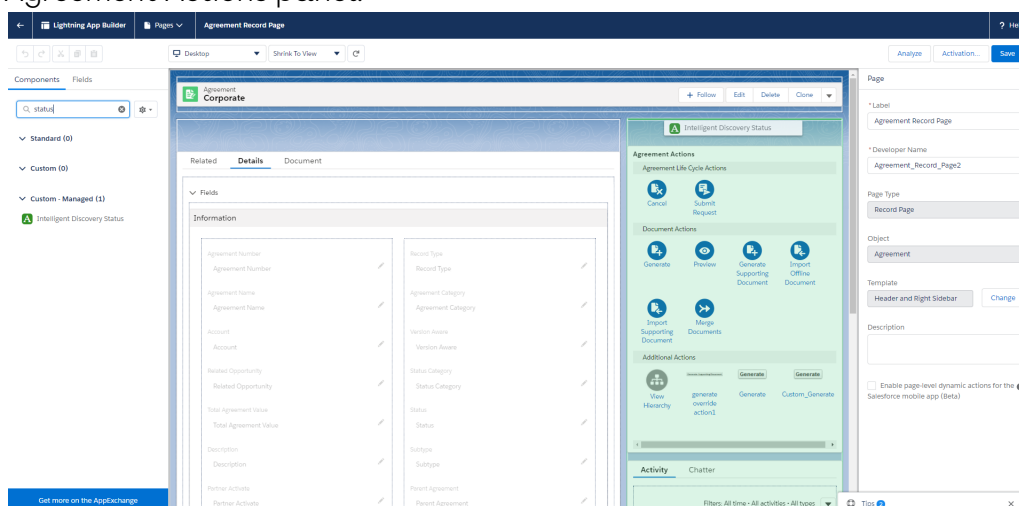
5. *(Optional)* If you add the Intelligent Discovery Status panel other than top, select the Intelligent Discovery Status panel and unselect the Intelligent Discovery Status Panel on Top checkbox in the Pages section on the right-side.
6. Click **Save**.

Migrating Mappings from Salesforce to Intelligent Data Discovery

> ⓘ This topic is applicable only for Kira users. You cannot migrate mappings from Kira to Conga AI.

You can migrate existing mappings and settings from Salesforce to Intelligent Data Discovery (IDD). After you have migrated the existing mappings, you can perform any of the following tasks according to your requirement:

- You can leave Project ID in the mapping as it is.
- If you need to use a different project that you have created in Kira, you must edit the mapping and manually enter the project ID from Kira in the Project ID field in CLM. The Project ID field cannot be left blank after you edit a mapping.
- If you create a new mapping in CLM, CLM creates a project in Kira, obtains the Project ID from Kira, and populates the Project ID field in CLM automatically. For information regarding editing mappings, see Mapping Provisions to Project-Record Type.

To migrate mappings

1. Go to **App Launcher** > **Intelligent Import Admin Console** > **Settings**.
2. Click the **Edit** hyperlink of an existing configuration.
3. Update the following details:
    a. **API URL**: Add the IDD URL.
    b. **API Token**: Add the IDD token.
    c. **Tenant**: Enter the tenant name for IDD.
4. Click **Test Connection**.
5. Click **Sync Provisions**.
6. Click **Save**.
7. Go to **Intelligent Discovery Settings** > **Intelligent Discovery Data Mapping** > **Map Project-Record Type**.
8. Select a mapping.
9. Click the **Edit** button.
10. Click **Save**.

Configuring Intelligent Discovery Fields

You can configure fields displayed on the Agreement Detail tab when you review a third-party agreement document imported through Intelligent discovery.

To configure fields on the Agreement Detail tab

1. Go to **Setup** > **Object Manager** > **Agreement** > **Field Sets** > **Update Fields Intelligent Import Field Set**.

2. Drag the fields from the object palette and drop them into the In the Field Set container.
3. To make a field as required, double click the field or click the wrench icon (🔧) next to the field.
4. Select the Required checkbox and click **OK**.
5. Click **Save**.

Setting Up Conga Contract Intelligence

You must configure the Conga Contract Intelligence widgets on the Home page and the Agreement Detail page in CLM to use Contract Intelligence for importing documents. After you set up the contract intelligence components in CLM, you must set up the Contract Intelligence application. For more information, see Setting Up Contract Intelligence for CLM.

Prerequisites

- You have a Conga Contract Intelligence license.
- You have used the APTS_CCIImportAgreementStatusCategory admin entry to configure the visibility of the Intelligent Document Import button on the agreement detail page. For more information, see Admin Entries.
- You have enabled the Enable Document Versioning and Enable Version Control comply system properties or the agreement is version-aware. For more information, see Comply System Properties.
- You have configured the integration setting. For more information, see Configuring Integration Settings.
- You have activated remote site settings (IntegrationSettingProd and IntegrationSettingSandbox), and CSP trusted sites (IntegrationSettingsProdURL and IntegrationSettingsSandboxURL). For more information, see Connecting to External APIs.
- You have configured the Salesforce CORS configuration allowlist with the API URL as the origin URL pattern for the CCI host. For more information, see Configure Salesforce CORS Allowlist.

Limitation

You can only use DOC, DOCX, and PDF file types to import documents.

To configure CCI widgets on the Home page

1. Navigate to the Home page.
2. Click the **Setup** icon and select the **Edit Page** option.

3. In the Components search box, enter `CCIAdminContainer`.
4. Drag and drop the CCIAdminContainer component at any position on the Home page.

> ⓘ You must set component visibility for the CCIAdminContainer component only for administrators.

5. In the Components search box, enter CCIUserContainer.
6. Drag and drop the CCIUserContainer component at any position on the Home page.
7. Click **Save**.

   The following screenshot displays the CCI widgets (Conga Contract Intelligence - Admin Actions and Conga Contract Intelligence - Intelligent Document Import) on the Home page.
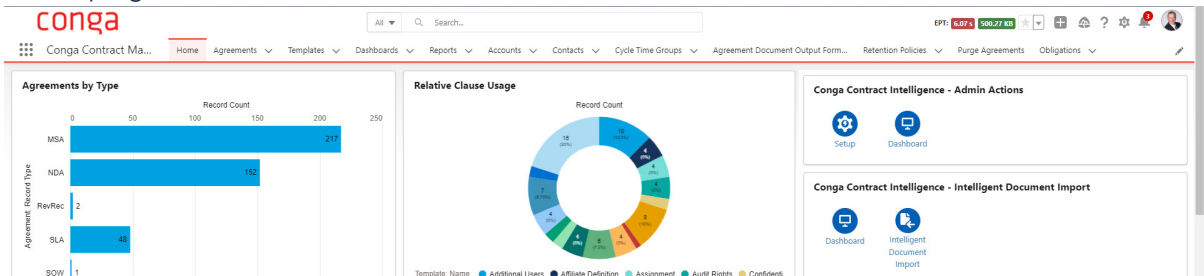
To configure Contract Intelligence widgets on the Agreement Detail page

1. Navigate to the Agreement Detail page.
2. Click the **Setup** icon and select the **Edit Page** option.
3. In the Components search box, enter `CCIUserContainer`.
4. Drag and drop the CCIUserContainer component at any position on the Agreement Detail page.
5. Click **Save**.

   The following screenshot shows the CCI widget (Conga Contract Intelligence - Document Actions) on the Agreement Detail page.

Configuring Obligation Management

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

The Obligation Management stage ensures that deliverables must be met. This includes:

- Maximize contract value with fulfillment tracking
- Alerts linked to expirations, renewals, and key events, post-execution workflows
- Searching and reporting

Organizations typically set up common business rules that allow groups and users to receive email alerts 30, 60 and 90 days before agreements expire. Other rules can be configured based upon your needs. Check with your system administrator for more details. You can also set up tasks and events for specific agreements on a case-by-case basis. An example of another common business rule is a pricing change, where modifications to pricing and financial terms trigger a notification to interested parties.

New Task

The New Task feature is available within an Agreement Record and allows you to create a new task related to a specific agreement. Click New Task to enter key pieces of information that need to be tracked in connection with a date, event or milestone. The key fields are as follows:

- Assigned to – Allows you to identify the recipient. Use the lookup icon to identify this individual.
- Subject – A pre-defined list is available through a lookup icon and can be configured for your organization.
- Status – The status field is a drop-down or picklist and provides visibility into whether the task has not been started, is in progress, has been completed, etc.

- Comments – Add any comments about the date, event or milestone that requires action.
- Send Notification Email – The send notification email is critical to ensure timely notification of relevant individuals and make sure the task is properly managed.

Once you have completed the New Task window, click Save to complete the process. Other options include Save & New Task or Save & New Event if you want to create another Task or Event.

New Event

The New Event process is the same as the New Task process except that instead of assigning a task to an individual, the event is logged and managed as an Event on the individual's Conga and regular corporate email calendar. A status category is not included to manage whether the task has been completed or not, since for an event, status is not relevant.

Searching and Reporting

Conga CLM provides the default set of capabilities for searching, views, dashboards, and reporting. 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 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** 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 checkbox 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.
	• Advanced Search allows more granularity, enabling you to search for Exact Phrases and against specific elements. For example, Agreements, Suppliers or Contacts.
	• Use Advanced Search option in the sidebar to search a subset of objects in combination and more fields than sidebar search, including custom fields and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search.
		• 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. The global search keeps track of which objects you use and how often you use them and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list. If the global search does not have enough information about which objects you use, you see results for all objects until it has more information.

Sidebar Search	Advanced Search	Global Search
• **Wildcards and Operators** 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.		• **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 posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases.

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.

About Reports and Dashboards

Salesforce enables you to create reports and dashboards.

Reports

You can access the reports through the Reports Tab. Conga CLM 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 Conga CLM are:

Reports	Description
Agreement Expiration - This Quarter	Lists all agreements expiring in current fiscal quarter
Agreement Expiration - This Year	Lists all agreements expiring in current fiscal year
Agreement Search	Helps you easily find your agreements
Agreement Value by Type	Lists all agreements by the type along with contract value
Agreement Value Report	Lists all agreements by their contract value along with the account

Reports	Description
Agreements by Account	Lists all agreements by the account name
Agreements by Stage	The present stage of agreements
Agreements of High Value due Renewal	Time when the high-value agreements are due for renewal
Agreement with Non-Standard Terms	Lists all non-standard Agreements
Contract Activity Report	Shows recent contract activity report
Contracts Expiring This Year by Value	Expiring contracts with values
Contracts with Non Standard Language	Lists all agreements containing non-standard language
High Risk Contracts	List highly risky agreements

You can create new reports by either starting from scratch or taking a report containing the desired results, modifying it, and changing the reports name using the Save As feature.

Salesforce delivers standard report folders containing reports for each record type. For example: Accounts, Opportunities, Leads, and more. These reports are used as a starting point for your organizations reporting efforts. Salesforce allows all users to run, customize, and create reports. For more information on setting up and managing reports within Conga CLM, see salesforce.com information related to creating and customizing reports.

Conga CLM 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.

Conga CLM provides dashboard views for the following three most common profiles:

- Contract Performance Dashboard
- Executive Dashboard
- Legal Performance Dashboard

Conga CLM provides a robust Dashboard capability at your fingertips, adding an edge to your business solutions. Navigate to the Dashboards tab to customize the page by designating which dashboard type you would like to see from a list. For more information, see Working with Dashboards.

Structure

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators. A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. As an Administrator, you can control access to reports and dashboards by storing them in folders, which can be public, hidden, or shared.

Here's a typical representation of the relation between Report Type, Report and Dashboard. Source: Visualforce.

Unleashing Reports and Dashboards

The Unleashing Reports and Dashboards section provides you the basic concepts and an understanding to enable you to use data to create dashboards and reports.

Use the available facts to present the information important to you—from the big picture to the data point. Let us consider a few use cases that suggest what reports and dashboards can do for you and how you can take advantage of built-in tools to share the information with others. This section also introduces you to some cool features, like combination charts and custom table components, conditional highlighting, cross filters, buckets, and custom summary formulas.

You can also try hands on more advanced topics, such as merging multiple reports into joined reports and embedding report charts in record detail pages.

Cycle Time Reporting

The system does not provide the UI to select just fields for tracking time. You have to select a field and set up a dummy cycle time group. Once a group is set up 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 the tab does not exist, select the Admin tab and click the Cycle Time Group link. Ensure that the APTS_CycleTimeReportingEnabled admin setting value is set to true.

Cycle Time Groups must be with the following details:

Field Label	Name	Description	From Value	To Value	Active
Status Category	Request to In Effect	This will measure time from request being created in the system, to the time it went to 'In Effect' status	Request	In Effect	✓
Status Category	Request to In Signatures	This will measure the time it took from a record being created in the system to status 'In Signatures'	Request	In Signatures	✓
Status Category	Request to In Authoring	This will measure the 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 the time it took from status 'In Authoring' to 'In Signatures'	In Authoring	In Signatures	✓

Field Label	Name	Description	From Value	To Value	Active
Status Category	Authoring to In Effect	This will measure the time it took from 'In Authoring' (generating contract) to 'In Effect'	In Authoring	In Effect	√
Status Category	Signatures to In Effect	This will measure time from 'In Signatures' to 'In Effect'	In Signatures	In Effect	√

> ⓘ **Note**
>
> Make sure all the groups are in the Active state.

To maintain Cycle Time Groups

1. Click **Cycle Time Group** > **New**.
2. Select the agreement field and click **Next**.
3. Enter **Name**, **From**, **To** and **Description** and click **Save**. Optionally, click **Save & New** to save the current groups and create a new group.

To view, edit, activate, or delete Cycle Time Group

Prerequisites

- 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.

To view, edit, or deactivate Cycle Time Group

1. 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.
2. Groups must be in the Active state.
3. On the Cycle Time Group tab, access the saved Cycle Time Group.
4. As required, use Edit, or Deactivate options.

Managing Cycle Time Report Definitions

You can define the Cycle Time Report using the two options- **Using Summary Data** or **Using Detail Data**.

Using Summary Data

Select Agreements with Cycle Time Group Data object to define reports. Also, select Cycle Time Group and Duration fields.

Using Detail Data

Select Agreement with Cycle Time Field Data object to define reports. Also, select Cycle Time Field and Duration fields.

Excluding work-in-progress Records

Keep the following filter criteria for all of the reports:

Field		Operator		Value		
Duration (Hours)	⌄	greater than	⌄	0		AND
Cycle Time Field	⌄	equals	⌄	Apttus__Status__c		AND

Searching and Reporting Agreement Explorer Reports

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 Conga CLM customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable fieldsets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad-hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are three types available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.
Agreement Hierarchy by Account(s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

For more detailed information on how to run, use and maintain Agreement Explorer reports, see About Agreement Explorer Reports.

Configuring Admin Settings for Agreement Explorer

The APTS_AdminProfiles admin entry should be configured to use Agreement Explorer.

To configure APTS_AdminProfiles:

1. Navigate to **Admin Home** page.
2. Click **New**. This displays Admin Edit page.
3. Enter the following details:
    a. **Name**: APTS_AdminProfiles

b. **Value**: Enter profile names as comma separated values.

4. Click **Save**.

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.

Editing Classic Email Templates

You can update the available activation and review cycle classic email templates according to your requirement.

To edit a classic email template

1. Go to **Setup** > **Email** > **Classic Email Templates**.
2. According to your requirement, click **Edit** for an email notification template.
3. Update the details and click **Save**.

ⓘ Ensure that you do not delete the notification email templates.

Configuring Old Activation UI

You can opt to use the old activation UI instead of the new activation UI.

To configure old activation UI

1. Go to **Setup** > **Object Manager** > **Agreement** > **Fields & Relationships**.
2. Click **New** and select **Formula**.
3. Click **Next**.
4. Enter **Activate_Old** in the Field Label field and select **Text**.
5. Click **Next**.
6. Enter a formula.

Sample

```
IF (OR(ISPICKVAL(Apttus__Status_Category__c,"In Signatures"),
ISPICKVAL(Apttus__Status_Category__c,"In Filing"),
AND(ISPICKVAL(Apttus__Status_Category__c,"In
Authoring"),ISPICKVAL(Apttus__Source__c,"Other Party Paper"))),
IF(OR($User.UIThemeDisplayed == 'Theme4d', $User.UIThemeDisplayed == 'Theme4t')
, HYPERLINK("/apex/Apttus__LightningAgreementActivate?id=" &Id, IMAGE("/
resource/Apttus__Button_Activate", "Activate"),"_self") , HYPERLINK("/apex/
Apttus__AgreementActivate?id=" &Id, IMAGE("/resource/Apttus__Button_Activate",
"Activate"),"_self")),NULL)
```

7. Configure the *APTS_CustomLinksforActionPanel* admin entry to view the new activate button in the Additional actions section of an agreement. For more information, see Admin Entries.

Connecting to External APIs

You must configure integration settings, remote site settings, and CSP trusted sites to use the activation UI and Conga Contract Intelligence (CCI) for CLM.

For more information, see the following topics.

- Configuring CSP Trusted Sites
- Configuring Integration Settings
- Configuring Remote Site Setting

Configuring CSP Trusted Sites

You must configure CSP trusted sites for CORS communication and to access external APIs.

To configure **CSP Trusted Sites**

1. Go to **Setup** > **Security** > **CSP Trusted Sites**.
2. Click **New Trusted Site**.
3. Enter the following details in the General Information section:
   a. **Trusted Site Name**: Enter a site name.
   b. **Trusted Site URL**: Enter the trusted site URL.

   > ⚠ Please contact the Conga Support team for Trusted Site URL details.

   c. **Description**: Enter a description.
   d. **Active**: Select the checkbox.
   e. **Context**: Select All.
4. Select all the checkboxes in the CSP Directives section.
5. Click **Save**.

Configuring Integration Settings

You must configure integration settings to connect to external APIs and to enable content search in large files.

Prerequisite

If you are configuring the integration setting for Conga Contract Intelligence (CCI), you must first set up CCI widgets on the Home page. For more information, see Setting Up Conga Contract Intelligence for CLM.

To configure integration settings for Activation UI

1. Navigate to the Integration Settings tab.
2. Enter the following details:
   a. **Name**: Enter a name.
   b. **End point URL**: Enter an endpoint URL.
   c. **API Token**: Enter an API token.
   d. **Tenant**: Enter the tenant name.

> ⓘ Please get in touch with Conga Support for End Point URL, API Token, and Tenant details.

    e. **Search Content in Large Files?**: Select the checkbox to allow searching content in large files.

> ⓘ Ensure that you select the checkbox only if you need to search content in large files. Users might observe an increase in page loading time after selecting the checkbox.

    f. **Personalize**: Select the checkbox to search content only in the agreements that you have created or own.

3. Click **Save**.

To configure integration settings for Conga Contract Intelligence (CCI)

1. Click the **Setup** button on the Home page in the Conga Contract Intelligence - Admin Actions widget.
2. In the CCI Admin Configuration popup, enter the API URL, API token, and tenant information.

> ⓘ Please get in touch with Conga Support for API URL, API Token, and Tenant details.

3. Toggle the configuration to Active
4. Click **Save**.

Configuring Remote Site Setting

You must configure the remote site setting to connect to external APIs.

To configure remote site settings

1. Go to **Setup** > **Security** > **Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter the following details:
    a. **Remote Site Name**: Enter a remote site name.

    b. **Remote Site URL**: Enter the remote site URL.

> ⚠ Please get in touch with Conga Support for Remote Site URL details.

    c. **Disable Protocol Security**: Leave the checkbox unselected.

    d. **Description**: Enter a description.

    e. **Active**: Select the checkbox.

4. Click **Save**.

Managing Send for Review

Select one of the following topics for more information:

- Prerequisites for Parallel Review
- Configuring the Send for Review Custom Button
- Configuring MS Teams Setting
- Configuring Email Service for Ending Parallel Review by Email
- Adding the Review Status Panel on the Agreement Detail Page
- Managing Office 365 Review
- Disabling Clickjack Protection

Prerequisites for Parallel Review

The following table lists the configurations that you must perform to allow users to use parallel review. For more information on the parallel review, see Sending an Agreement Document for Parallel Review.

Configuration	Description
Comply system properties	See Comply System Properties.
Parallel Review	Required to send documents for parallel review.
Enable Document Versioning	Required to send documents for parallel review.
Parallel Review for related agreements	Required to send related agreements for parallel review.

Configuration	Description
Filter By The Primary Agreement Status	Required to filter Related, Sibling, Parent, or Child agreement documents based on the primary agreement status.
Enable document permissions for review	Required to view the Set field and clause permission toggle in the second step.
Comply user properties	See Comply User Properties.
Show Add More Button During Review	Required to customize the visibility of **Add more** button for specific profiles or users.
Admin entries	See Admin Entries.
APTS_RetainFileNameForParallelReviewMergedDocument	Required to retain the name of the imported document in the merged document. When a parallel review ends for an imported document, the reviewed document is merged with the latest reviewed document.
APTS_EmailTemplateForReviewSignatures or APTS_EmailTemplateForReview	Required to configure default email template to send documents for review. If the admin entries (APTS_EmailTemplateForReviewSignatures or APTS_EmailTemplateForReview) are not configured, the default email template is set to the template provided by Conga. If no Email Template is selected and no default email template has been configured (using APTS_EmailTemplateForReview), the Email Template "Email Template For Review Signature" is used. In most cases, this template is not configured as "Available for Use" and must be manually set to true or an error will occur. In the case of a new installation of the package (non-upgrade), this Email Template is automatically configured as "Available for Use."
APTS_DefaultEmailTemplateFolder	Not applicable for send for review flow from the Dec '21 release.
APTS_SkipEmailTemplateSelection	Required if you need to disable the selection of email templates.

Configuration	Description
APTS_EnableValidationForEmailWithoutUserContact	Required if you need users to enter valid email IDs or contacts in the To or Additional To fields. Applicable in Salesforce Classic mode.
APTS_DefaultEmailContactName	Required to update activity history. Applicable in Salesforce Classic mode.
APTS_EnableCustomEmailAddressLookup	Required to view the custom pop-up page; otherwise, the standard Salesforce pop-up page is displayed.
APTS_SuppressAutoReviewEmails	Required to unsubscribe review emails (review completion, review error, and review cycle completion).
Email templates	See Editing Classic Email Templates.
The following email templates can be customized for the review cycle notifications. • Parallel Review Cycle Complete Notification • Parallel Review Cycle Complete Without Document Notification • Parallel Review Incorrect File Upload Notification • Parallel Review Submission Failure Notification	If you delete an email template from CLM, the document reviewers do not receive the email notification related to the deleted email template.
ParallelReviewCycleCancelNotification	Required to notify reviewers when a review cycle is canceled. For more information, see .Prerequisites for Parallel Review vDecember-21.
Email Service for Ending Review by Email	See Configuring Email Service for Ending Parallel Review by Email.

Configuration	Description
Agreement protection	Required to apply protection to the documents being sent for review. When you select any of the document protection options except Ignore, the document protection selected while sending for review is given priority irrespective of the document protection applied while generating the document. For configuring document protection, see Configuring Agreement Document Protection. You can see the Set Document Permissions page if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see Configuring Agreement Document Protection.
Custom button - Send For Review Custom	Required to use the old Send for Review UI. For more information, see Configuring Send for Review Custom Button.
Review Status Panel	Required to view the review status panel on the agreement detail page. For more information, see Adding Review Status Panel on the Agreement Detail Page
Configure Agreement Documents and Related Documents columns	You must configure registration settings to allow users to configure Agreement Documents and Related Documents columns on the first step of review. For more information, see Generating Registration Setting.

Configuring the Send for Review Custom Button

You can opt to use the old send for review UI by configuring the **Send For Review Custom** button. You can restrict users from sending non-essential agreements or documents for review by passing Agreement IDs or Document IDs as parameters in the formula field. You can add document IDs of the related, parent, sibling, or child agreements. If any document IDs of documents mentioned in the formula field are in review, those documents are not listed when a user sends agreement documents for review. For more information on sending documents for review, see Sending an Agreement Document for Parallel Review and Sending an Agreement Document for Review.

To configure the send for review custom button

1. Go to **Setup** > **Object Manager** > **Agreement** > **Fields & Relationships**.
2. Click **New** and select **Formula**.
3. Click **Next**.
4. Enter **Send For Review Custom** in the Field Label field and select **Text**.
5. Click **Next**.
6. Enter a formula.

> **Sample**
>
> ```
> IF (OR(ISPICKVAL(Apttus__Status_Category__c,"In Signatures"),
> ISPICKVAL(Apttus__Status_Category__c,"In
> Authoring")),IF(OR($User.UIThemeDisplayed == 'Theme4d', $User.UIThemeDisplayed
> == 'Theme4t', $User.UIThemeDisplayed == 'Theme4u'), HYPERLINK("/apex/
> Apttus__SendForReview?id="&Id &
> "&action=Send_To_Other_Party_For_Review&documentIdsCsv=0693h000009t9pdAAA,0693h
> 00000AKhjOAAT,0693h00000AKhjTAAT,0693h00000AKhk2AAD", IMAGE("/resource/
> Apttus__LightningResource/images/actions/sendforreview.svg", "Send For Review")
> , "_self"), HYPERLINK("/apex/Apttus__SendEmail?id="&Id &
> "&action=Send_To_Other_Party_For_Review", IMAGE("/resource/
> Apttus__LightningResource/images/actions/sendforreview.svg", "Send For Review")
> , "_self")), NULL)
> ```

7. Configure the **APTS_CustomLinksforActionPanel** admin entry to view the new **Send for Review Custom** button in the Additional actions section of an agreement. For more information, see Admin Entries.

Configuring MS Teams Setting

This section provides you information about how to configure MS Teams settings and also how to configure remote site settings. You need to gather client Id and client secret from the Azure portal to configure MS team setting in Contract Management.

Prerequisite

- You must have MS teams and OneDrive or SharePoint license to integrate MS teams with Contract Management.

- You can schedule the MSTeamsJobScheduler job to create an MS Teams channel according to your expected frequency.

To collect the Azure Client ID and Client Secret from the Azure portal

1. Log in to the Azure portal as an Administrator.
2. Select **Azure Active Directory**.
3. Select **App registrations**.
4. Select **New registration** and enter *Apttus CLM Application*.
5. Click **Register**.
6. From the left navigation, select **Overview**.
7. Copy Application (Client) ID.
8. From the left navigation, select **Certificates & secrets**.
9. Click **New client secret**.
10. Add a description, select the validity duration, and select Add.
11. Copy the value.
12. On the left panel select **API Permission**.
13. Click the **Add Permission** button.
14. Provide the following permissions for Microsoft Graph API.

Type	Permission
Delegated	Files.ReadWrite
Delegated	Files.ReadWrite.All
Delegated	Group.Read.All
Application	Group.Read.All
Delegated	Group.ReadWrite.All
Application	Group.ReadWrite.All
Delegated	Sites.ReadWrite.All
Application	Sites.ReadWrite.All
Delegated	User.Read

Type	Permission
Delegated	User.Read.All
Application	User.Read.All
Delegated	Directory.AccessAsUser.All
Application	Directory.ReadWrite.All

15. On the Reporting API Application - API Permissions page, click **Grant admin consent**.

To configure MS teams setting in Contract Management

1. Navigate to **MS Teams Setting** tab.
2. Click **New**.
3. Enter the following details to connect to the MS teams:
   a. **Name**: MS Teams
   b. **MS Teams Login URL**: Enter MS Teams login URL to connect to the service.
      Sample value: https://login.microsoftonline.com/clmdev-eng.apttuscloud.io/oauth2/v2.0/
   c. **MS Graph URL**: Enter MS Teams graph URL to connect to the service.
      Sample value: https://graph.microsoft.com/v1.0/
   d. **Scope**: Enter scope to be used in MS teams graph API.
      Sample value: https://graph.microsoft.com/.default
   e. **Client Id**: Enter the client Id. (*Refer step 7 in the previous configuration*)
      Sample value: 8m7r4**d-****-4c**-b4d8-e4a6b***79b
   f. **Client Secret**: Enter the client secret. (*Refer step 11 in the previous configuration*)
      Sample value: taiLWUY*****38&7B%400$5234c***UY%
   g. **Show Client Secret**: Select the checkbox to expose the Client Secret field value.
   h. **Team Name Format**: Enter a team name format to be used while creating a team in MS teams.
      Sample value: %Name% (Name of the Agreement)
   i. **Channel Name Format**: Enter a channel name format to be used while creating a channel in MS teams.
      Sample value: %Title% (Name of the document version detail)
   j. **Active**: Select the checkbox to activate the MS teams setting.
4. Click **Save**.

> (i) **Note**
>
> You can activate only one MS team setting at a time.

To configure remote settings in Contract Management

1. Go to **Setup** > **Security Controls** > **Remote Site Settings.**
2. Click **New Remote Site**.
3. Enter a Remote Site Name and the **Remote Site URL** as https://login.microsoftonline.com for MS Teams Login.
4. Select the **Active** checkbox.
5. Click **Save & New**.
6. Enter a **Remote Site Name** and the **Remote Site URL** as https://graph.microsoft.com for MS Graph URL.
7. Select the **Active** checkbox.
8. Click **Save & New**.
9. Enter a Remote Site Name and the **Remote Site URL** for SharePoint URL.
   The SharePoint URL is specific to your domain and Microsoft license.
10. Select the **Active** checkbox.
11. Click **Save**.

To schedule the MS Teams job via Schedule Apex

1. Click **Setup** > **Develop** > **Apex Classes** > **Schedule Apex**.
2. Enter the following information to configure the job parameters.
   a. **Job Name**: Enter a job name.
   b. **Apex Class**: Click the 🔍 icon. Set search to MSTeamsJobScheduler and select MSTeamsJobScheduler.
   c. **Frequency**: Select either Weekly or Monthly based on your requirement.
      - If you select Weekly, you need to specify one or more days of the week the job needs to run (such as Monday and Wednesday).
      - If you select Monthly, you need to specify either the date the job is to run or the day (such as the second Saturday of every month.)
   d. **Start**: Select the start date.
   e. **End**: Select the end date.
   f. **Preferred Time**: Select a preferred time for the dropdown.
3. Click **Save**.

To schedule the MS Teams job via Developer Console

1. Navigate to **Developer Console**. This displays the Developer Console window.
2. Select **Debug** tab and select **Open Execute Anonymous Window**. This displays the Enter Apex Code window.
3. Add the code in the following format:

```
Apttus.MSTeamsJobScheduler c1 = new Apttus.MSTeamsJobScheduler();
String sch1 = '0 5 * * * ?';
System.schedule('MSTeamsJobScheduler - Schedule Job 5 mins', sch1, c1);
```

Configuring Email Service for Ending Parallel Review by Email

This configuration allows a user to end a parallel review by email.

To configure email service

1. Go to **Setup** > **Build** > **Develop** > **Email Services**.
2. Click **New Email Service**.
3. Enter the following details:
   a. **Email Service Name**: Enter *AgreementEndParallelByEmail*.
   b. **Apex Class**: Enter *AgreementEndParallelReviewByEmail*.
   c. **Accept Attachments**: Select *Binary Attachments Only*.
   d. **Advanced Email Security Settings**: Leave the checkbox unselected.
   e. **Accept Email From**: Leave it blank.
   f. **Active**: Select the checkbox.
4. In the Failure Response Settings section, leave the options as is.
5. In the Email Addresses section, click the **New Email Address** button.
   This displays the Email Service Address page.
6. Enter the following details:
   a. **Email Address Name**: *ApttusEndReviewByEmail*
   b. **Email address**: Leave the value as is.
   c. **Active**: Select the checkbox.
   d. **Context User**: Logged in user name is provided by default. Leave the user name as is.
   e. **Accept Email From**: Delete the default email address and leave it blank.

7. Click **Save**.

   This displays the Email Service: ApttusEndReviewByEmail page.
8. From the Email Addresses section, copy the email address.
9. Navigate to the **Admin Home** page.
10. Click **New**. This displays the Admin Edit page.
11. Enter the following details:
    a. **Name**: Enter *APTS_EndReviewEmailServiceAddress*.
    b. **Value**: Paste the email address from the email service.
12. Click **Save**.

Adding the Review Status Panel on the Agreement Detail Page

You must configure the Review Status panel on the Agreement Detail page to view the parallel review status.

To configure review status panel

1. Navigate to the Agreement Detail page.
2. Click the **Setup** icon and select the **Edit Page** option.
3. In the left panel, search for reviewStatus.
4. Drag reviewStatus from the left panel and drop it on above the Agreement Actions panel.
5. Click **Save**.

Managing Office 365 Review

Select one of the following topics.

- Preparing for Office 365 Review
- Setting Up Office 365 Review

Preparing for Office 365 Review

This topic provides guidelines for selecting a flow for Office 365 configuration. You must consult your organization's SharePoint or Azure configuration team before finalizing the Office 365 configuration approach. You can choose to configure Sharepoint or Azure App according to your requirement.

About Office 365 Configuration

Sharepoint

During Office 365 review, SharePoint temporarily stores agreement documents when a review cycle is initiated. Agreement documents are removed once the review cycle is ended in CLM. Hence, you must provide the required permissions for users to access the stored files.

Site Configuration

You can create a dedicated site in your organization's SharePoint and use the configuration details while configuring Office 365 feature in CLM. If you do not create and configure a dedicated site in your organization's SharePoint, Office 365 uses your organization's default site.

Folder Configuration

You can create a folder in the configured SharePoint site and use the folder details while configuring Office 365 feature in CLM. If you do not create a folder, SharePoint creates a default folder in the configured SharePoint site and adds all CLM agreement documents to the default folder.

Azure App

You must use Azure to communicate between CLM and SharePoint. You can create an app in your Azure portal.

App Permissions

You must provide the required permissions to the Azure app for all the reviewers to allow the Azure app to create folders and files. You can use one of the following flows to facilitate interaction between the Azure app and SharePoint.

- Application Flow
- Delegated Flow

Application Flow

The Azure app can directly interact with SharePoint without any user interference. There is no need for user permission or user interference. For more information, see Application permissions and Application access.

Delegated Flow

The Azure app cannot interact with SharePoint without user interference. Both the review initiator and the Azure app must have permission to create a folder or file and add permission in SharePoint. When sending a document for review, the review initiator must log in every time. Hence, this is a restrictive flow. For more information, see Delegated permissions and Delegated access.

App Configuration

The app creation and configuration are different for the application and delegated flows. You must select a flow that is appropriate to your organization's policy.

Setting Up Office 365 Review

This section tells you how to set up Office 365 review by configuring remote site settings, the Azure app, and Office 365 settings.

Prerequisites

- Microsoft Office 365 E3 or E5 subscription.
- Azure Client ID, Client Secret, and Active Directory. Contact your IT administrator for these.
- Allow users to use Office 365. For more information, see Prerequisites for Parallel Review.
- To share agreement documents with external stakeholders, configure a SharePoint site with external sharing settings enabled. For more information, see Microsoft Documentation.
- Configure the following email templates according to your requirement for Office 365 review:
    - Agreement Office365 External Review Notification
    - Agreement Office365 Internal Review Notification
    - End Review Office 365
    - Office365 Review Cycle Cancel Notification
- Configure the following comply system properties:
    - Enable Parallel Review
    - XAJS End Point
    - Enable Document Versioning
- Configure the following admin entries:
    - APTS_Protection
    - APTS_Password
    - APTS_RetainFileNameForParallelReviewMergedDocument

Restriction

Users can end Office 365 review via email when you configure application permission flow but not delegated permission flow.

To configure remote site settings

1. Go to Setup > Security > Remote Site Settings.
2. Click **New Remote Site**.
3. Enter a remote site name in the Remote Site Name field.
4. Enter `https://login.microsoftonline.com/` in the Remote Site URL field for the Office 365 login.
5. Select the **Active** checkbox.
6. Click **Save & New**.
7. Enter a remote site name in the Remote Site Name field.
8. Enter `https://graph.microsoft.com/` in the Remote Site URL field for the MS Graph URL.
9. Select the **Active** checkbox.
10. Click **Save & New**.
11. Enter a remote site name in the Remote Site Name field.
12. Enter a remote site URL in the Remote Site URL field for the SharePoint URL.

   > ⓘ The SharePoint URL is specific to your domain and Microsoft license.

13. Select the **Active** checkbox.
14. Click **Save**.

To collect the Azure client ID and client secret from the Azure portal

1. Log in to the Azure portal as an administrator.
2. Select **Azure Active Directory**.
3. Select **App registrations**.
4. Select **New registration** and enter `Conga CLM Application`.
5. Click **Register**.
6. From the left navigation, select **Overview**.
7. Copy the Application (Client) ID.
8. From the left navigation, select **Certificates & secrets**.
9. Click **New client secret**.
10. Add a description, select the validity duration, and select **Add**.
11. Copy the value.

Configure one of the following flows in the Azure app

Delegated Permission Flow

To configure delegated permission flow

1. In the authentication tab from the Azure app that you had created in the previous configuration, add URI with the instance URL of the org and with the suffix as *apex/apttus__MSAuthorize*.
   Sample value: `https://test-tbox.my.salesforce.com/apex/apttus__MSAuthorize`
2. Select API permission under API Permission > Add permission > Microsoft Graph > Delegated Permission.
3. Provide the following permissions for Microsoft Graph APIs:
   - Directory.Read.All
   - Files.ReadWrite.All
   - Sites.Read.All
4. On the API Permissions page, click **Grant admin consent** for the permissions where **Admin consent required** is marked as Yes.

Application Permission Flow

To configure application permission flow

1. Select API permission under API Permission > Add permission > Microsoft Graph > Application Permission.
2. Provide the following permissions for Microsoft Graph APIs:
   - Directory.Read.All
   - Files.ReadWrite.All
   - Sites.Read.All
3. On the API Permissions page, click **Grant admin consent** for the permissions where **Admin consent required** is marked as Yes.

(Optional) To configure a specific SharePoint site

1. Create a SharePoint Communication Site. For more information, see Create a Site in SharePoint.

   ⓘ You must use the site name from the URI as shown in the screenshot when you are configuring SharePoint Site Office 365 Setting in CLM.

To configure the Office 365 custom settings

Restriction

You can add multiple Office 365 settings but activate only one Office 365 setting at a time.

1. Click the **App Launcher** (⊞) icon in the upper left-hand corner of the Home screen.
2. From the App Launcher, search and select Office 365 Settings.
3. Click **New**.
4. Enter the following details to connect to Office 365:
   a. **Name**: Office365
   b. **MS Login URL**: Enter the Office 365 login URL to connect to the service. To find Tenand Id, see How to find your Azure Active Directory tenant ID.
      Sample value: `https://login.microsoftonline.com/<TenantID>/oauth2/v2.0/`
   c. **MS Graph URL**: Enter the Office 365 URL to connect to the service.
      Value: `https://graph.microsoft.com/v1.0/`
   d. **Scope**: Enter the scope to be used in the Office 365 Graph API.

      > ⓘ Ensure you add appropriate values per the configured authentication flow.

      For application flow (Permit Delegation is disabled in the Office 365 setting):
      `https://graph.microsoft.com/.default`
      For delegated flow (Permit Delegation is enabled in the Office 365 setting):
      `offline_access Files.ReadWrite.All`
   e. **Client Id**: Enter the client ID. (Refer to step 7 in the previous configuration)
      Sample value: `8m7r4**d-****-4c**-b4d8-e4a6b***79b`
   f. **Client Secret**: Enter the client secret. (Refer to step 11 in the previous configuration)
      Sample value: `taiLWUY*****38&7B%400$5234c***UY%`
   g. **Show Client Secret**: Select the checkbox to expose the Client Secret field value.

h. **SharePoint Site**: Enter the Microsoft SharePoint Site you use for Office 365 review. (Ensure you do not enter the site URL. For more information, see SharePoint Site Configuration.)

Sample value: `CLMsite`

> ⓘ If no SharePoint site is configured then the system uses the organization's default site.

i. **Folder Path**: Enter the folder path to upload documents to SharePoint.

Sample value: `ContractDocuments`

> ⓘ If the folder path is blank, the system creates a folder named "Conga CLM Temp Folder" to store the documents to be reviewed.

j. **Permit Delegation**: After you log in to Microsoft, select the Permit Delegation checkbox, enabling users to grant delegate access.

> ⓘ Select the Permit Delegation checkbox only if you configured your Azure app for delegated flow.

k. **Active**: Select the Active checkbox to activate the Office 365 setting.

5. Click **Test Connection** when the setting is active to check if all the entered values are correct.

6. Click **Save**.

Disabling Clickjack Protection

When you send a document for review in Salesforce Lightning, you must disable clickjack protection (if enabled) to view Visualforce pages in Lightning.

To disable Clickjack Protection

1. Go to **Setup** > **Security** > **Session Settings**.
2. Unselect:
   - Enable clickjack protection for customer Visualforce pages with standard headers
   - Enable clickjack protection for customer Visualforce pages with headers disabled
3. Click **Save**.

Configuring Activation Settings

You can configure various admin entries to control the options on the activation page.

To control document activation

You can configure the *APTS_ActivateDocumentsSelectAll* admin entry to have all documents selected or unselected during activation. You can also configure the *APTS_ActivateDocumentsSelectable* to allow users to select or unselect documents during activation. You can configure the *APTS_ActivateDocumentsPublishAll* admin entry to turn on or off Publish toggle during activation. For more information, see Admin Entries. The following table describes the impact of *APTS_ActivateDocumentsSelectAll, APTS_ActivateDocumentsSelectable, and APTS_ActivateDocumentsPublishAll* admin entries on the activation page.

APTS_ActivateDocumentsSelectable	APTS_ActivateDocumentsSelectAll	APTS_ActivateDocumentsPublishAll	Documents are selected?	Select or unselect documents?	Publish toggle for documents?
True	True	True	Yes	Yes	On
False	True	True	Yes	No	On
True	False	True	No	Yes	On
False	True	False	Yes	Yes	Off
False	False	True	No	No	Off
False	False	False	No	No	Off

To control document publication to content repositories

You can allow users to publish documents to different content repositories by configuring the *APTS_ContentRepositoryType* admin entry. The following table describes the impact of

the *APTS_ContentRepositoryType* admin entry, publish option, and document selection during activation.

APTS_ContentRepositoryType value	Document	Publish toggle	Version-Aware agreement	Non-Version-Aware agreement
Content	Selected	On	The published document is moved to Content. The document is removed from the agreement (Document Versions).	The published document is moved to Content. The document is removed from the agreement (Notes & Attachments and Files).
		Off	The unpublished document remains in the agreement (Document Versions).	The unpublished document remains in the agreement (Notes & Attachments and Files).

APTS_ContentRepositoryType value	Document	Publish toggle	Version-Aware agreement	Non-Version-Aware agreement
Document	Selected	On	The published document is moved to Agreement Document. The document is removed from the agreement (Document Versions).	The published document is moved to Agreement Document. The document is removed from the agreement (Notes & Attachments and Files).
		Off	The unpublished document remains in agreement (Document Versions).	The unpublished document remains in agreement (Notes & Attachments and Files).

APTS_ContentRepositoryType value	Document	Publish toggle	Version-Aware agreement	Non-Version-Aware agreement
Chatter	Selected	On	The published document is moved to Chatter and Notes & Attachments and Files.	The published document is moved to Chatter and Notes & Attachments and Files.
		Off	The unpublished document remains in Document Versions.	The unpublished document remains in agreement (Notes & Attachments and Files).
None	Selected	Publish column is not visible	The document remains in Document Versions.	The document remains in the agreement (Notes & Attachments and Files).

APTS_ContentRepositoryType value	Document	Publish toggle	Version-Aware agreement	Non-Version-Aware agreement
The admin entry is not configured, deleted, invalid, or blank. ⓘ The content repository type is considered Document.	Selected	On	The published document is moved to Agreement Document. The document is removed from the agreement (Document Versions).	The published document is moved to Agreement Document. The document is removed from the agreement (Notes & Attachments and Files).

Versioning Contract Documents

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. • Creates an Offline document. • Imports an Offline document. • Generates a supporting document. • Checks in a Clean document or a document without Redlines. • Checks in a document as Final. A MAJOR version can be either a new document instance or an incremented version of a pre-existing document. For further explanation, see New Document Versus Incremented Version	Contract Requestor / Owner	1.0.0 2.0.0 3.0.0

Version Type	Document Action	User Role	Example Value
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*. For more information on Send for Review using X-Author, see X-Author for Contracts documentation.	Reviewer	1.0.1 2.0.2

To enable Contract Document Versioning for your organization, see Enabling Contract Document Versioning.

To learn how to work with Contract Document Versioning, see Contract Document Versioning.

Document Version Properties

For agreement documents, Conga CLM 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.

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.

Setting	Description
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	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.

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.
3. Click **Edit** to edit System Properties. The System Properties form is displayed.

4. 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 Contract Management 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 Conga CLM 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 will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.) To 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.

#	Property	Description
4	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: • %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:

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

After adding values, your Merge Action picklist should appear as shown in the following image:

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 Conga CLM if a specific record is using Document Versioning. When the Comply System Property **Enable Document Versioning** is enabled, the value of the Version Aware field is set to TRUE for all new agreements org-wide at the time of record creation. You can add the Version Aware flag to your Agreement layouts as a field which allows agreement editors to turn Document Versioning on or off for a specific agreement record.

Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.)

To add this field to your custom Agreement layout, refer to Salesforce documentation for Edit Page Layouts for Custom Objects.

> ⓘ 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 Managing Workflow for assistance with setting up a Workflow Rule in Salesforce.
2. Specify your Workflow Rule Action as a "Field Update" (the rule will update the Version Aware field).
3. Use **Apttus__APTS_Agreement__c.Apttus__VersionAware__c** as the field value in your rule.

Example: Enable Version Aware Field for all Statement of Work (SOW) Agreements

Scenario: Your organization has decided not to enable Contract Document Versioning globally. However, you do want all new SOW agreements to be Version Aware.

Solution: Create a new Workflow Rule as detailed above.

1. Define your criteria as "Agreement: Record Type equals SOW."

Specify the workflow actions that will be triggered when the rule criteria are met. See an example	
Rule Criteria	Agreement: Record Type EQUALS SOW
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

2. Specify your Workflow Rule Action to make the Version Aware flag *true* when the criteria are met.

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.

3. Validate your rule. When you renew an agreement, the Version Aware field should NOT be checked.

Configuring Document Finder

Document Finder helps your contract managers, salespersons and legal teams to easily filter and find agreement documents directly from an agreement record. Follow the instructions on this page to set up Document Finder for use with your agreements.

Enable Contract Document Versioning

To use keywords/tags defined in your org or created from check-in actions in X-Author Contracts requires Contract Document Versioning be enabled. When you are working with version aware records, you can take full advantage of search by keywords/tags and by document versions.

To learn how to enable Contract Document Versioning, refer to Enabling Contract Document Versioning.

Add Document Finder Visualforce Page to User Profiles

To grant Document Finder access to a user, you must add the Visualforce Page to the list of Enabled Visualforce Pages on their corresponding User Profile.

1. Go to **Setup > Administer > Manage Users > Profiles**.

2. Click on the Profile corresponding to the user who needs access.

3. Click **Edit** under Enabled Visualforce Page Access.

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.

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, consider modifying 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.
4. Enter "Document Finder" as the **Section Name** and choose a **1-Column** layout.
5. Click **OK**. The Document Finder section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.
7. Click-and-drag the **Document Finder** Visualforce Page onto the section you just created.
8. Click **Save** to save the Agreement page layout.
9. Repeat these steps for all Agreement layouts that will use Document Finder.

(Optional) Configure Default Tags

You can configure the Comply System Property **Default Document Tags** to define a set of comma-separated tags which will be automatically available to users who perform a search in Document Finder. X-author users can also choose from the same set of tags at document check-in, applying any of these default tags to an agreement document as part of the check-in process.

To configure the Default Document Tags system property:

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

4. Enter your desired default tags as comma-separated values for the **Default Document Tags** system property.
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.
X-Author users can also make use of these tags during check-in. For more information, see X-Author for Contracts documentation.

Managing Workflow

Workflow is a series of activities that automate tasks, email alerts, field updates, and outbound messages. This section covers the following topics:

- Creating New Workflow Rules
- Automating the Process Through Workflow Rules
- Creating a Workflow Task
- Creating Email Alerts
- Defining Field Updates
- Validating Workflows

Creating New Workflow Rules

Workflow rules give you the ability to enforce key business processes easily without needing to write any code. You can automate your organization's standard processes by configuring workflow rules.

To create new rules, refer to the following standard Salesforce Help:

1. Selecting the Agreement object to which the workflow rule applies
2. Configuring the workflow rule settings and criteria
3. Configuring the workflow actions
4. Activating the workflow rule

Watch a demo: Creating a new workflow rule.

Automating the Process Through Workflow Rules

In this fast-paced world time is money for your organization. You can save time by automating the processes by configuring workflow. Also, you can help make operations more efficient with standardized internal procedures and automated business processes.

To automatically perform the procedures and processes, you must do settings based on your workflow requirements.

Design workflow actions, and then configure workflow rules, and approval processes that determine the conditions under which actions are executed.

Workflow is a series of activities that automates the following types of actions:

Actions	Description
Tasks	A task is a type of workflow action by which you can determine the details of an assignment given to a specified user by a workflow rule or approval process. Create tasks and then associate them with the workflow rules or approval processes that will trigger them. When a workflow rule or approval process meets the business conditions that you set up, any tasks associated with it are assigned to designated users with the Subject, Status, Priority, and Due Date of the workflow task.
Email Alerts	Email alerts are emails generated by a workflow rule or approval process and sent to intended recipients whenever specific business actions trigger the workflow rule or approval process. Email alerts contain the standard text and list of recipients for an email. It is recommended that you specify an email template for email alerts.
Field Updates	Field updates are actions associated with workflow rules or approval processes. With Field updates, you can automatically specify a field value.
Outbound Messages	Outbound messages send a secure configurable API message in XML format to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

Creating a Workflow Task

1. Click **Create > Workflow & Approvals > Tasks**.
2. Click **New Task**.
3. Select a record type and click **Next**.

> ⓘ **Note**
>
> You can associate Task with workflow rules or approval processes for the same object type.

4. Perform the following steps to configure the task:
   a. Select an **Assignee**.
   b. Enter a subject for the task.
   c. Enter a **Unique Name**.
   d. Specify a due date, status, and priority.
   e. Check **Notify Assignee** to send an email notification when the task is assigned.
   f. Check **Protected Component** to mark the task as protected.
   g. Enter any comments to add to the task.
   h. Click **Save**.

Creating Email Alerts

1. Click **CreateWorkflow & ApprovalsEmail Alerts**.
2. Click **New Email Alert**.
3. Perform the following steps to configure the email alert:
   a. Enter a Description.
   b. Enter a Unique Name.
   c. Select the Object for the email alert.

   > ⓘ **Note**
   >
   > This is used when you generate merge field values for email templates with workflow rules and approval processes. Also, you can define the recipients of this email alert using contact and user lookup fields that are relevant to that object.

   d. Choose an email template from the lookup.
   e. If required, select the **Protected Component** check box to mark the alert as protected if it is part of a Managed - Released package.
   f. From the Recipient Type list, select who all (type of users) should get your email alerts.
   g. From the Available Recipients list, select the recipients who should receive this email alert in the Available Recipients list and click Add to include in the Selected Recipients list.
   h. Enter up to five additional email addresses.

  i. Use the From Email Address field to the email address of the default workflow user.

> ⓘ **Note**
>
> Selecting Make this address the default From email address for this object's email alerts overrides the From Email Address for all email alerts associated with that object.

  j. Click **Save**.

Defining Field Updates

1. Click **CreateWorkflow & Approvals Field Updates**.
2. Click **New Field Updates**.
3. Perform the following steps to configure the field update and complete the workflow:
   a. Enter a **Name** and **Unique Name** for this field update.
   b. Type the Description for the 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**.

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.

Migrating Attachments to Files

Attachments to Files Migration feature enables users to convert all the documents, which are available as **Attachments** format, to the **File** format. You can either convert a single Attachment or bulk Attachments type to the File type.

Migration process consists of the following two tasks:

1. Converting Attachments to File
2. Deleting Converted Attachments

Prerequisites

For converting attachments to files and deleting attachments, ensure you have met the following requirements:

- Set the *APTS_SkipFileSplitWhileSavingFile* admin entry to true when all of the following conditions are met.
  - You are upgrading to Spring '21 or a later version of CLM, and
  - You are migrating Attachments that are greater than 10 MB in size to Files. For more information, see Admin Entries.
- The migration tool is installed.

  > ⓘ You can use the free **Magic Mover for Notes and Attachments** tool from Salesforce to do bulk conversions of attachments to Salesforce Files. For more information see the Magic Mover Help page. Note that the tool is provided by Salesforce and can be used with Conga CLM to migrate notes and attachments.

- The following latest versions are installed:
  - Contract Management
  - Docusign/Echosign
  - XAC
  - ContentSearch

Key Points To Remember

You must remember the following key points, before starting the migration:

- The current implementation does not support user-level flag **Files Enable.** It is the Org wide flag.
- The current version does not support **Template** in files, it should be in **Attachments**.
- **Attachment Migration trigger** needs to be created before running the Migration Tool.

> ⓘ **Note**
>
> After **Files** are migrated, you cannot switch back to the **Attachment** mode.

Converting Attachments to Files

Converting Attachments to Files feature enables a user to convert documents, which are saved as attachments, to files.

Restrictions

The migration process has the following limitations:

- You can convert only 2,00,000 attachments per day per Production Org.
- Existing customer can start migration only after upgrading to the Contract Management new release version and before selecting the **Enable File** setting.
- Time to complete migration depends on the number of attachments getting converted to files.
- If the number of agreements is greater than 2,00,000 then migration and downtime should be planned accordingly.

To convert attachments to files

1. Go to the Salesforce.com App Menu and select **Attachments and Notes migrator.**
2. Click **Attachments to Files**. The Attachments to Files page appears.
   Figure: Attachments to Files Page
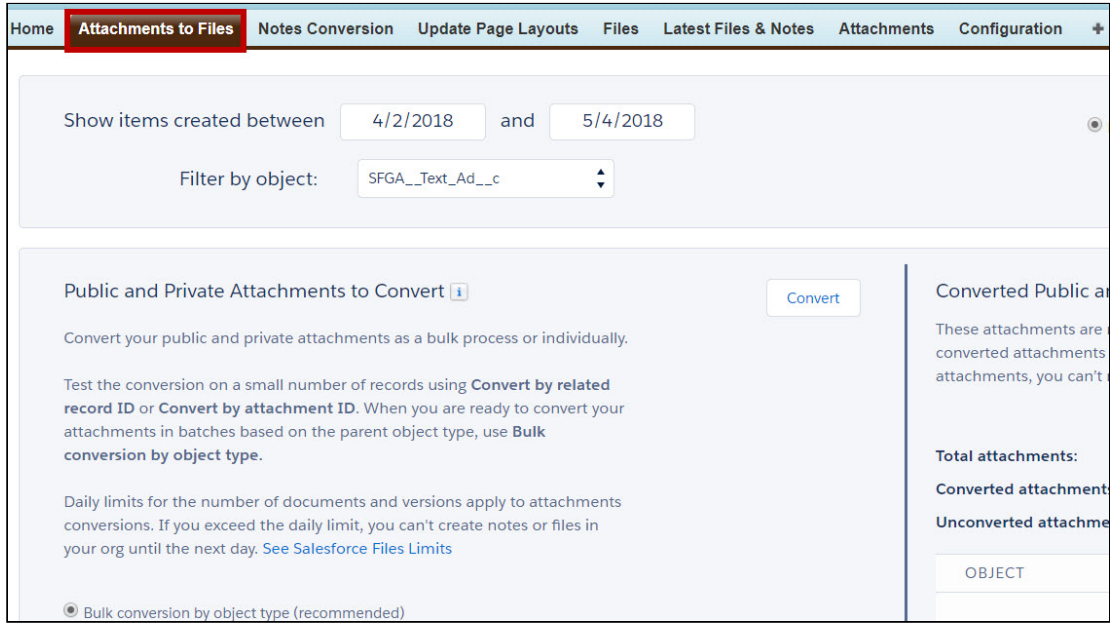
3. Select the required object from the **Filter by object** drop-down list as shown in the below figure.

Figure: Filter by object
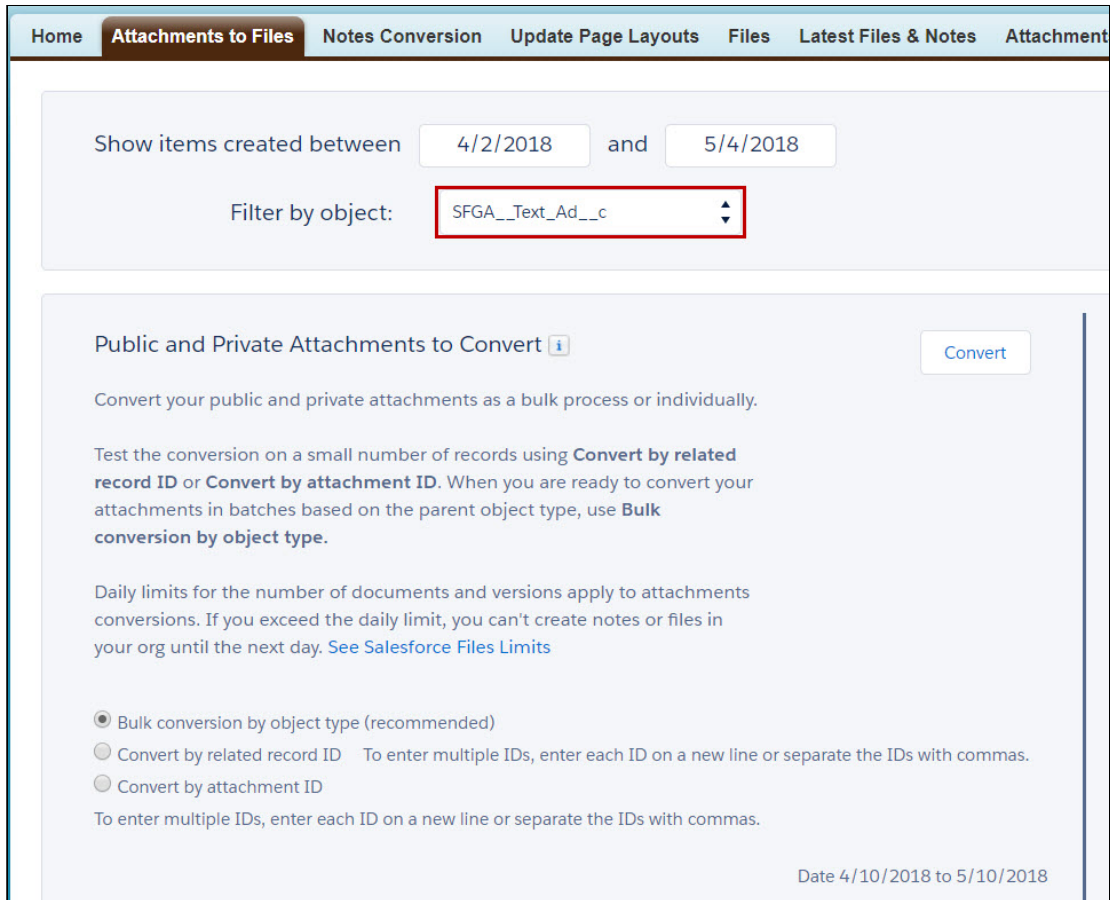
4. Select the **Bulk conversion by object type** radio button, as shown in the below image, from the **Public and Private Attachments to Convert** section.
Figure: Bulk Conversion

You can also convert attachments to files by selecting the followings:

Convert by related record ID	You can convert attachments using **Record ID**. Users can enter multiple IDs separated by commas or each ID in a separate line.
Convert by attachment ID	You can convert attachments using **Attachment ID**. Users can enter multiple IDs separated by commas or each ID in a separate line.

> ⓘ **Note**
>
> Users can also filter attachments created in a specific time period using **Show items created between, by Created Date, and by Last Modified Date** options

5. Click **Convert.**
Figure: Convert
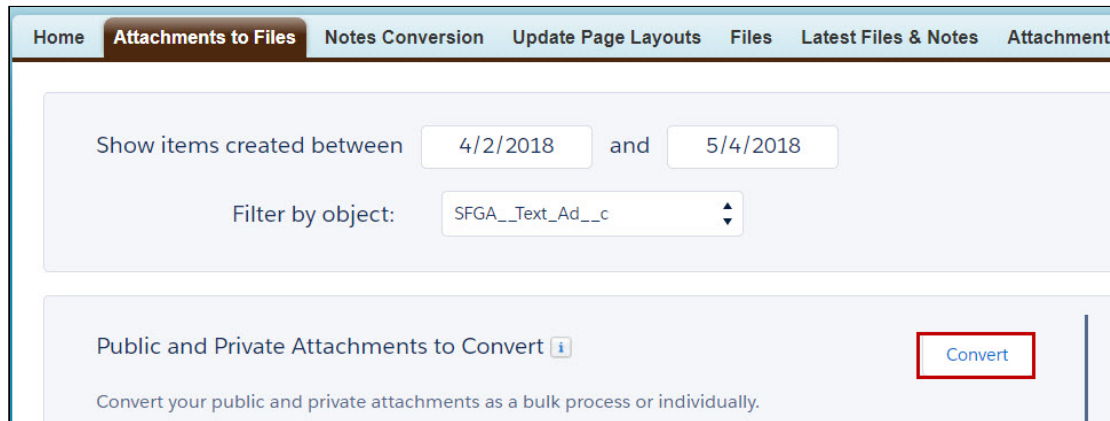
A pop-up appears displaying the below message as shown in the below figure.

Figure: Convert Attachment
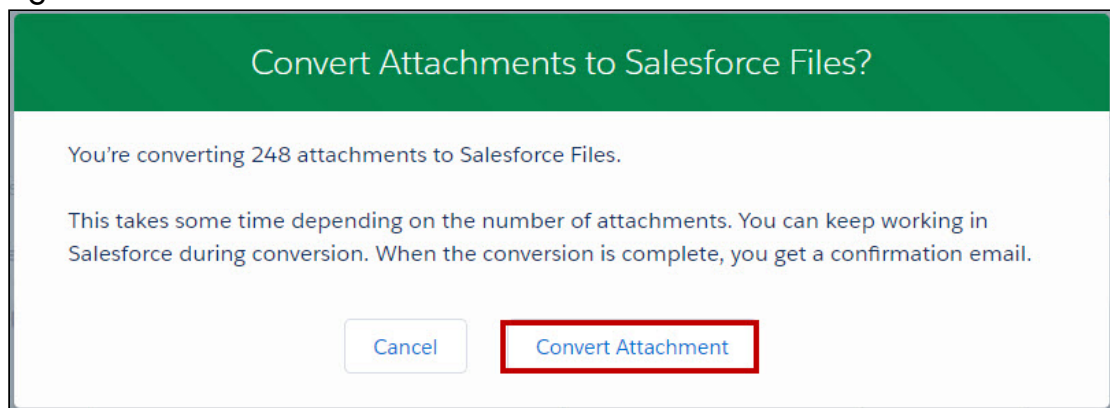
6. Click C**onvert Attachment** to convert the attachments or click **Cancel** to cancel the conversion.

7. After attachments are converted to files, you will get an email which displays a message as highlighted in the below figure.

Figure: Email Message
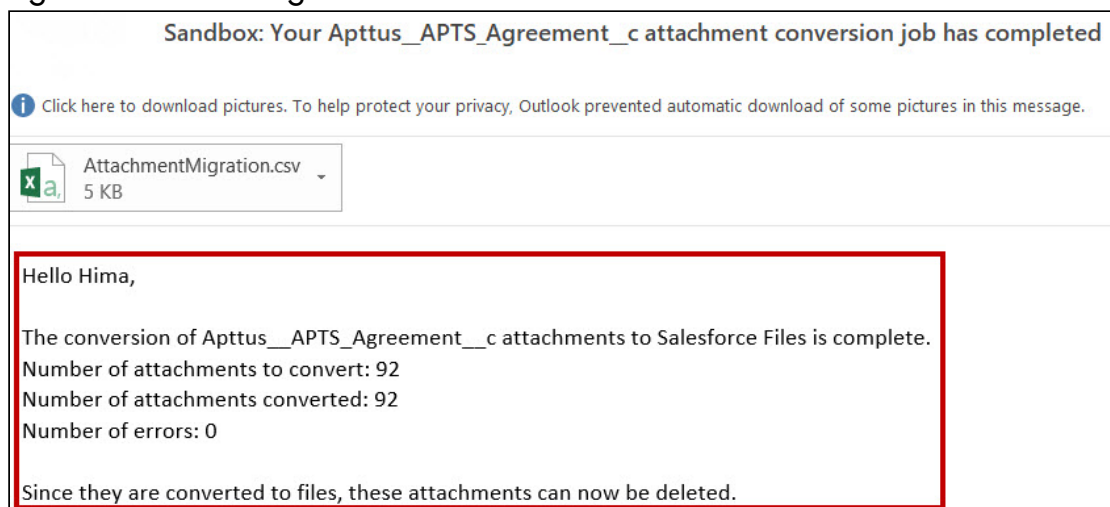
The conversion of attachments to files is completed.

Deleting Attachments

Delete attachments option enables users to delete the attachments which are converted to files.

To delete attachments

1. Go to the Salesforce.com App Menu and select **Attachments and Notes migrator.**
2. Click **Attachments to Files.** The Attachments to Files page appears.
   Figure: Attachments to Files Page
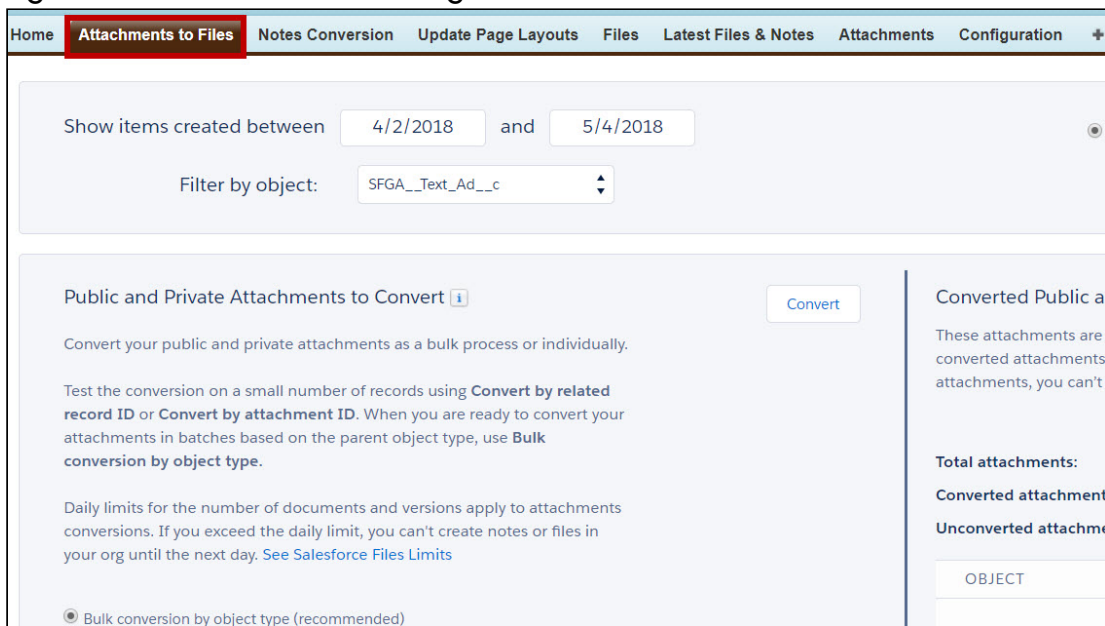
3. Click **Refresh** in the **Converted Public and Private Attachments** section, as shown in the below figure.

4. Converted attachments appear with details as shown in the below figure.

Figure: Converted Attachments with Details

5. Click **Delete** icon to delete the attachments.
6. A pop-up appears displaying a message given in the below figure.

Figure: Delete Converted Attachments

7. Click **Delete** to delete converted attachments or click **Cancel** to cancel it.
   Your selected attachments are deleted.

> ⓘ **Note**
>
> Ensure **Enable File** setting is selected after the migration process is
> completed.

Migrating from Notes and Attachments to Files in Lightning

When you switch to Lightning, any files you upload to a record will be saved as Salesforce Files, rather than as attachments.

To ensure that your org is using Files, enable the following settings:

- Go to **Setup** > **General Settings**. Select **Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments**.
- Go to **Setup** > **Custom Settings** > **Comply System Properties**. Select **Enable Files**.

Please note the following:

- After you enable Files, uploads are stored on both the "Files" and "Notes And Attachments" related lists.
- The "Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments" setting causes files that are uploaded to be stored as the "File" type rather than the "Attachment" type.

Configuring Agreement Document Protection

The document protection has following three phases:

- **Enabling Document Protection**
  To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called Quotes to store data for your company's sales quotes.
- **Defining Protection Password**
  Create a custom object record to define password protection for your document.

- **Setting Up Agreement Protection**
  To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document. For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

User Permissions Needed	
To enable document protection:	Admin: Create, Edit
To create an agreement protection:	Agreement Protection: Create, Edit

Enabling Document Protection

To enable document protection, you must first create a custom object record. A custom object record stores information that is unique and important to you and your organization. For example, your organization may use a custom object called Quotes to store data for your company's sales quotes.

To enable document protection

1. Click + and click **Admin.**
2. Click **New** and type APTS_Protection in the name field.
3. In the **Value** field, enter 1 and click **Save.**

A new custom object record APTS_Protection is created. After you have created a new custom object record, you can automatically associate the new custom object with another record if your administrator has defined relationships to other types of records.

> ⓘ 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.

> ⓘ 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.

   > ⓘ You need to configure the Merge Documents option. It is not available by default in the Action picklist. Navigate to **Setup** > **Object Manager** > **Agreement Protection** > **Fields & Relationships** > **Action**. In the Values section, click **New** and enter Merge Documents.

5. Select one of the following protection types:
   - **Ignore:** With this option, protection settings can be by-passed.

- **Prompt:** With this option, protection level can be selected at the generation time.
- **Automatic:** With this option, protection level has to be selected at the configuration time.
  You can define protection level for the Automatic option. Following are the protection levels for the Automatic protection type:
    - Full access: This option provides complete access to a user's profile to perform the selected action.
    - Insert comments and tracked changes only: This option allows a user's profile to insert comments in the agreement document along with tracking the changes made by any other user.
    - Insert comments only: This option allows a user's profile to insert only comments in the agreement document.
    - Fill in form fields only: This option allows a user's profile to only fill in the form fields inside the agreement document.
    - Read only: This option gives only the read access to the user of the entered
- **Unprotect:** With this option for the selected action, the password protected document can be unprotected for certain actions, provided the password is same as the one set in the admin object properties.

> ⓘ This option is not available for Generate/Regenerate actions.

6. Click **Save.**

Use Case for Setting Up Agreement Document Protection

This topic describes the use case for setting up an agreement document protection.

> ⓘ This use case gives one example on how to set up protection level for a document and restrict action levels of a specific user. You might use this functionality differently, depending on your business case.

This use case describes how to set up protection level for a document and restrict action levels of a specific user. For example, the **Read Only** protection level provides read-only access, while the **Insert Comments and Track Changes Only** level captures modifications made in the document generated by a specific user.

In this case, a System Administrator can specify that a user with the Sales profile is allowed full document access when generating or re-generating a document, but **Track Changes** is enabled when the user sends a document for review.

Prerequisites:

System Administrator must apply the appropriate settings before enabling the Agreement Protection; protection should be turned **on** and an unlock password must be created.

To set up protection or restrict access to your document, please perform the following steps:

1. Select the **Agreement Protection** tab.
   Agreement Protection page is displayed.
2. Click **New.**
   Agreement Protection Edit page is displayed.
3. Enter a description in the **Description** field.
4. Enter profile name in the **Profile Name** field.
5. Select an action from the **Action** drop-down list.
6. Select Automatic from the **Protection Type** drop-down list.
7. Select **Insert comments and tracked changes only** in the Protection Level picklist.
8. Click **Save.**

Result:

You have enabled Track Changes for the generated Word document, which cannot be disabled by a user who will edit the agreement document unless the user enters the Unlock password which is set by the Administrator.

PDF Security for Agreement Documents

Conga CLM 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.
- Checked-in from X-Author for Contracts as Final-to be signed with Create PDF attachment option selected.

Understanding PDF Security

When you enforce security on a PDF document, you typically have the option of enabling or disabling certain restrictions. To view the set of possible restrictions for a PDF from Acrobat Reader, go to **File > Properties**. You can view the current restrictions under "Document Restrictions Summary."
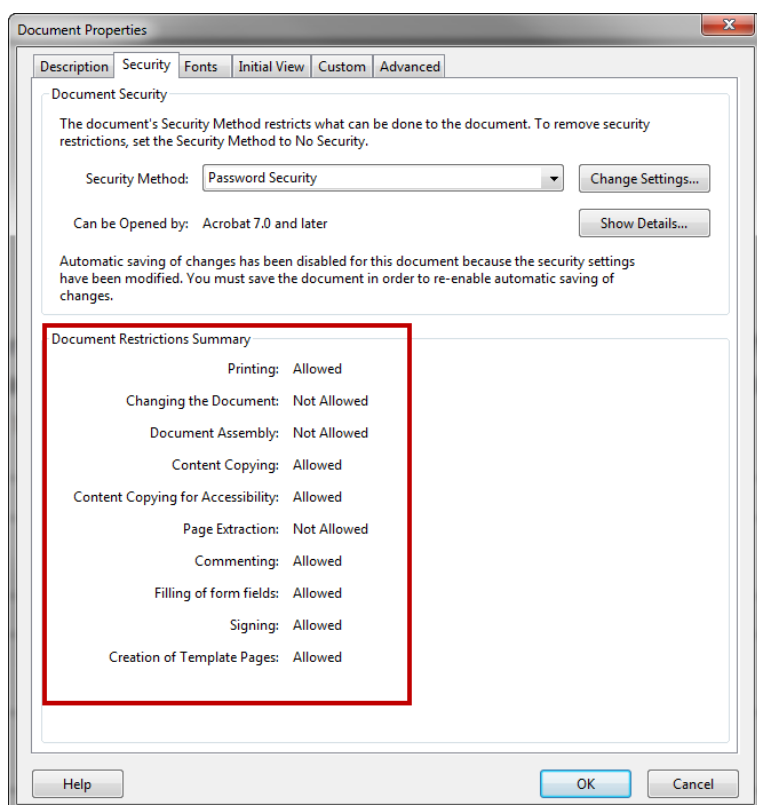
You can control the following document restrictions for PDFs generated in Conga CLM:

- Printing
- Changing the document
- Content Copying
- Document Assembly
- Commenting
- Filling of form fields

> ⓘ All generated PDFs user 128-bit AES encryption.

Defining Comply System Properties

1. Go to **Setup > Develop > Custom Settings**.

2. Click **Manage** next to *Comply System Properties*
3. Click **Edit** next to *System Properties* and do the following:
    a. Select **Enable PDF Security**.
    b. Enter the desired value for **PDF Owner Password**.
    c. Click **Save.**

Defining Admin Properties

1. Click the **Admin** tab.
2. Select **APTS_ComplyConfig** and click **Edit**.
3. Enter the following code between the <ComplyConfig> and </ComplyConfig> tags.

```
<PDFSecurityDefault>
<CanPrint>false</CanPrint>
<CanCopy>false</CanCopy>
<CanChange>false</CanChange>
<CanAddNotes>true</CanAddNotes>
<CanFillFields>true</CanFillFields>
<CanAssemble>true</CanAssemble>
</PDFSecurityDefault>
```

By using the above code example, you can restrict the user from printing, copying, and modifying the PDF. To print, copy, and modify the PDF, the user must provide the password that you have configured in the comply system property. Depending on your requirement, you can adjust the field values.

4. Click **Save.**

All generated PDFs will now have security enabled.

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 Retention Policy Schema.

Retention Date

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

Record Retention Authorized Users

You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.

Purge Notification

You can schedule a report to run periodically to identify records eligible for purging. The retention date field in the agreement provides the selection criteria. A sample report is provided which can use be used as the basis for creating the report.

Purge Agreements

The Purge Agreements Visualforce page allows the authorized user to search records eligible to be purged based on the retention date combined with other filter criteria. It also provides a scrollable record set to view.

Creating Retention Policies

The Retention Policy object contains the policy details. The policy specifications are contained in an XML format and maintained using a Visualforce page. The policy header information is maintained using a standard Salesforce page. For details on the Retention Policy XML schema, refer to 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	Optional
Business Object	Indicates the business object governed by the policy	Required – Apttus__APTS_Agreement__c

Field Name	Description	Values/Notes
Policy Spec	The policy specification	Maintained by a VF page
Sequence	The policy sequence	Required
Active	Indicates whether the policy is active	Inactive policies are ignored. This is selected by default

The policy specification is maintained using a Visualforce page. The policy header fields such as Name, Description, Sequence, Active indicator and so on, can be maintained using a standard Salesforce page.

To create a retention policy

User Permissions Needed	
To create and edit retention policies:	Retention Policy: Create, Edit.
	Agreement: Edit.

1. Click **Retention Policies** > **New**.
2. Enter details in one or more required fields and click **Save**. Optionally, you can click **Save & New** to save and create a new retention policy.
   a. **Name**: Policy for NDA, CDA contracts
   b. **Sequence**: 2
   c. **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 to open the Edit Policy Specification page.
3. In the Filter section, select the following options.

    a. From the Field dropdown, select a field, select an operator, and enter a value for the field.

    b. (*Optional*) If required, add more filters.

    c. (*Optional*) Click **Add Row** to add more rows.

    d. Click Advanced Options to add advanced filter conditions.
       For example, (1 OR 2) AND 3 AND NOT 4.

4. In the Rule section, select the following options.

    a. Select the Retain Forever checkbox to retain the agreements matching the filter criteria forever. When you select the checkbox other options in the Rule section are not visible.

    b. In the Period field, enter the number of years. You can also select Days or Months according to your requirement.

    c. In the After Date dropdown, select a date after which the retention period starts.

5. Click **Ok**.

> **ⓘ Note**
>
> The RetentionPolicyEdit Visualforce page enables the filter creation and a rule according to the Retention Policy Schema.

Calculating Retention Date

The retention date calculation is done periodically using a batch apex class. The batch apex sequences through all the active retention policies, select applicable business objects using the filters, compute the retention date and update the object.

An activity history record is written to the agreement with the policy information. The process terminates on two conditions- when either there are no more business objects to process, or all the policies have been applied. The process is scheduled using the RetentionDateCalcJobScheduler Apex scheduler class. Due to governor limits, each policy processes a maximum of 5000 records during each invocation.

To calculate a retention date

A Retention Policy must have been created.

1. Click **Setup** > **Develop** > **Apex Classes** > **Schedule Apex**.
2. Enter the following information to configure the job parameters.
   a. **Job Name**: Retention Calc Job
   b. **Apex Class**: RetentionDateCalcJobScheduler
   c. **Frequency**: 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**.

After you have done the job of calculating a retention date, you can monitor the progress of the job on the All Scheduled Jobs page.

Once the job has completed, you can see specifics about the job (such as whether it passed or failed, how long it took to process, the number of records process, and so on) on the Apex Jobs page.

Recording Retention Authorized Users

You can use the RecordRetentionUsers public group to identify the users who are recipients of the purge notification report and authorized to selectively purge records.
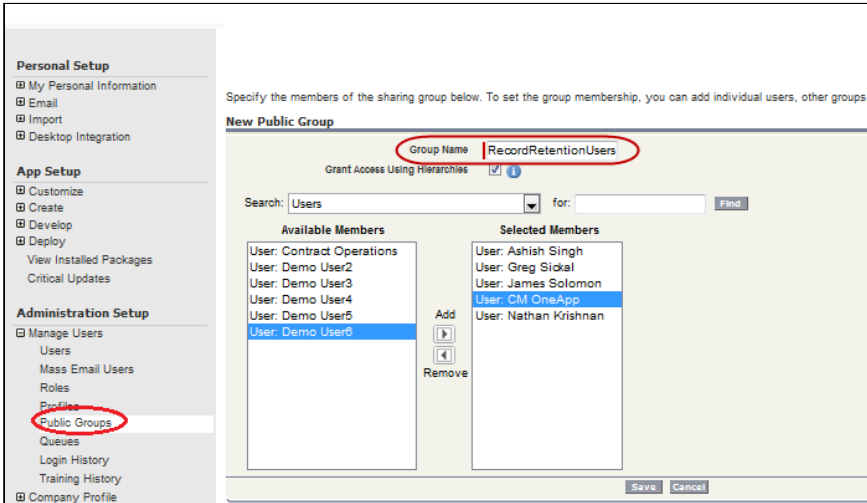
Sending Purge Notification

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:

1. Create a public folder to hold the purge notification report
2. Create a new report using the report builder
3. Edit report properties and save the report
4. Schedule the report and send notification

Creating a Public Folder

User Permissions Needed	
To create, edit, or delete public document folders:	"Manage Public Documents"
To create, edit, and delete public email template folders:	"Manage Public Templates"
To create, edit, and delete public report folders:	"Manage Public Reports"
To create, edit, and delete public dashboard folders:	"Manage Dashboards" AND "View All Data"

1. Go to the **Reports** tab.
2. Click **New Report Folder**.
3. Enter a **Report Folder Label**. For example, Record Retention Report.
4. The **Folder Unique Name** is entered automatically when you type the folder label. If you have the Customize Application permission, enter a unique name to be used by the API and managed packages.
5. Choose a **Public Folder Access** option. Select read/write if you want users to be able to change the folder contents. A read-only folder can be visible to users but they cannot change its contents.
6. Select an unfiled report, dashboard, or template and click **Add** to store it in the new folder. Skip this step for document folders.
7. Choose a folder visibility option.
8. Choose **Public Groups** from the Search drop-down list.

   > ⓘ **Note**
   >
   > When you share a folder with a group, managers of the group members have no access to the folder unless those managers are also members of the group.

9. If the Available for Sharing list does not immediately display the desired value, enter search criteria and click **Find**.
10. Select the desired value from the Available for Sharing list and click **Add** to move the value to the Shared To list.
11. Click **Save**.
    A folder is created. You can create a new report using Report Builder.

Creating a New Report Using the Report Builder

1. On the Reports tab, select the report type and click **Create**.
2. Enter the Filters and Fields.
3. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks to customize and preview your report. Change the report format and display options, or add a chart. The preview shows only a limited number of records. Run the report to see all your results.
   You have created report fields and filters, and previewed your report with some of the data. You can edit report properties.

Editing Report Properties

1. On the Reports tab, select the report and click **Edit**.
2. Click the **Report Properties** tab.
3. Edit the report properties and click **Save**.
   A report is edited and saved. You can also schedule the report.

Scheduling a Report

You must have the Schedule Reports permission to schedule reports.

1. On the Reports tab, click an existing report name.
2. From the Run Report drop-down, click **Schedule Future Runs**. If you're creating a new report, you are asked to save the report with a name and in a folder before scheduling.
3. On the Schedule Report page, specify a Running User who has access to the folder where the report is stored.
   If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.
   The access level of the running user determines what other users, including portal users, see when they receive the scheduled report run results. You need the "View All Data" permission to specify a running user other than yourself.
4. Select an email setting:

Select	To
To me	Send the report to your email address specified on your user profile.
To me and/or others	Email the report to additional users.

You can send reports only to email addresses included on Salesforce user records. When portal users receive emailed reports, they see the same data as the running user set in the report schedule. If you have the 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.

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. To access the page, click + and select Purge Agreements.

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 retention policy:

```
1   <-- Description:
2       Defines schema RetentionPolicy
3   -->
4   <xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema" elementFormDefault="
    unqualified" attributeFormDefault="unqualified">
5       <xs:element name="RetentionPolicy" type="RetentionPolicyType">
6           <xs:annotation>
7               <xs:documentation>Retention Policy</xs:documentation>
8           </xs:annotation>
9       </xs:element>
10      <!-- retention policy -->
11      <xs:complexType name="RetentionPolicyType">
```

```
12              <xs:sequence>
13                  <xs:element name="Filter" type="FilterType" minOccurs="0">
14                      <xs:annotation>
15                          <xs:documentation>The record filter</xs:documentation>
16                      </xs:annotation>
17                  </xs:element>
18                  <xs:element name="Rule" type="RuleType" minOccurs="0">
19                      <xs:annotation>
20                          <xs:documentation>The retention rule</
xs:documentation>
21                      </xs:annotation>
22                  </xs:element>
23              </xs:sequence>
24          </xs:complexType>
25          <!-- filter -->
26          <xs:complexType name="FilterType">
27              <xs:sequence>
28                  <xs:element name="Predicates" type="PredicateCollType">
29                      <xs:annotation>
30                          <xs:documentation>The filter predicates</
xs:documentation>
31                      </xs:annotation>
32                  </xs:element>
33                  <xs:element name="ConditionExpr" type="xs:string">
34                      <xs:annotation>
35                          <xs:documentation>The filter expression</
xs:documentation>
36                      </xs:annotation>
37                  </xs:element>
38              </xs:sequence>
39          </xs:complexType>
40          <!-- rule type -->
41          <xs:complexType name="RuleType">
42              <xs:sequence>
43                  <xs:element name="RetainForever" type="xs:boolean">
44                      <xs:annotation>
45                          <xs:documentation>Retain forever indicator</
xs:documentation>
46                      </xs:annotation>
47                  </xs:element>
48                  <xs:element name="RetainFor" type="RetainForType" minOccurs="0
">
49                      <xs:annotation>
```

```
50                    <xs:documentation>Retain for</xs:documentation>
51                </xs:annotation>
52            </xs:element>
53        </xs:sequence>
54    </xs:complexType>
55    <!-- retain for -->
56    <xs:complexType name="RetainForType">
57        <xs:sequence>
58            <xs:element name="Period" type="RetentionPeriodType">
59                <xs:annotation>
60                    <xs:documentation>The retention period</
    xs:documentation>
61                </xs:annotation>
62            </xs:element>
63            <xs:element name="AfterDate" type="AfterDateType">
64                <xs:annotation>
65                    <xs:documentation>The after date</xs:documentation>
66                </xs:annotation>
67            </xs:element>
68        </xs:sequence>
69    </xs:complexType>
70    <!-- retention period -->
71    <xs:complexType name="RetentionPeriodType">
72        <xs:simpleContent>
73            <xs:extension base="xs:nonNegativeInteger">
74                <xs:attribute name="uom" type="PeriodUOMType">
75                    <xs:annotation>
76                        <xs:documentation>Retention period</
    xs:documentation>
77                    </xs:annotation>
78                </xs:attribute>
79            </xs:extension>
80        </xs:simpleContent>
81    </xs:complexType>
82    <!-- after date -->
83    <xs:complexType name="AfterDateType">
84        <xs:sequence>
85            <xs:element name="FieldName" type="xs:string">
86                <xs:annotation>
87                    <xs:documentation>Field name</xs:documentation>
88                </xs:annotation>
89            </xs:element>
90            <xs:element name="FieldLabel" type="xs:string">
91                <xs:annotation>
92                        <xs:documentation>Field label</xs:documentation>
```

```
 93                    </xs:annotation>
 94                </xs:element>
 95            </xs:sequence>
 96        </xs:complexType>
 97        <!-- predicate collection -->
 98        <xs:complexType name="PredicateCollType">
 99            <xs:sequence>
100                <xs:element name="Predicate" type="PredicateType" maxOccurs="u
     nbounded">
101                    <xs:annotation>
102                        <xs:documentation>The predicate</xs:documentation>
103                    </xs:annotation>
104                </xs:element>
105            </xs:sequence>
106        </xs:complexType>
107        <!-- predicate -->
108        <xs:complexType name="PredicateType">
109            <xs:sequence>
110                <xs:element name="RowNum" type="xs:positiveInteger">
111                    <xs:annotation>
112                        <xs:documentation>Row number</xs:documentation>
113                    </xs:annotation>
114                </xs:element>
115                <xs:element name="FieldName" type="xs:string">
116                    <xs:annotation>
117                        <xs:documentation>Field name</xs:documentation>
118                    </xs:annotation>
119                </xs:element>
120                <xs:element name="FieldLabel" type="xs:string">
121                    <xs:annotation>
122                        <xs:documentation>Field label</xs:documentation>
123                    </xs:annotation>
124                </xs:element>
125                <xs:element name="FieldType" type="xs:string">
126                    <xs:annotation>
127                        <xs:documentation>Field type</xs:documentation>
128                    </xs:annotation>
129                </xs:element>
130                <xs:element name="CompOper" type="xs:string">
131                    <xs:annotation>
132                        <xs:documentation>Comparison operator</
     xs:documentation>
133                    </xs:annotation>
```

```
134                    </xs:element>
135                    <xs:element name="FieldValue" type="xs:string">
136                        <xs:annotation>
137                            <xs:documentation>Field value</xs:documentation>
138                        </xs:annotation>
139                    </xs:element>
140                    <xs:element name="BoolOper" type="xs:string">
141                        <xs:annotation>
142                            <xs:documentation>Boolean operator</xs:documentation>
143                        </xs:annotation>
144                    </xs:element>
145                </xs:sequence>
146            </xs:complexType>
147            <!-- period uom -->
148            <xs:simpleType name="PeriodUOMType">
149                <xs:restriction base="xs:string">
150                    <xs:enumeration value="Days"/>
151                    <xs:enumeration value="Months"/>
152                    <xs:enumeration value="Years"/>
153                </xs:restriction>
154            </xs:simpleType>
155        </xs:schema>
```

Contract Wizard

Use the 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:

- <u>Wizard Designs</u> – 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.

- <u>Wizard Component</u> **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.

Getting Started with the Wizard Designer

A Wizard Design can be as complex or simple as required, allowing your users to create a basic records or populate second and third-level items conditionally based on input or step rules.

A Wizard Design is comprised of the following key components:

- **Inputs** – Input are the primary wizard component of any wizard. They are the questions and instructions that you provide to the end users of the wizard at runtime. The values received from the end user are stored as Inputs. For example, you might create an input that requires users to select options from a picklist, such as a Business Function or Agreement Start and End dates. Inputs are reusable, so you can use them in as many steps as you want to.
- **Steps** – Inputs are placed in Steps in the desired sequence for runtime use. Steps will also contain rules which are used to designate the navigation flow, the object and submission actions, which are determined and executed based on the end user responses at runtime.
- **Step Input Rules** – These rules allow you to configure rules and expressions for your Inputs at Wizard runtime. Input rule types can be configured to enable/disable or show/hide Inputs, or to conditionally determine the focus object of the Wizard (e.g., Agreement) or conditionally determine the record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.), or to set the value of one input based on the value of other inputs.

- **Wizard Step Rules** – These rules control the flow of Wizard steps at runtime. You can create "GoTo" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

The following sections describe the Wizard design process, from initial settings to input and steps, including guidance on how to create your own Inputs and Steps during design and how to use and maintain the Wizard Component Library. The Agreement object is used as the focus object in most Wizard examples, but the same instructions can be used to create a Wizard based on **Account, Opportunity** or any **custom Salesforce object**.

Creating a New Wizard Design

The following sections describe the Wizard Design process. The process is comprised of several steps:

- Configure Wizard Settings and Add Steps
- Create Steps for the Wizard (optional)
- Configure Step Input Rules
- Configure Wizard Design Step Rules
- Activate the Wizard

Configuring Wizard Settings

The first step in designing a Wizard is to define the basic settings for your Wizard, including the name, description and other search properties, as well as the **Context** (for one Object or All Objects) and the **Start Step**.

In this step you also define the Static Resource location and CSS file for any branding and/or banner logo you want to add to your Wizard (see the table below). For information on how to add static resources to your Salesforce org, refer to Salesforce documentation on Using Static Resources. Any Static Resource used with the Contract Wizard must contain all files in an **application/zip** format.

> ⓘ Hint: Click an image on this page to enlarge the view.

To configure Wizard Settings

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and three tabs unique to the Contract Wizard: Wizards, Wizard Designs and Wizard Component Library.
2. Navigate to the **Wizard Designs** tab (click **+** and add the tab if it does not already exist).
3. Click **New Wizard Design** to open a new Wizard Design form displaying fields for Wizard Settings.
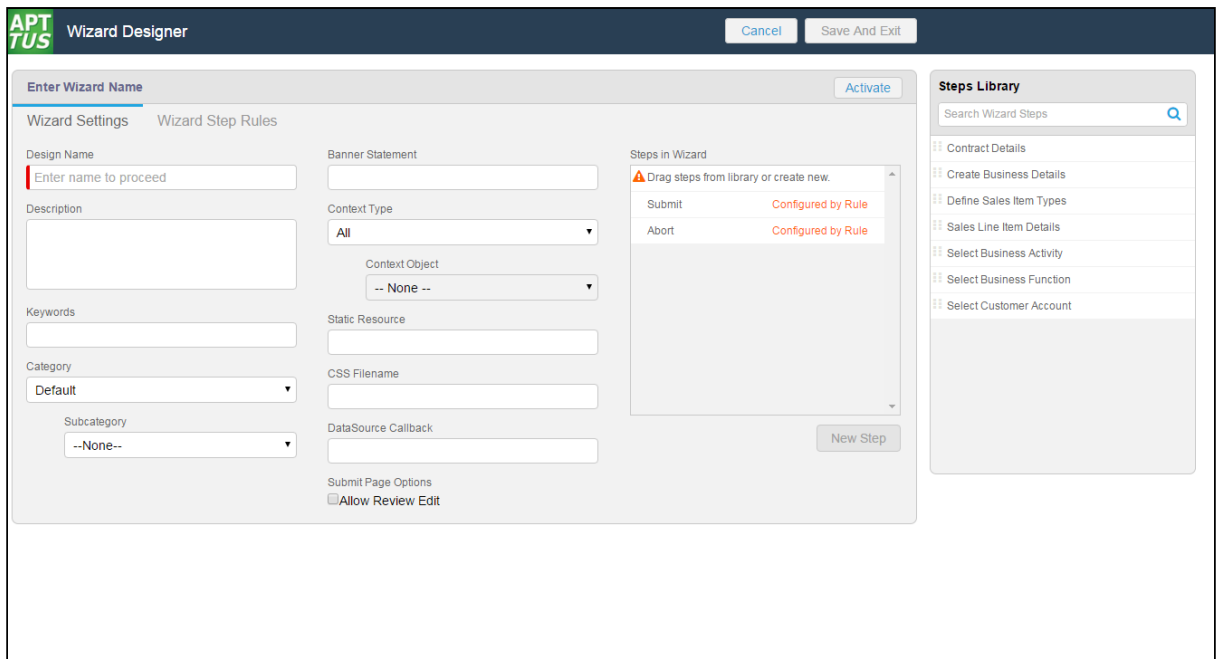
4. Enter the following search properties into the form:

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.

Setting	Description
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the **Wizard Design Name** will be used instead.
Description	Enter a description for your Wizard Design which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.")
Keywords	Enter a list of keywords which can be used to search for this Wizard Design.
Category	Choose an option from a drop-down list of pre-defined Wizard Categories (define picklist values on the Wizard Design object).
Sub Category	Choose an option from a drop-down list of pre-defined Wizard Sub Categories (define picklist values on the Wizard Design object).
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")

Setting	Description
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").
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.

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.)

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).
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")

Step Setting	Description
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.)
	Two Column Layout – Select this option to display selected inputs to the end-user in two columns.
	ⓘ The Two Column Layout is only available in the Salesforce Lightning mode. You need to configure the Two Column Layout option. For more information, see Configuring Two Column Layout.
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.
	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.

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**.
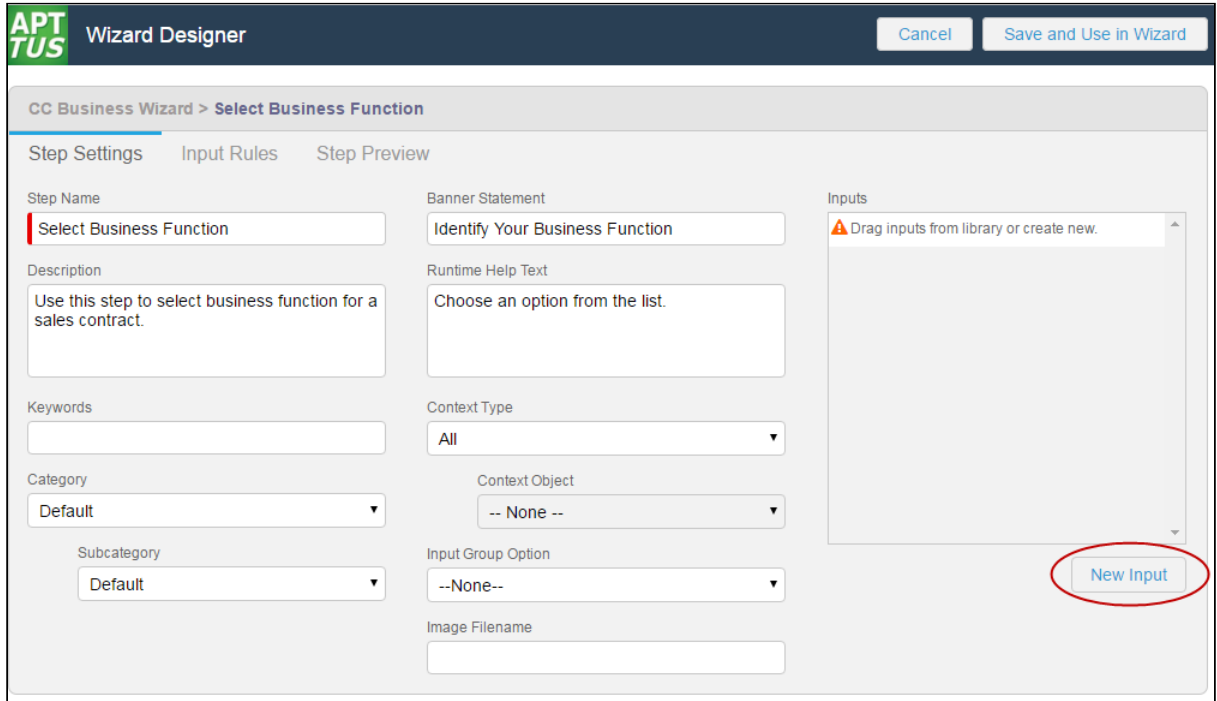
The Input Settings page is displayed.
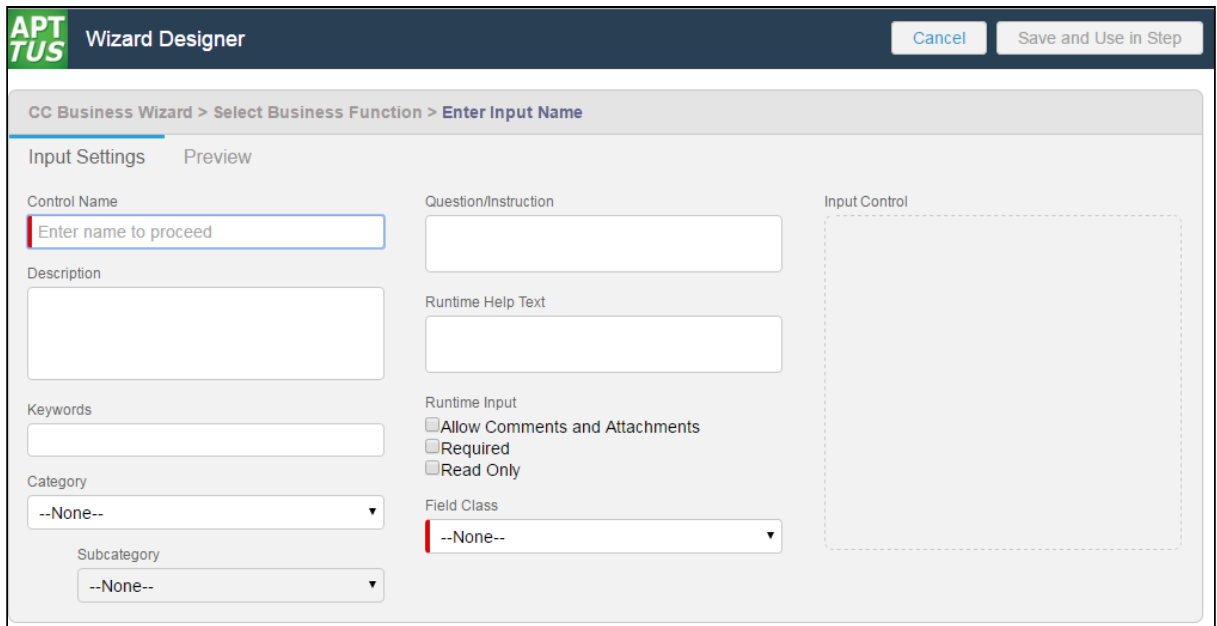
ⓘ You can mark the Add Attachment field in the Import Offline Document Object as required.

2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question/Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme."
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object).
Runtime Help Text	Enter text to display when the user hovers over the help icon next to the question/instruction.
Runtime Input	Determine how the end user can interact with this Input at wizard runtime:

Input Setting	Description
	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. **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.

Input Setting	Description

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.

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.

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.
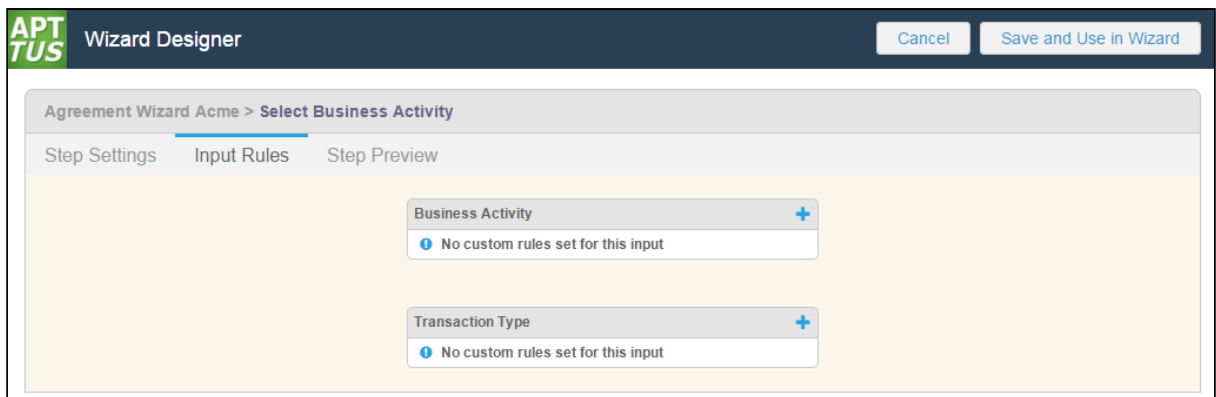
Inputs are displayed in the sequence you defined in Step Settings. Each input is displayed on the page with each input rule listed below the name of the input.

2. To create a new rule for an input, click on the ✚ icon next to an input name or hover over the list of rules and click **New**. A dialog is displayed for defining the input rule.
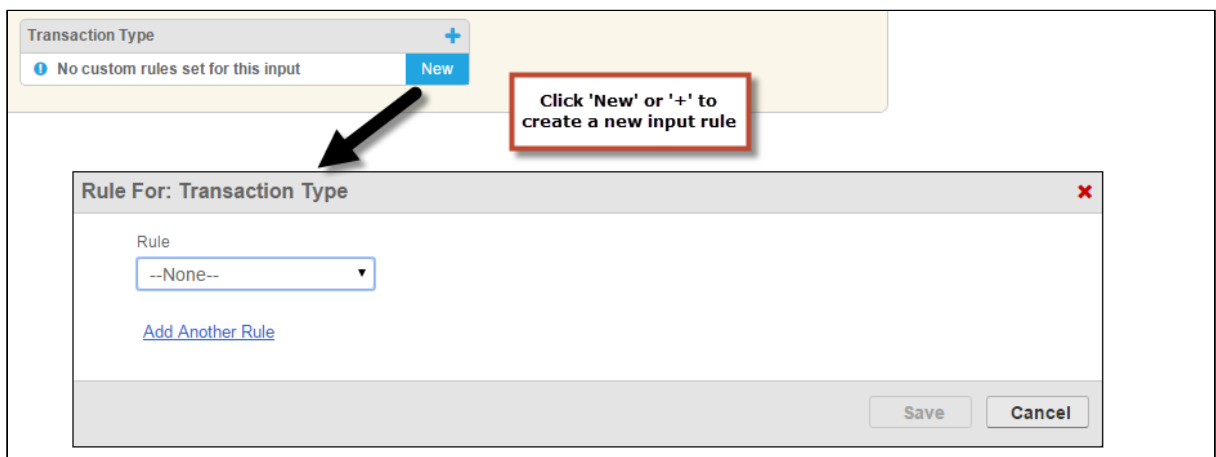
3. Choose a rule type to use from the **Rule** drop-down list.

Rule For: Determine Transaction Type ✖

Rule

-- None -- ▼

-- None --
Determine Focus Object
Determine Record Type
Enable This Control
Disable This Control
Show This Control
Hide This Control
Set This Control Value
Set Custom Value

Save Cancel

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.
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.

Rule Type	Description
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. ⓘ When you set APTS_WizardPersistHiddenValue to true and you run a wizard containing a field that has a combination of *Set this control value* and *Hide this control* input rules, the field value is set in the object you are creating. For more information, see Admin Entries.

4. To make your rule conditional, click **Add Another Rule** to add a condition to your rule type.

ⓘ 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).

> ⓘ 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.
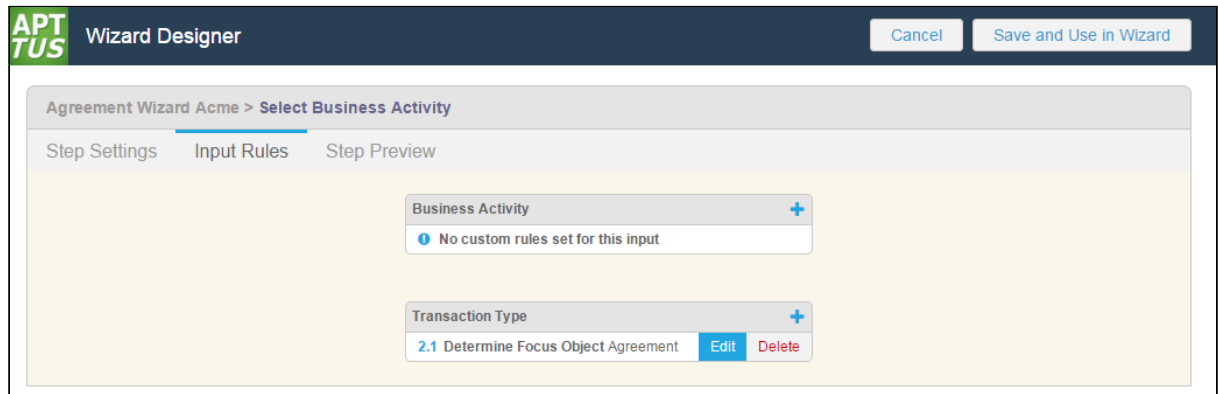
8. From the Input Rules tab you can:
   - Click the ➕ icon to create another rule for an input.
   - Click **Edit** next to an existing input rule to make changes.
   - Click **Delete** next to an existing input rule to delete the rule.
   - Click **Step Settings** to return to the step and create or add more inputs or save the step.

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:
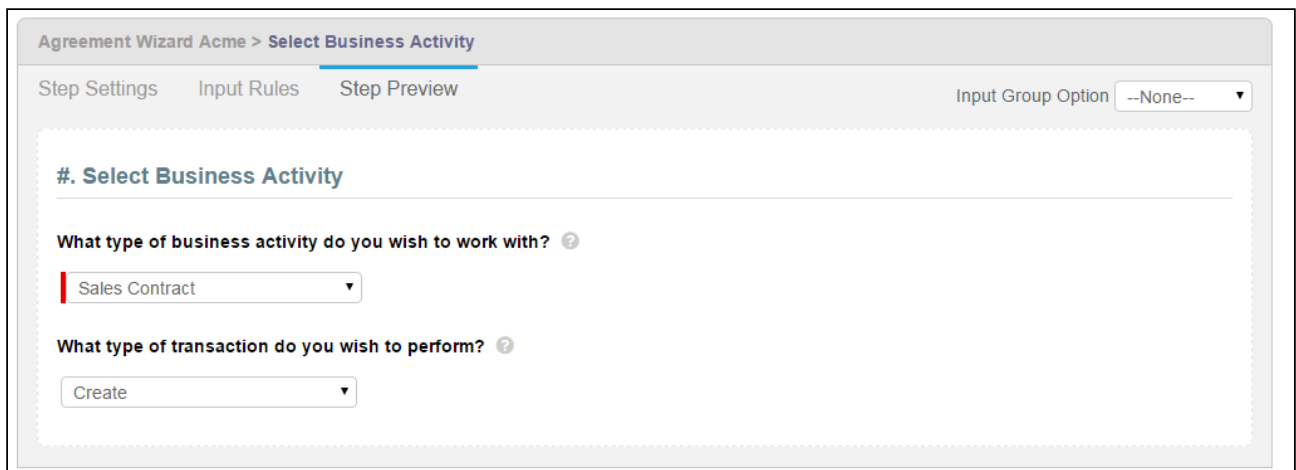
The Step Preview renders a representation of the step in the Wizard at runtime. You can interact with the preview to an extent–it does not show or demonstrate any conditional input rules you have defined. For example, if you disable a control based on another input's value and choose that value, the 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.

> ❗ 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 Two Column Layout

You need to configure the two-column layout to view the two-column layout as an option in Input Group Option in Salesforce Lightning.

To configure the Two Column Layout

1. Go to **Setup** > **Object Manager** > **Wizard Step** > **Fields & Relationships** > **Input Group Option**.
2. In the Values section, click **New**.
3. Enter **Two Column Layout**.
4. Click **Save**.

Configuring Wizard Step Rules

Wizard Step Rules control the flow of Wizard steps at runtime. You can create "Go to" rules for your steps which determine step order in the Wizard based on runtime user responses. The rules you create can be assigned as default for individual steps and can be made conditional based on expressions you create for each rule, using values from Inputs to determine whether or not rules are fired for any given step.

Much like Step Input Rules, Wizard Step Rules for any given Wizard are displayed as a graphical representation of the Wizard flow. As you add steps to your Wizard and configure Go to rules, the flow of the Wizard changes and is visually represented to give you an accurate snapshot of Wizard flow.

> ⓘ To configure Wizard Step Rules, you must have already added steps to the Wizard Design.

To configure Wizard Step Rules

1. From the Wizard Designer Settings page, click on the **Wizard Step Rules** tab.

The Wizard Step Rules tab displays a graphical representation of your current Wizard, with all steps and any current rules shown as a flow from the first step to the Submit step.
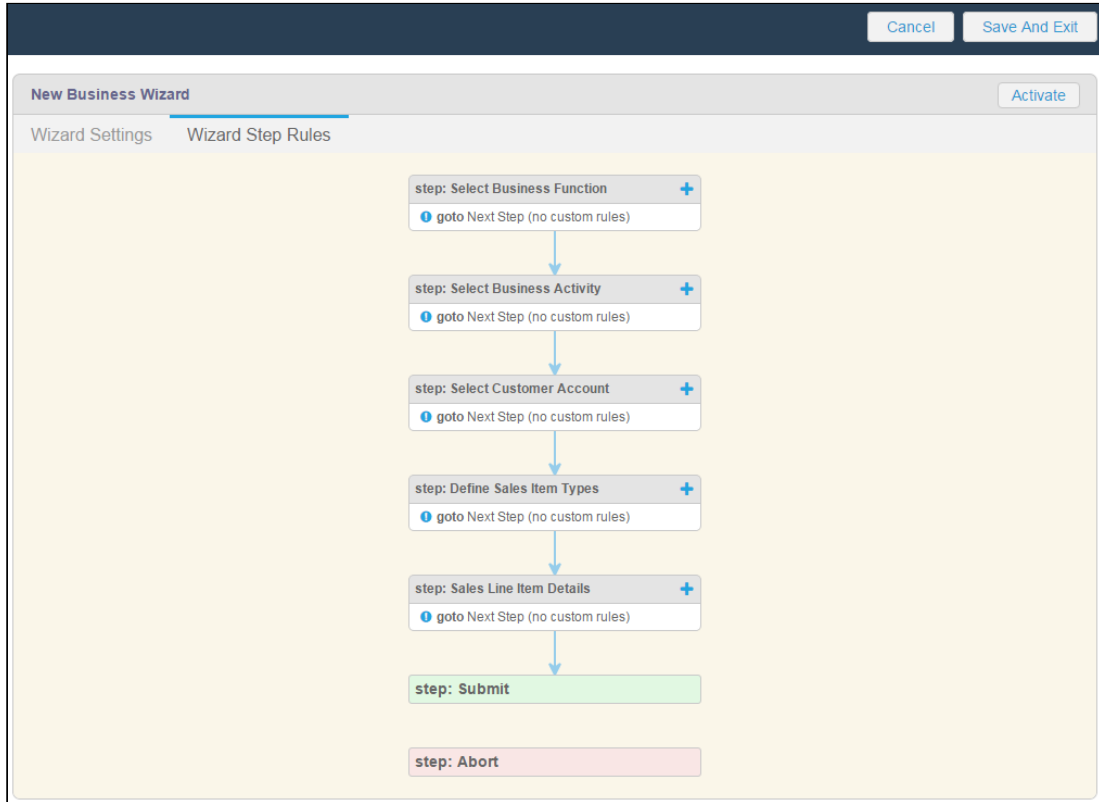
By default, steps flow in the Wizard based on their listed sequence in Wizard Settings, with the Go to rule defined as "Next Step (no custom rules)."

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.

CLM
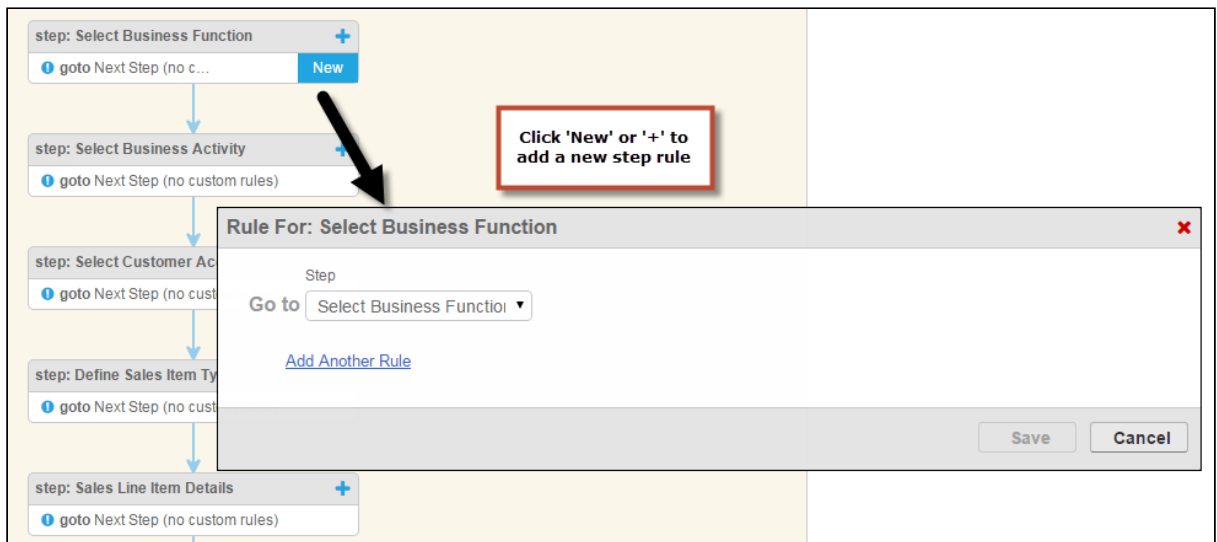
3. Choose a Go to Step rule from **Step** drop-down list.

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 Step Rule	Description

Go to Submit	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 Step Rule	Description
Go to Abort	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.

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.
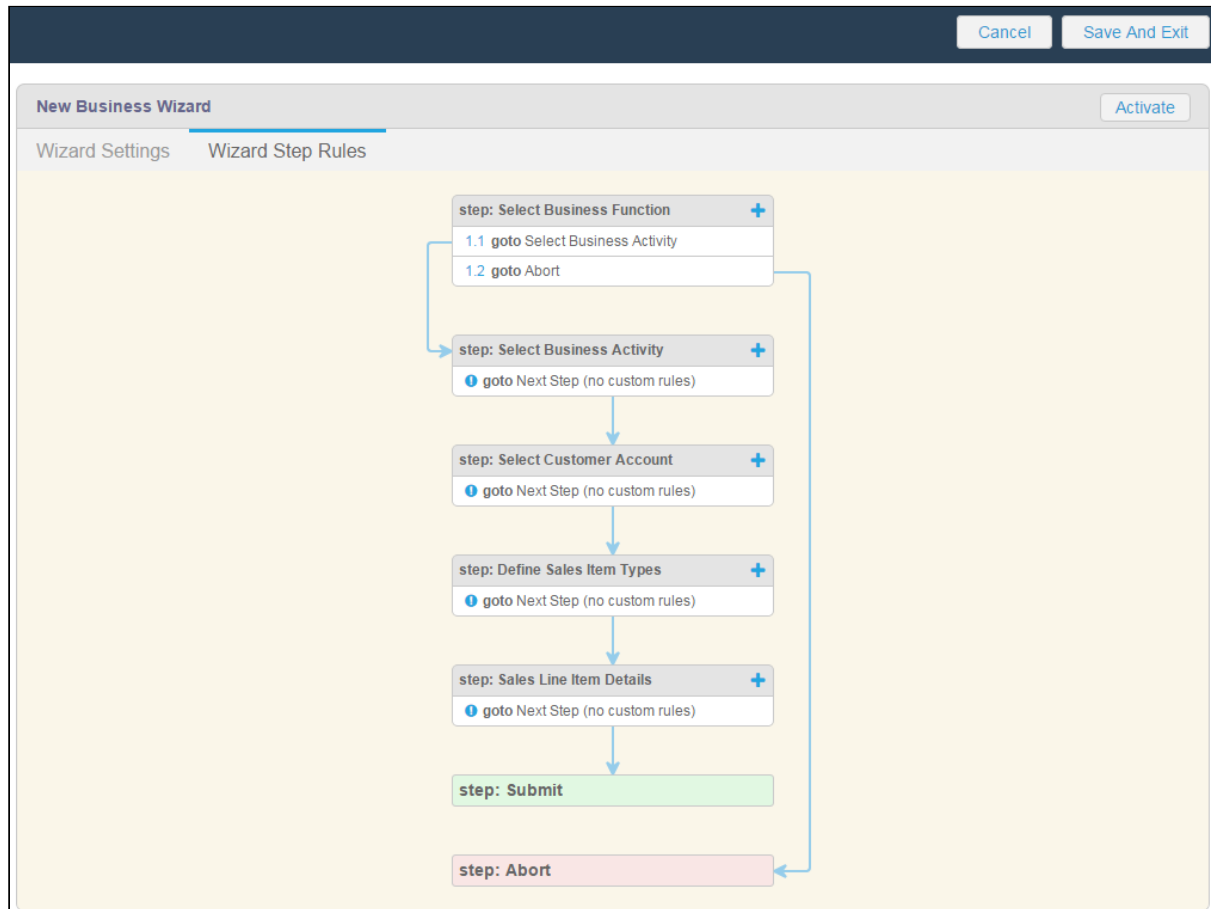
8. From the Wizard Step Rules tab you can:
    - Click the ✚ icon to create another step rule.
    - Click **Edit** next to an existing step rule to make changes.
    - Click **Delete** next to an existing step rule to delete the rule.
    - Click **Wizard Settings** to return to the Wizard.

Activating a Wizard Design

When you are finished adding Steps, Inputs and creating Step and Input rules for your Wizard (along with any other settings), you can **activate** your Wizard design to make it available to users from the Wizards tab. You can also activate a Wizard design which has been previously deactivated.

You can activate your Wizard Design from two locations within the Configurable Wizard:

- from the **Wizard Step Rules** tab.
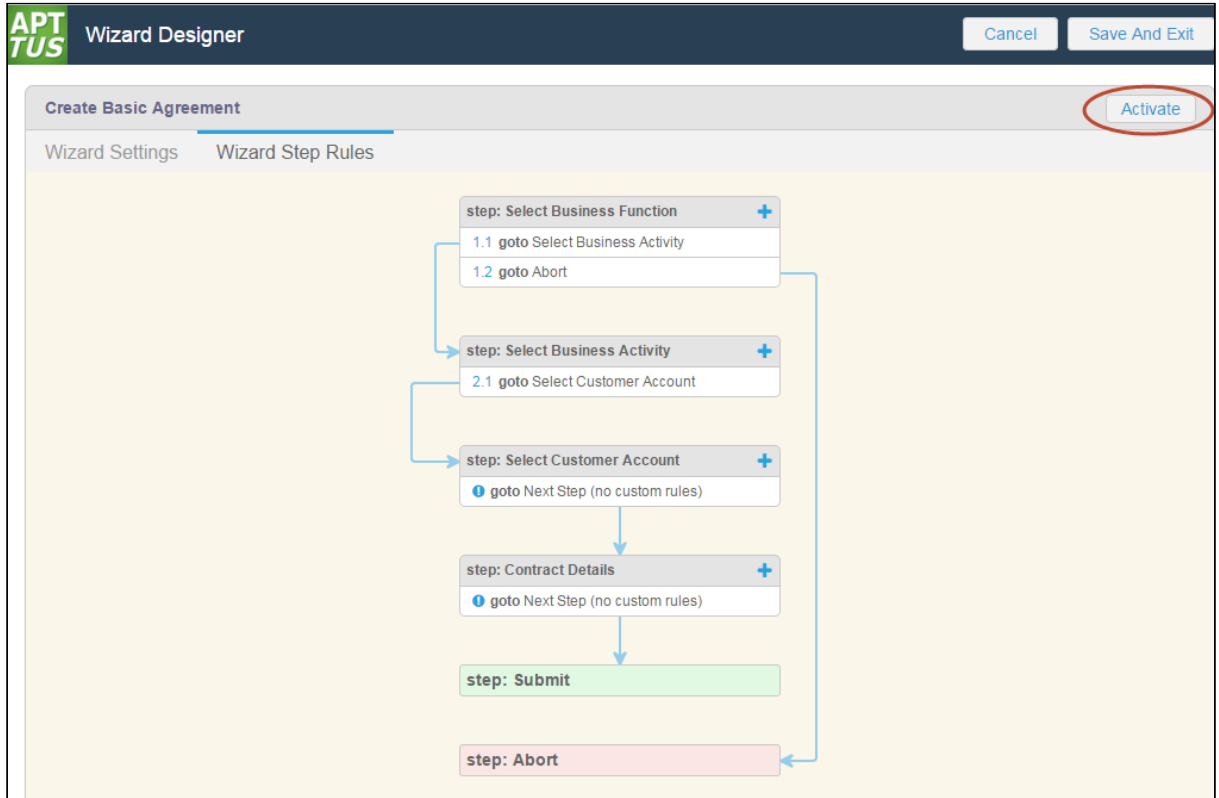
- from the **Wizard Settings** page.
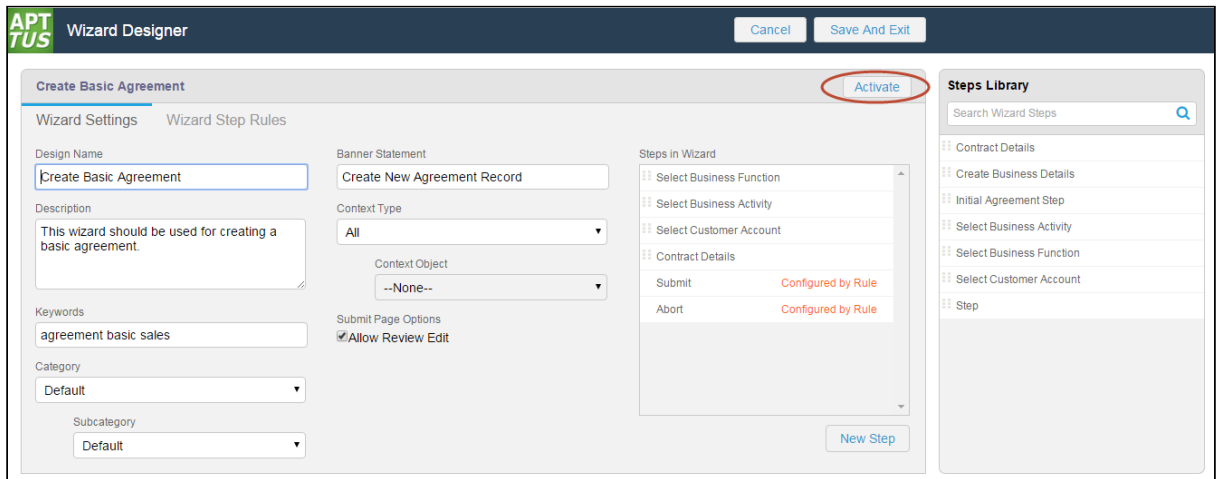
To activate a Wizard Design

1. Navigate to the Wizard Designer **Wizard Settings** page or **Wizard Step Rules** tab.
2. Click **Activate**. A pop-up dialog is displayed to confirm activation.
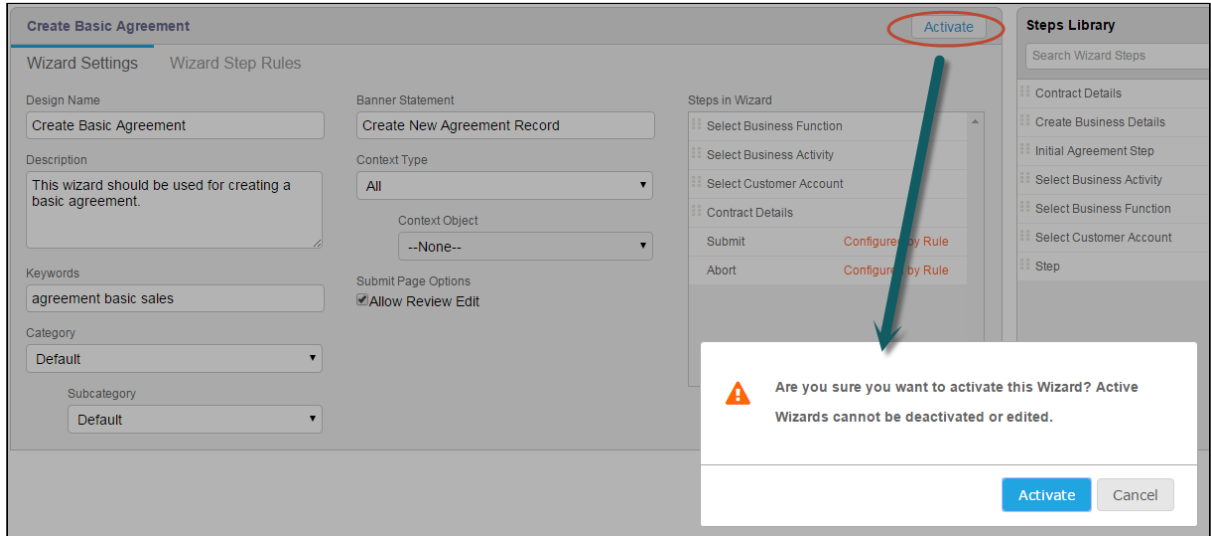
3. Click **Activate** to activate your Wizard or click **Cancel** to return to the Wizard to make more edits.

   The new Wizard is now available to be run from the Wizards tab.
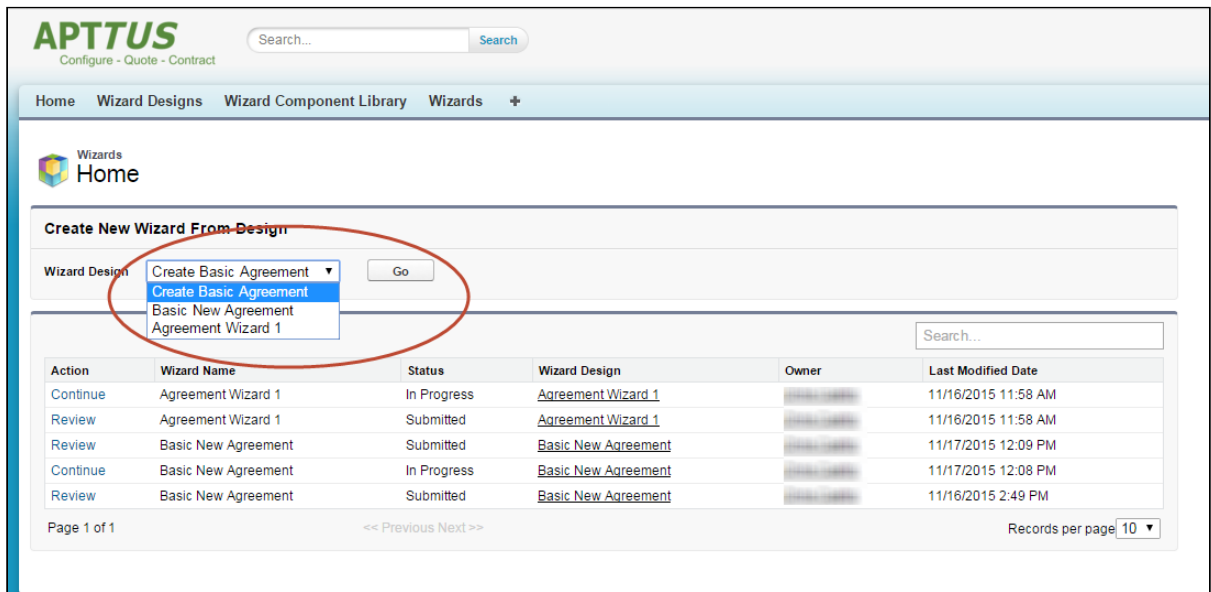
Reviewing a Wizard Design following Activation

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.

- From Wizard Step Rules you can hover over a rule to view rule details.
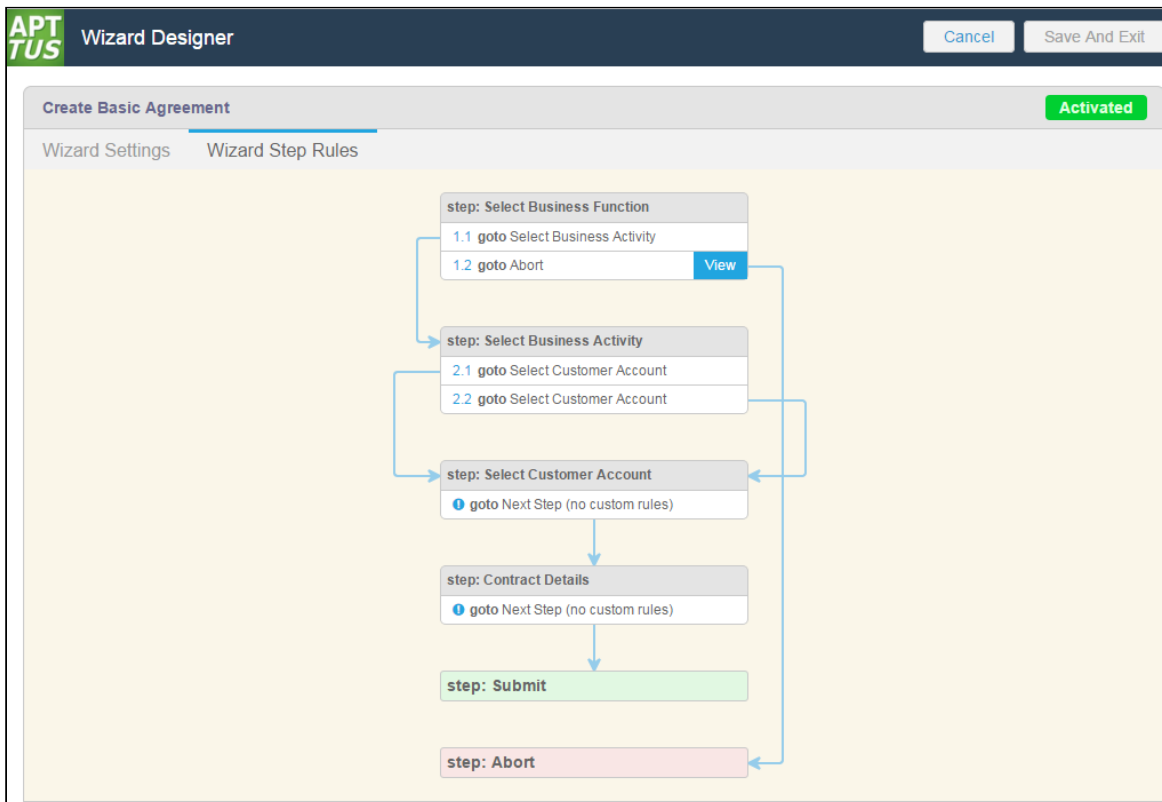
- Similarly, from Step Input rules you can hover over an input rule to view rule details.
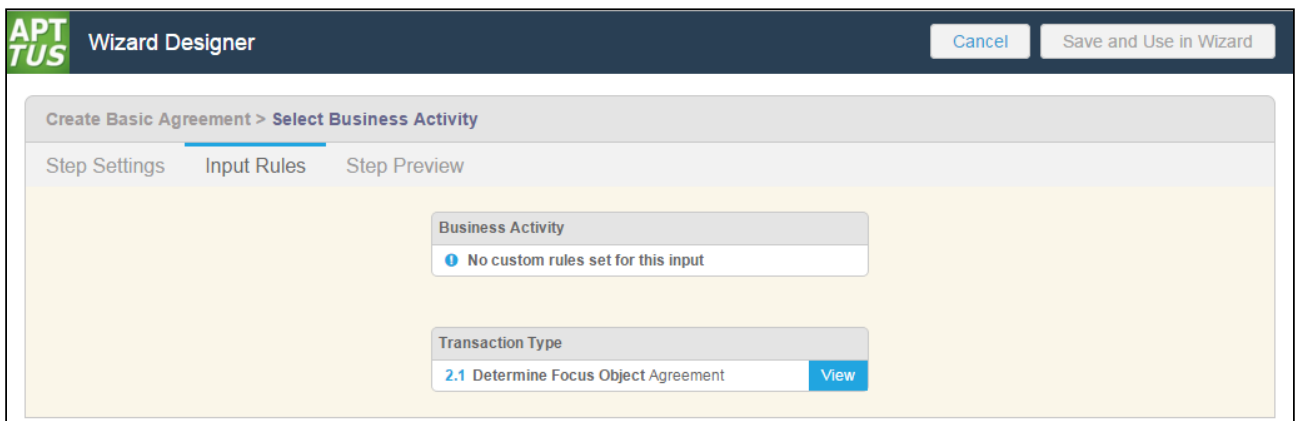
Deactivating a Wizard Design

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.
3. Click **Deactivate Wizard** on the Wizard Properties screen.
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.

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.
   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.

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.

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**.

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.

Action	Description
New Input Control	Click **New Input Control** to create a new input in the Inputs Library. See Creating Inputs for more information.
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.

ⓘ **Limitation**: When a user uses the type-ahead search feature in the Wizard Component Library, the resultant text is sometimes deleted as it is being typed.

Creating Steps

Steps are used to designate the actions that occur when end-users use the Wizard. Steps use common elements, like actions and rules, to define the flow of your Wizard. Each step represents a screen in the wizard runtime.

When you create a new step in the Wizard Component Library and save it, it becomes available for use in Wizard Designs which match the Context Type and Object specified when you define it (if any). Please note that any modifications to the step from within a Wizard Design will not affect the properties of a step saved in the library.

To create a new Step from the Wizard Component Library

1. From the Wizard Component Library, click on **New Step**.
   The Step Settings form is displayed.
2. Enter the following properties into the form:

Step Setting	Description
Step Name	Enter a name for your Step. This name can be internal but is used in the runtime banner when the user is interacting with the Wizard if **Banner Statement** (below) is not defined. Note: You cannot add any inputs to your step until you choose a Step Name.
Banner Statement	Enter a Banner Statement to display at Wizard runtime when the user is interacting with the Wizard. If left blank, the **Step Name** will be used instead.
Description	Enter a description for your step which describes its intended use (for example, "Define business details in this step.")
Keywords	Enter a list of keywords which can be used to search for this step.
Category	Choose an option from a drop-down list of pre-defined Step Categories (define picklist values on the Wizard Step object).
Sub Category	Choose an option from a drop-down list of pre-defined Step Sub Categories (define picklist values on the Wizard Step object).
Runtime Help Text	Enter text to display when the user clicks the help icon at the top of the Step page.
Context Type	Define whether your Step will apply to **All** objects or a specific **Object**.
Context Object	Choose the specific context Object for your Step. This option is only available if you specified "Object" for Context Type. (e.g., "Agreement")

Step Setting	Description
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.
   - Hover over an Input in the list and click **Delete** to remove an Input from the step.
   - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see Creating Inputs from the Wizard Designer.
6. To create rules which govern inputs for the current step, click on **Input Rules** (see Configuring Step Input Rules from the Wizard Designer).
7. Click **Save** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form. The new step is now available from the Wizard Component Library.

Creating Inputs

Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

Please note that any modifications to the input from within a Wizard Design will not affect the properties of an input saved in the library.

To create a new Input from the Wizard Component Library

1. From the Wizard Component Library, click **New Input Control**.
   The Input Settings page is displayed.
2. Enter the following properties into the form:

Input Setting	Description
Control Name	Enter a name for your Input.
Question/ Instruction	Enter a question or instruction which the end user will see in the runtime wizard.
Description	Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme."
Keywords	Enter a list of keywords which can be used to search for this Input.
Category	Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object).
Sub Category	Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object).

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
	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

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).
2. Choose a Wizard to run from the drop-down list of designs and click **Go**. Note: Wizards associated with deactivated or retired Wizard designs will not be available in this list.

   > ⓘ Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design. The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.
4. Move through the steps of the Wizard, choosing values for the fields in each step. Click Next when you are finished with a step to move to the next step. Click Back to return to the previous step. Click Save to save the data on the current wizard page.

   > ⚠ 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 business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.

5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), and/or click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:
   a. Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.
   b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.
   c. Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.

6. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses, for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract.
7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see Working with the Wizards Tab).
8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.
9. Click **Edit** to change your answers for any steps in the Wizard. A dialog is displayed warning that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.
10. Click **OK** to edit the step or **Cancel** to return to the Review page.
11. When you are satisfied with your responses, click **Submit.**
    Depending on the design of the Wizard, one or more of the following will occur:
    • A record of the type determined by your inputs within the Wizard will be created (e.g., a Sales Agreement record).
    • You will be redirected to the record details page of the record just created by the Wizard.

- You will be redirected to another page in Salesforce.
- You will remain on the Review page and the Wizard will be shown as **Submitted** (in this case data from the Wizard has usually been submitted for purposes other than creating a record).

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.

To continue an In Progress Wizard

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

1. Navigate to the Wizard using the type-ahead feature or page navigation.
2. Click **Continue** under the Action column. The Wizard opens in a new tab at the current step.

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

Notes & Attachments			New Note	Attach File	View All
Action	**Type**	**Title**	**Last Modified**
Edit | Del	Note	A - Business Wizard 1 Notes	11/24/2015 2:44 PM

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

Note
A - Business Wizard 1 Notes

Note Detail   Edit   Delete

Note Owner	
Related To	a01A000000NfV53
Private	
Title	A - Business Wizard 1 Notes
Body	This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU
Created By	11/24/2015 2:44 PM

Edit   Delete

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

ⓘ The Notes & Attachments Related List must be added to the record layout to view the Wizard notes.

Using the Preview Sidebar

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

- Preview a future step in the Wizard.
- Track overall completion progress.

- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

To use the Preview Sidebar

1. Launch a new Wizard from the **Wizards** tab. The runtime Wizard is displayed with the Preview Sidebar in collapsed view.
2. Click on the sidebar to expand it. You will see one of two possible views:
   - If you are running a linear, step-by-step Wizard with no conditionally-shown steps, you will be able to see and navigate to any step in the Wizard.

   - 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.

ⓘ 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.

4. Click on **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.

5. Click **Back** to return to the last step you worked with.

Example: Configuring a Sales Contract Wizard

The following section describes an example process for an Agreement record-creation Wizard. This Wizard will 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.

> (i) 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**.

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."
- **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.
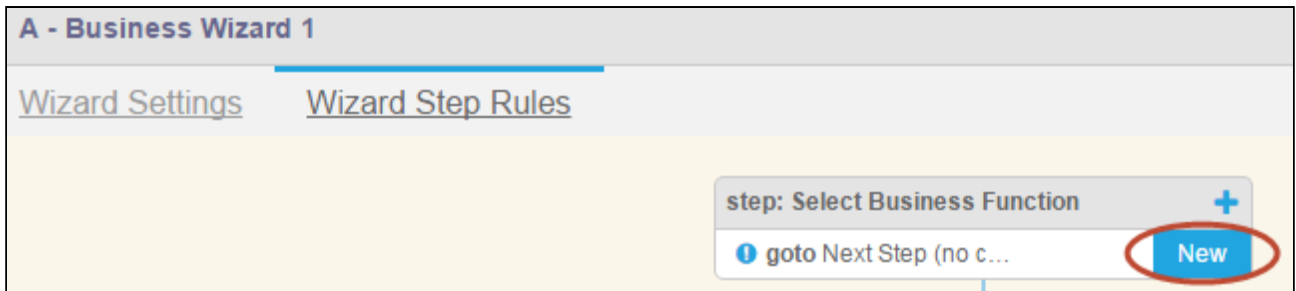
Rule #1: Go to Next Step
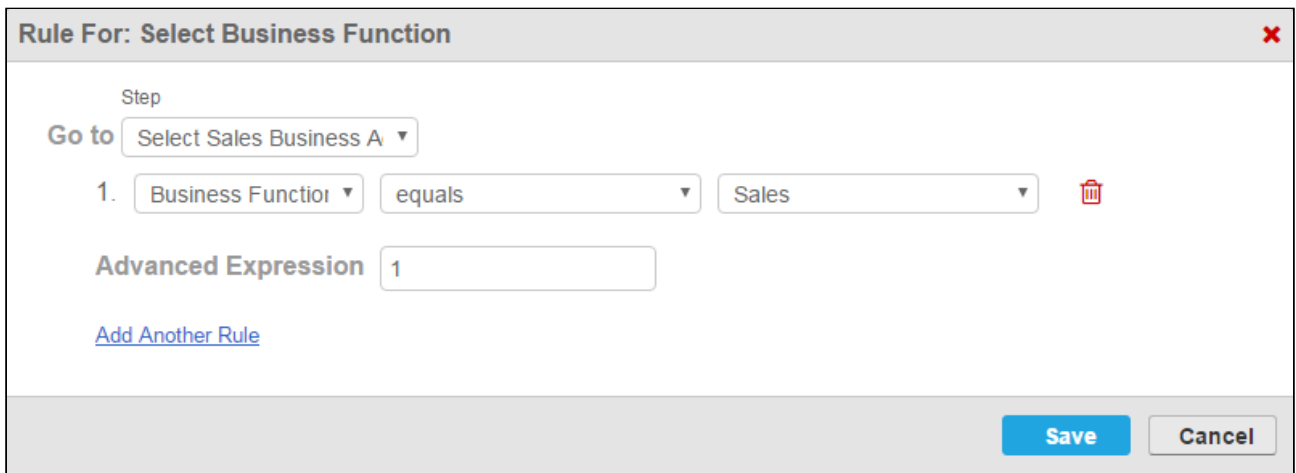
A Go to Step rule is defined to **Go to Select Business Activity** when a user chooses **Sales** from the **Business Function** input (see above).

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.
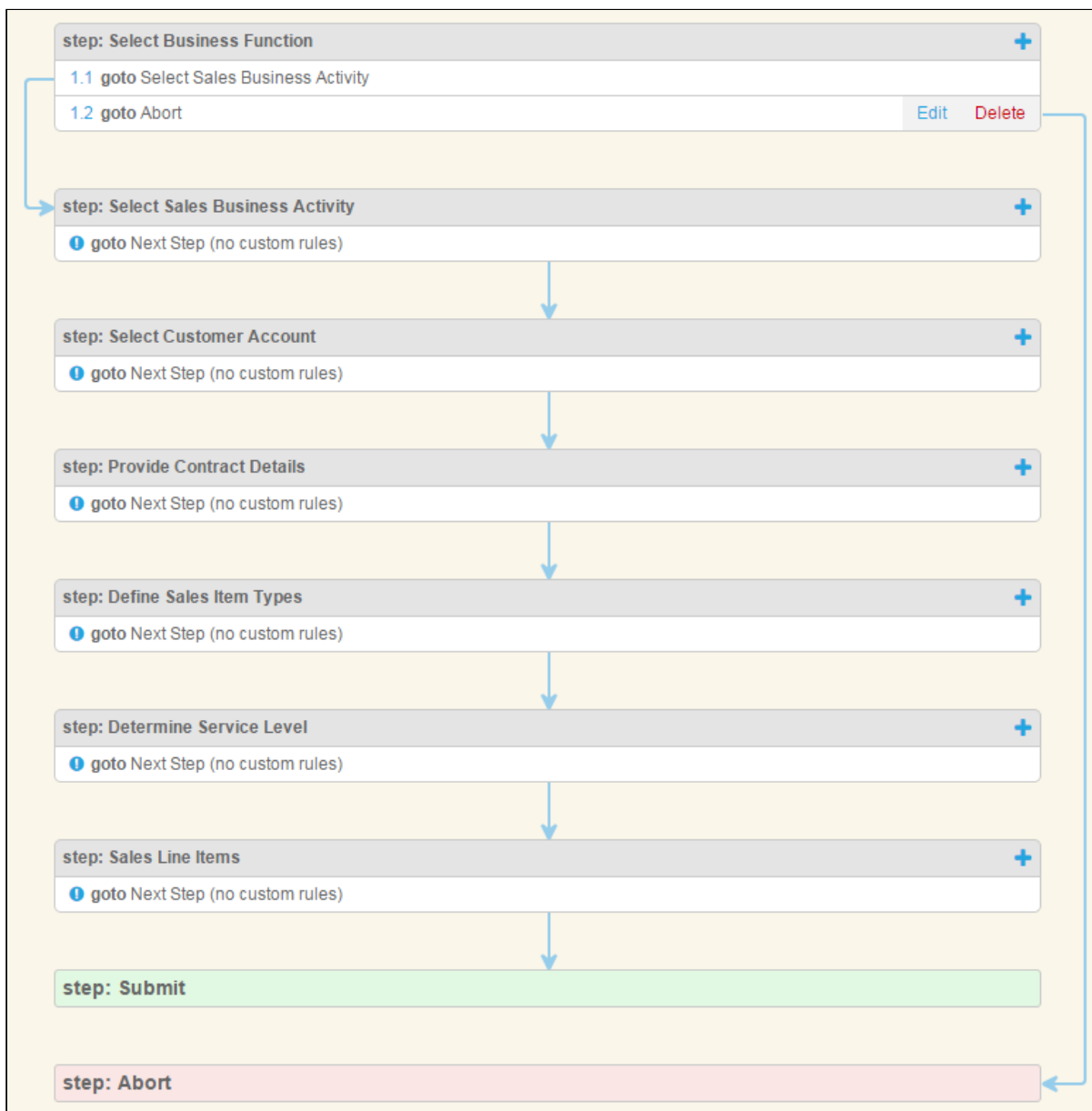
How it looks in the Wizard

When a user runs the Wizard, the step prompts the user to choose which business function they want to work in.

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.

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**.
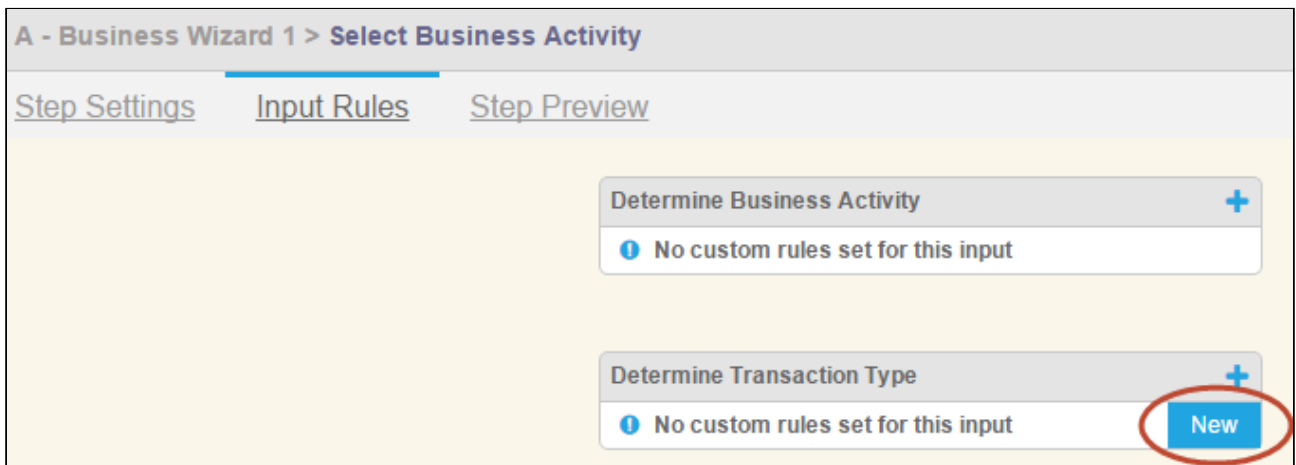
Rule: Determine Focus Object

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.

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.

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**.

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**.
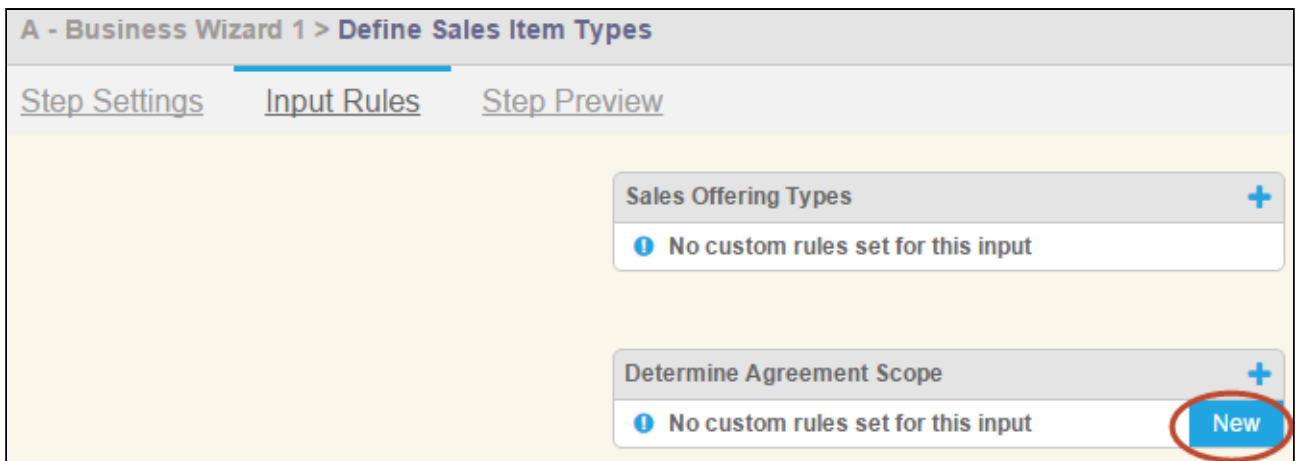
Rule: Determine Record Type

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.

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to each question.

When the user chooses the proper responses to satisfy the input rule, the record type being specified by the Wizard is displayed at the bottom of the page.

Now that a Record Type has been determined by the Wizard, when the Wizard is submitted, an Agreement record of the type Primary Sales Contract will be created.
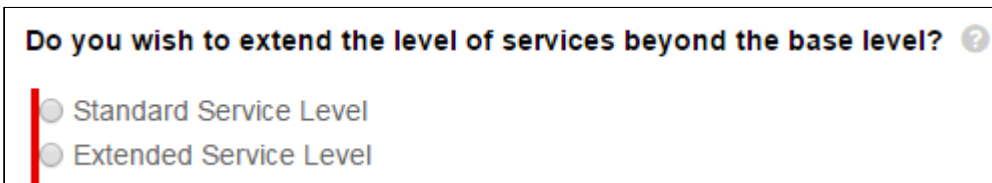
Example: Step Input Rule #3 (Modify Controls)

The following example demonstrates how you can modify the behavior and value of input controls for a step using the input rules **Hide This Control** and **Set This Control Value**. In this example, the user is defining the service level to be used in the contract. If the user chooses one option of a certain input, several inputs in the step will be hidden (Hide This Control). Similarly, depending on the combination of responses entered by the user for multiple inputs, the final value of one input will change (Set This Control Value).

Create Input Rules: Hide This Control

In this example, several input rules are defined for the **Determine Service Level** step.

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.

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.

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**.

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.

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.
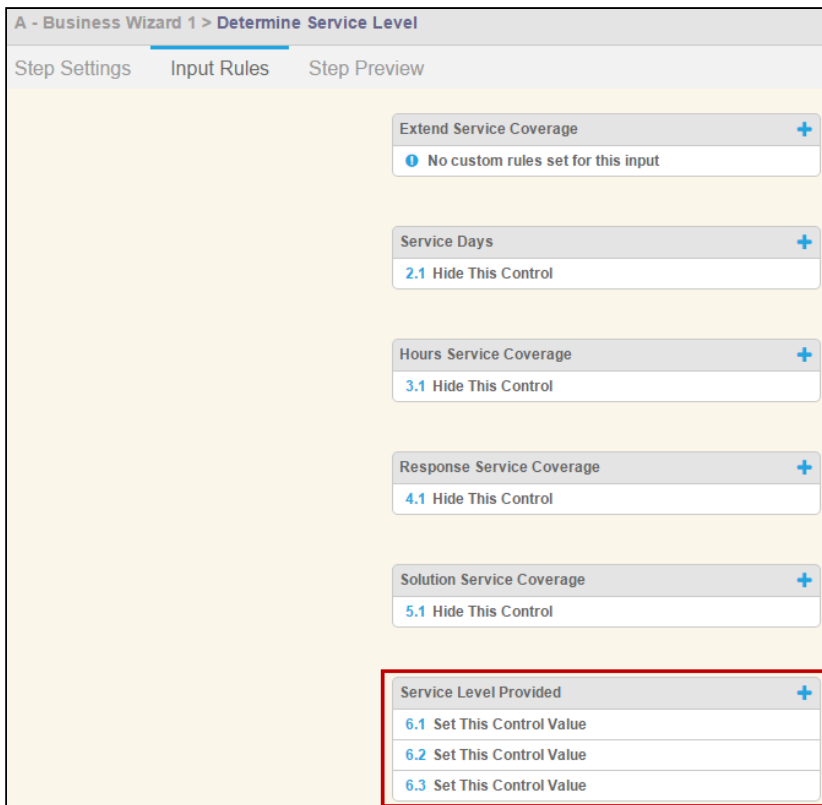
It is recommended that when you create a rule which will set the value of an input in a step, the input being set should be set to Read Only (when it is originally defined). Alternatively, you can create a **Disable This Control** rule and set criteria which will change the input to read only during 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

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.

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.

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.

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.
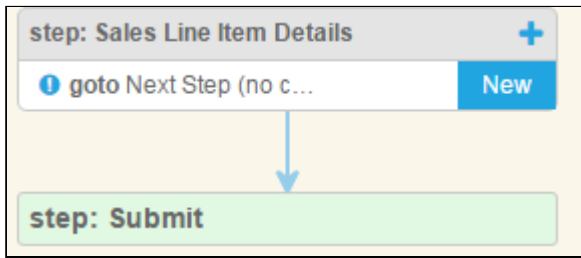
Rule: Go to Submit
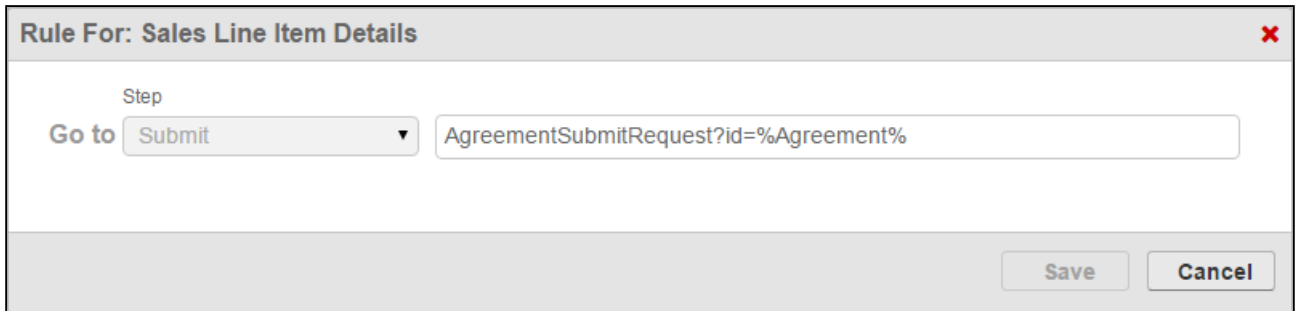
The **Go to Submit rule** is defined with a specific *relative* URL: "AgreementSubmitRequest?id=%Agreement%"

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.

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.

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).
- 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.

The choice between Salesforce Sites and Communities is mainly a question of how you want users to access Wizard functionality. 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.

> ⓘ With the Spring '21 release, Salesforce has removed the View All, Modify All, edit, and delete permissions for guest users in all orgs. Hence, Conga CLM does not support guest user access. For more information, see Salesforce Documentation.

You can explore self-service options in the following sections. Click **Next** to learn how to set up a Salesforce Site to work with Wizards.

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**.
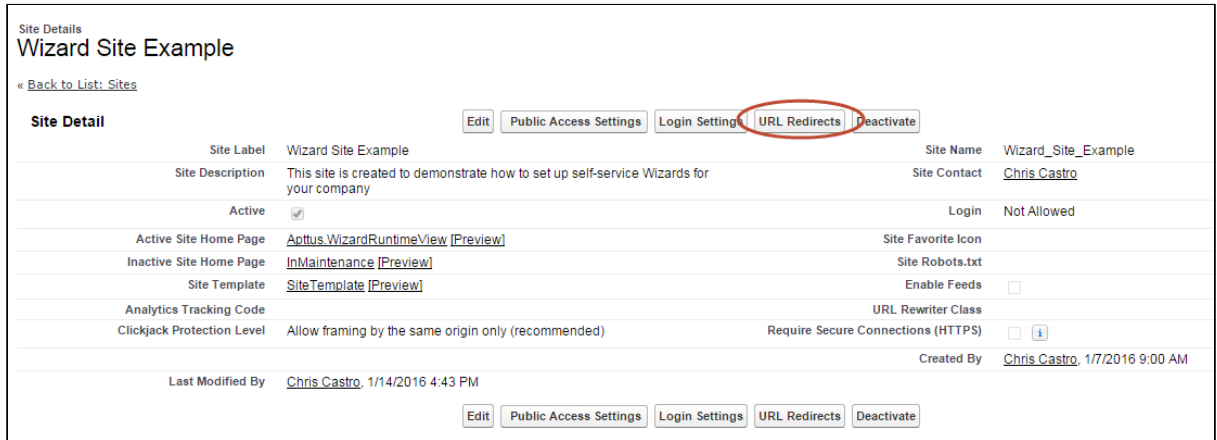
3. Enter the following to add a new redirect rule:
    - **Source URL** – This is the relative URL of the original source page. Enter "/" here.
    - **Redirect Type** – Choose "Permanent (301)."
    - **Target URL** – Enter "http://{siteurl}/apex/Apttus_wizard?wizardid={wizardid}" where {siteurl} is 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.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**
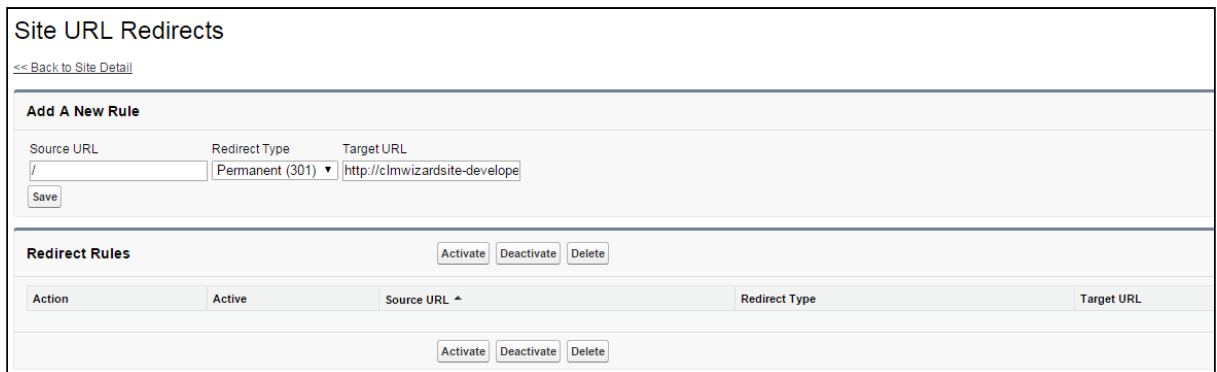
4. Click **Save.**
5. Select the rule you just created and click **Activate** to activate the URL redirect. Now when a user visits your site home page they will be redirected to begin the runtime wizard.
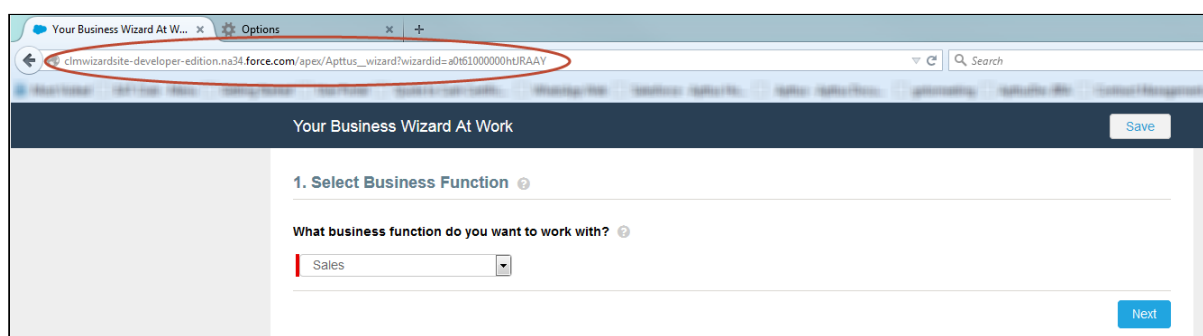
Configuring Self-Service Wizards for Communities

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.

In Spring 2013, Salesforce introduced Communities, which replaced the Customer and Partner portals. Communities combined the functionality of customer and partner portals with a way to allow customers and employees to collaborate in the same space. Using Communities to provide Self-Service Wizards, you can provide the same functionality but give your Wizard experience a completely unique look and feel. When you create a Community, you are still creating a Force.com site, but the site is wrapped in the Community, providing authentication options, branding, collaboration and other benefits. The most important consideration to use Communities over Customer/Partner portals is that Customer/Partner portals are *no longer available for new Salesforce organizations*.

For more information on Salesforce Communities, refer to Salesforce documentation on Getting Started With Communities.

> ⓘ The following pages and sections provide instructions for enabling Self-Service Wizards by creating a new community and assigning members to the Community. While you can create communities for both customers and partners, the instructions provided use customer members as an example. The process for partners is almost identical, but differs slightly. Where the process differs the documentation will provide guidance.

To properly set up Self-Service Wizards using Communities, perform the following steps:

1. Enable Communities in your org and choose a domain.
2. Create a Community for Self-Service Wizards.

3. Create/Modify User Profile(s) to be used in the Community.
   a. Add custom object permissions to Wizard-related objects.
   b. Add field-level security privileges for Wizard-related objects.
4. Create Contacts and Enable as Customer or Partner Users.
5. Add Members to the Community.
6. Add Wizard tab to the Community.
7. Activate the Community.

Creating Your Community

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

Enabing Communities

ⓘ *If Communities is already enabled for your org, skip this step.*

1. Go to **Setup > Customize > Communities > Community Settings.**
2. Select the **Enable Communities** checkbox.
3. Enter a unique **Domain Name**. This domain name will be used in all of your communities for this org.
4. Click **Check Availability** to confirm that your chosen domain is available.
5. Click **Save**.

Creating a Community for Self-Service Wizards

With Communities enabled, you can create a Community for your partners and customers to run Wizards.

1. Go to **Setup > Customize > Communities > All Communities**.
2. Click **New Community** to choose a template for your new community. The Community Builder page is displayed.
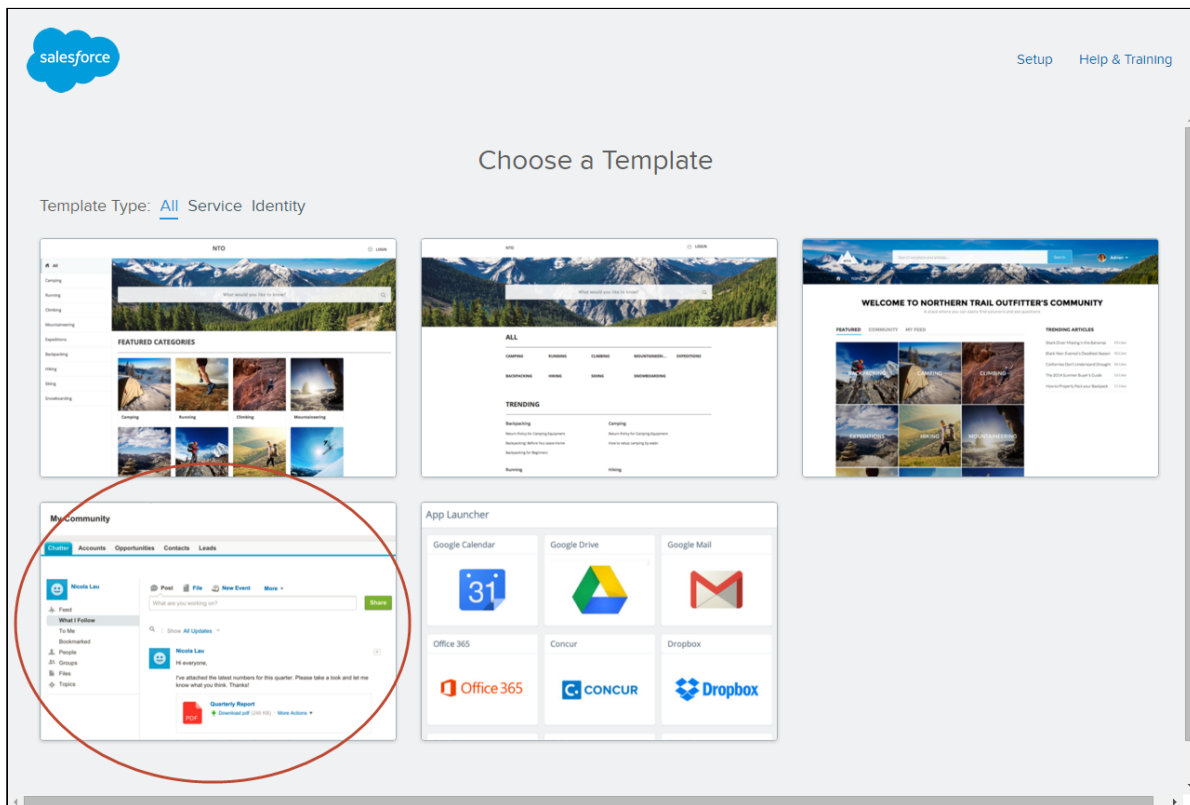
3. Choose the **Salesforce Tabs + Visualforce** template. This is required for communities which expose custom Visualforce pages (like the Contract Wizard).
4. Choose a **Name** for your Community and an optional prefix for the **URL** (in this example, "wizards" is used as a prefix).

5. Click **Create Community**. Your community has been created and is now ready to be configured for Self-Service Wizards.

Configuring Users for your Community

In order for users to have access to both your community and Wizards, you must complete the following steps:

1. Create a user profile for your community OR modify an existing user profile
2. Add custom object permissions to the profile(s) for Wizard-related objects
3. Add field-level security permissions to the profile(s) for Wizard-related objects
4. Create customer/partner users as contacts and enable as community users
5. Add members to your Community

> ⓘ The following sections use a Customer Community profile as an example, but you can also create a Partner Community profile. The only major differences are the type of *license* chosen when creating the profile and any users created for the profile must be associated with *partner accounts*.

Creating a User Profile

ⓘ The following section provides instructions for creating a user profile for use with your Community specifically for the use of running Wizards. If you decide you want to clone and/or modify an existing user profile for use with your Community, you can skip this step, but make sure the user profile you have chosen is assigned a Partner or Community license.

1. Go to **Setup > Manage Users > Profiles**.
2. Click **New Profile.** The Clone Profile page is displayed.
3. Choose an Existing Profile enabled for Salesforce Communities: **Customer Community User** or **Partner Community User** (Customer Community User is used in the examples on this page).
4. Enter the name for the user profile you want to create and click **Save**.

Adding Custom Object Permissions for Wizard-Related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Click **Edit** on the Profile Details page.
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*.

5. Click **Save** to return to the Profile Details page.

Adding Field-Level Security for Wizard-related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Under **Field-Level Security > Custom Field-Level Security** click the View link for the *Wizard* object.

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*.

Creating Community Users from Contacts

Assuming the customers or partners who will be using Self-Service wizards are customers of your organization, you must create or use existing contacts in your org and enable them as customer or partner users. Follow these step-by-step instructions to create a new user for your community and assign it a Community profile.

1. Create a new business contact and assign it an account or go to **Contacts** and choose an existing contact.
2. Click on **Manage External User** and choose **Enable Customer User**.
   The 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.

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.

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).

Adding Members to Your Community

Now that you have created/modified user profiles and created users to access your Community, you must add those user profiles to the Community itself to allow access. To add members to your community:

1. Go to **Setup > Customize > Communities > All Communities.**
2. Click **Manage** next to your Community.
3. Go to **Administration > Members**.
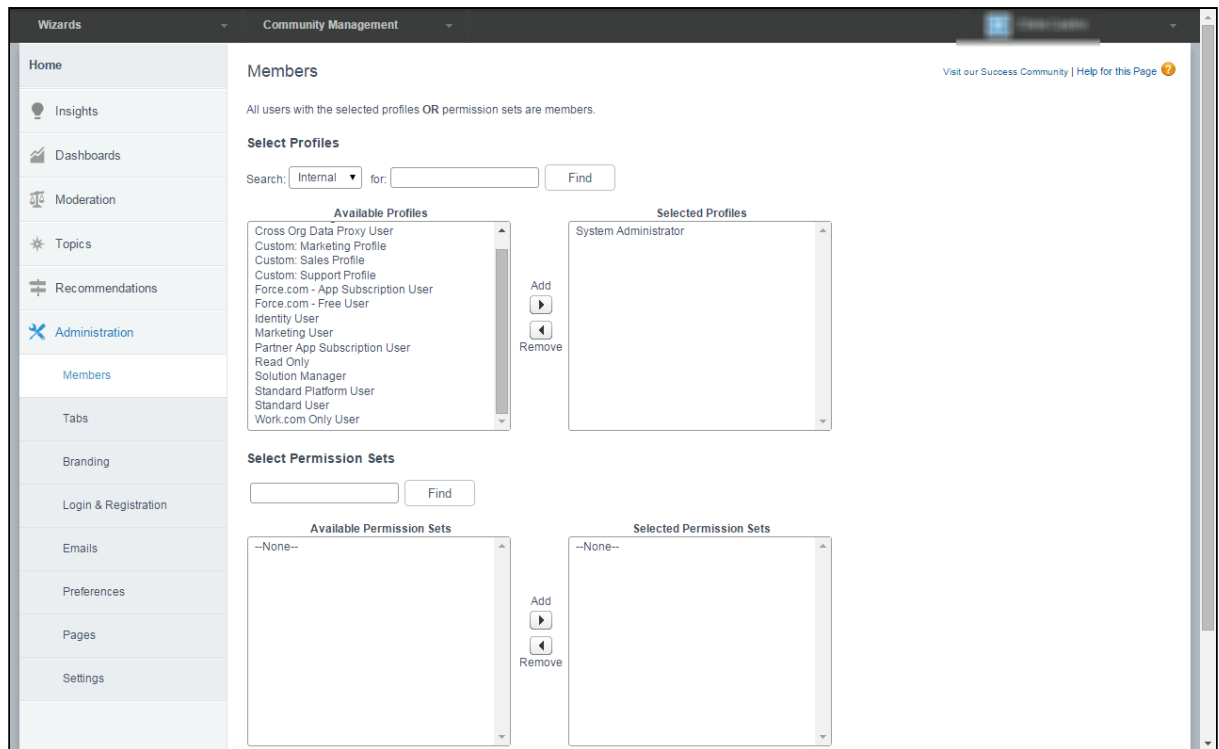
4. Search for and select the user profile(s) to add to the Community. In the example below, the user profile **Test Customer Community User** is added to the Community. All users with this profile can log in to your community with the proper credentials.
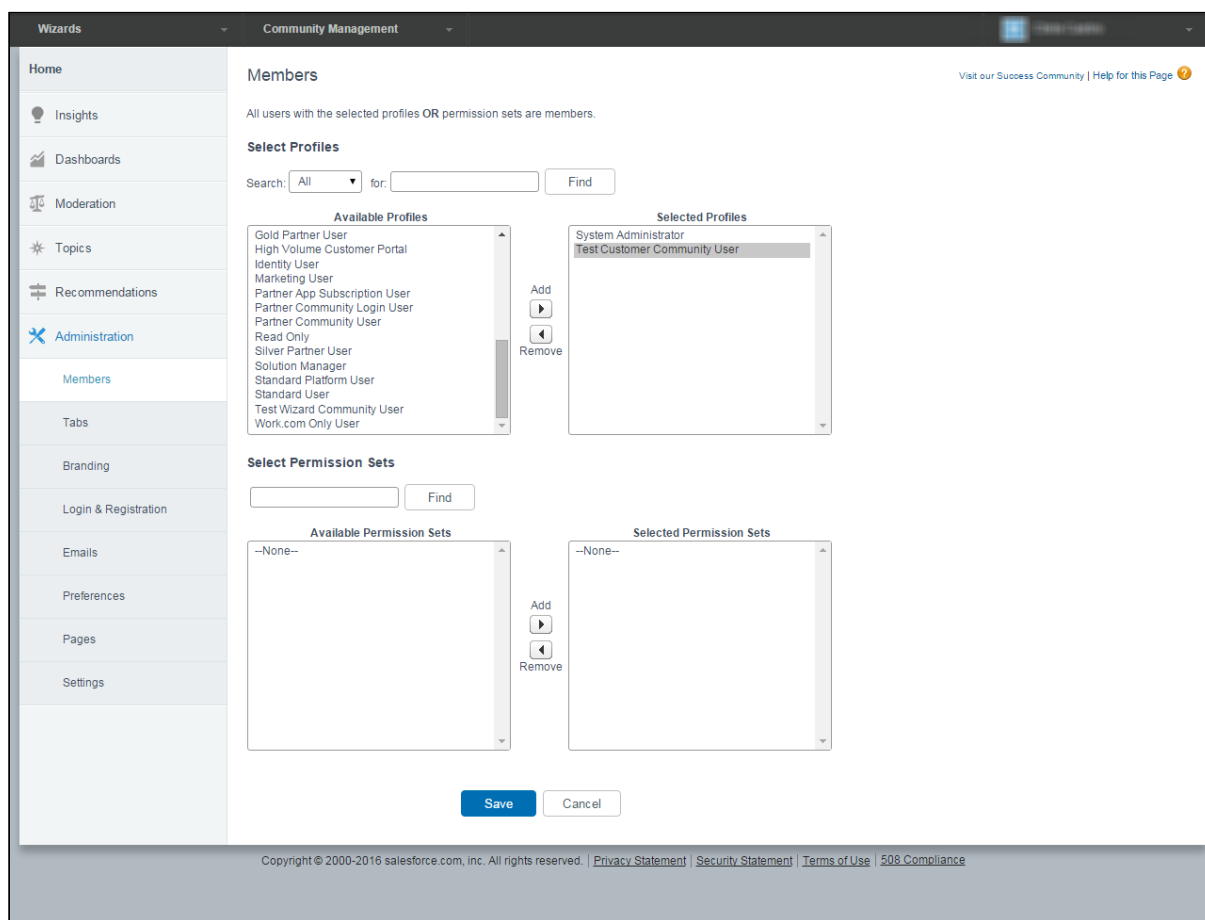
5. Click **Save.** Users with the selected profile(s) can now access your community.

Configuring and Activating your Community

> (i) Hint: Click an image on this page to enlarge the view.

To complete the process of enabling Self-Service Wizards as a Community, you need to complete Community configuration and activate the Community itself. Much of Community Management is left up to your organization–how you customize, which Dashboards and Reports you expose, how you brand your site, is all handled as part of Community Management.

Adding Tabs to Your Community

To allow users to choose from available Wizard designs and execute a runtime Wizard you must add the **Wizards** tab to your Community.

1. Go to **Setup > Customize > Communities > All Communities.**
2. Click **Manage** to manage your Community.

3. Go to **Administration > Tabs**.

4. Add the **Wizards** tab from the list of Available Tabs to Selected Tabs.
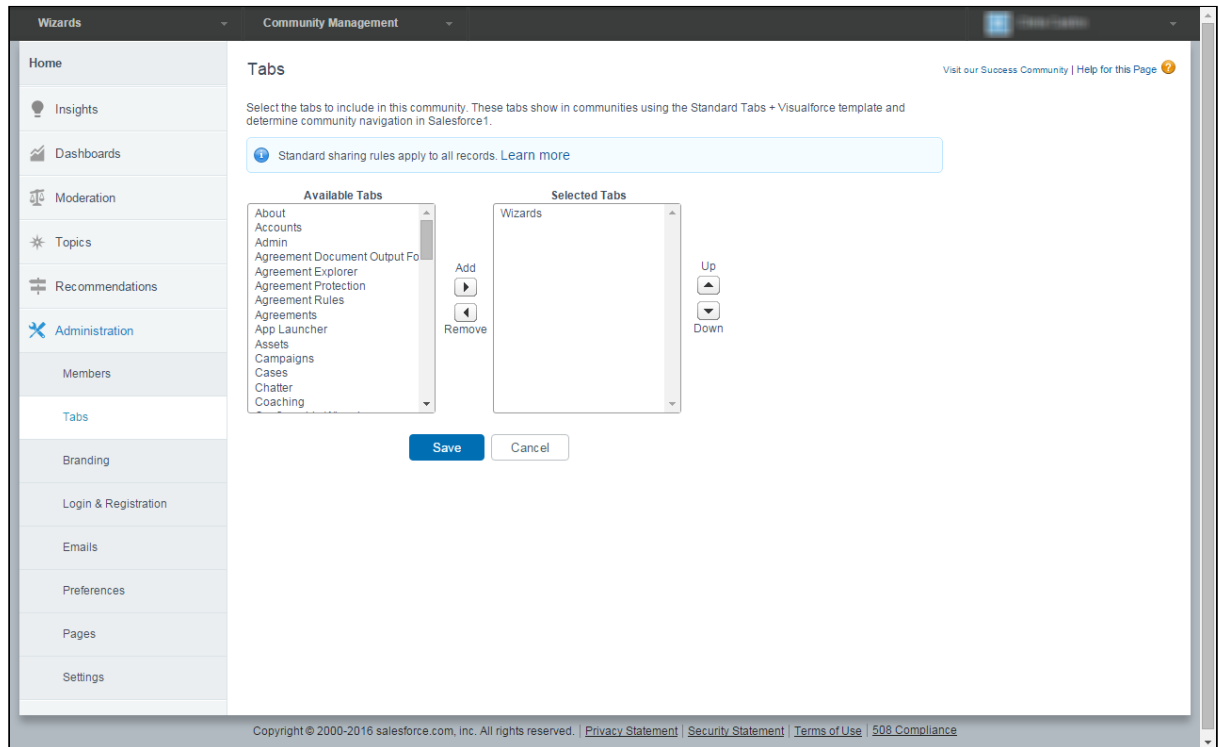
5. Click **Save**.

Branding Your Community

Although not required, you can add branding to your Community, including making changes to the following:

- Use HTML or image files to change the header and footer of your Community site.
- Change the color scheme for your Community, including the header and page background.
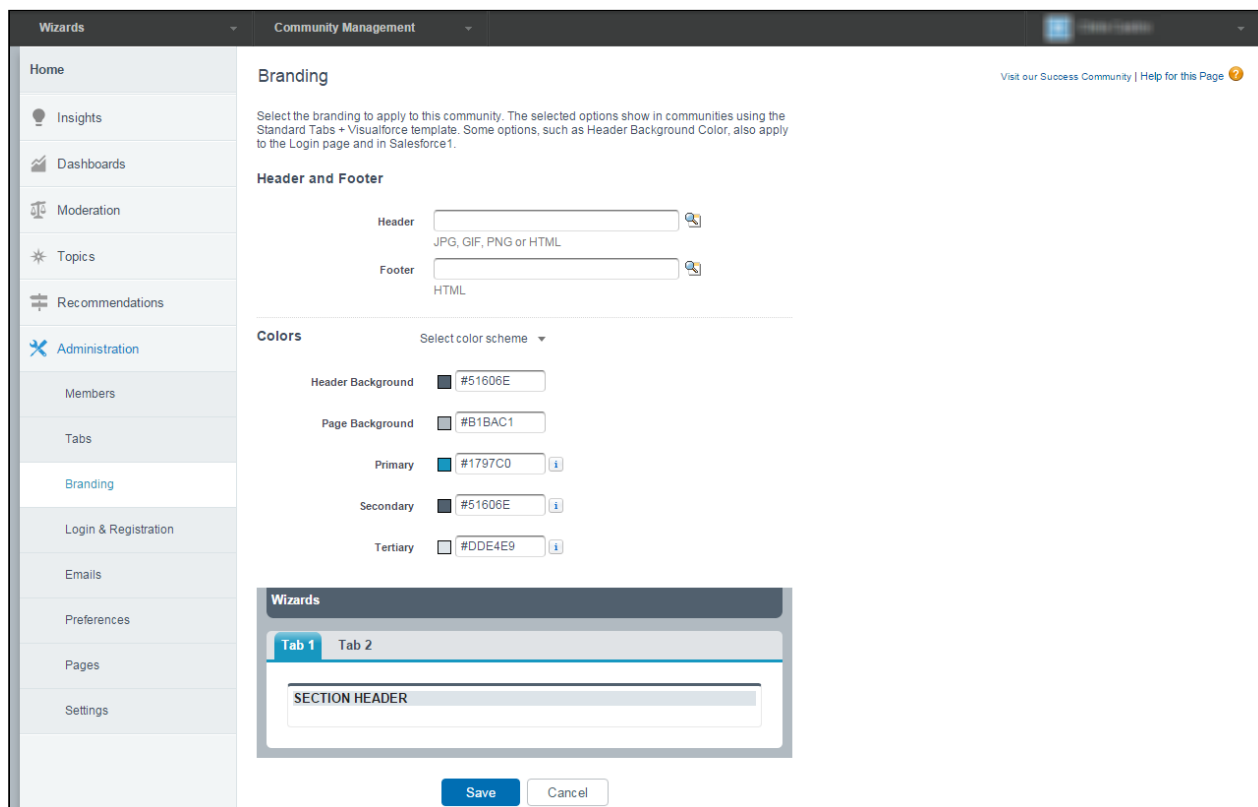
> ⓘ Note that the branding offered in Community Management differs from branding added to Wizard designs when they are created. With the Wizard Designer, you can add branding to both the Wizard banner and individual Steps of your runtime Wizards. For more information on adding branding and logos to your Wizards, refer to Creating a New Wizard Design.

Activating Your Community

When you have completed configuration and are satisfied with customizations to your Community, you can Activate the Community to make it live, allowing your users to access Self-Service Wizards.

1. Go to **Administration > Settings**.
2. Click **Activate Community** to change the status of your Community from Preview to Active.
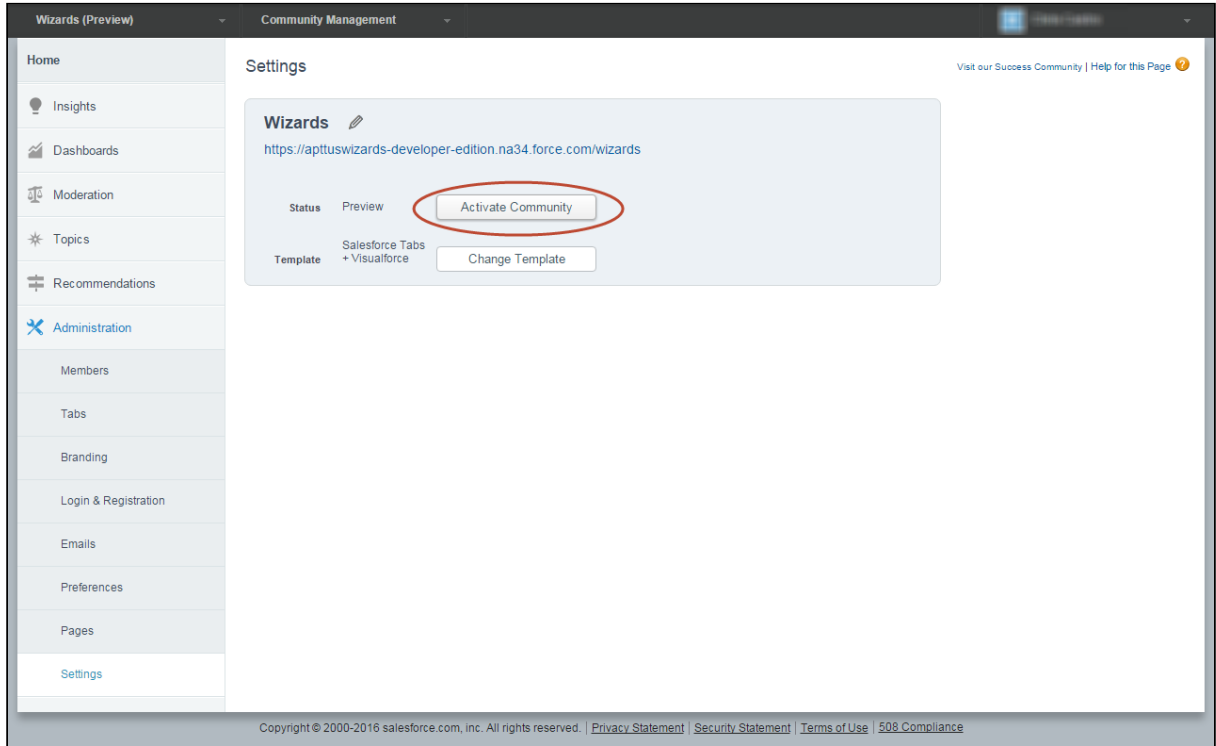
Your Self-Service Wizards Community is now ready for registered users!

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	Example Response
onwizardnext	Next	wizardDesignId, wizardDesignName, wizardId, stepDesignId, stepDesignName	{"action":"onwizardnext","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA","stepDesignId":"a2EM0000000XZSkMAO","stepDesignName":"SDProposal-1-25"}} When the next page is the Wizard "Review" page (in this case, the stepDesignID is "Null" and the stepDesignName is "Review" as this is the last page of the Wizard and not a design-defined step): {"action":"onwizardnext","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmdOIAQ","stepDesignId":"","stepDesignName":"Review"}}
onwizardback	Back	wizardDesignId, wizardDesignName, wizardId, stepDesignId, stepDesignName	{"action":"onwizardback","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA","stepDesignId":"a2EM0000000XZSkMAO","stepDesignName":"SDProposal-1-25"}}
onwizardsubmit	Submit	wizardDesignId, wizardDesignName, wizardId	{"action":"onwizardsubmit","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA"}}
onwizardabort	Abort	wizardDesignId, wizardDesignName, wizardId	{"action":"onwizardabort","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd9IAA"}}
onwizardstart	Start	wizardDesignId, wizardDesignName, wizardId	{"action":"onwizardstart","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA"}}

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.

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 <u>Field Sets</u> 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.
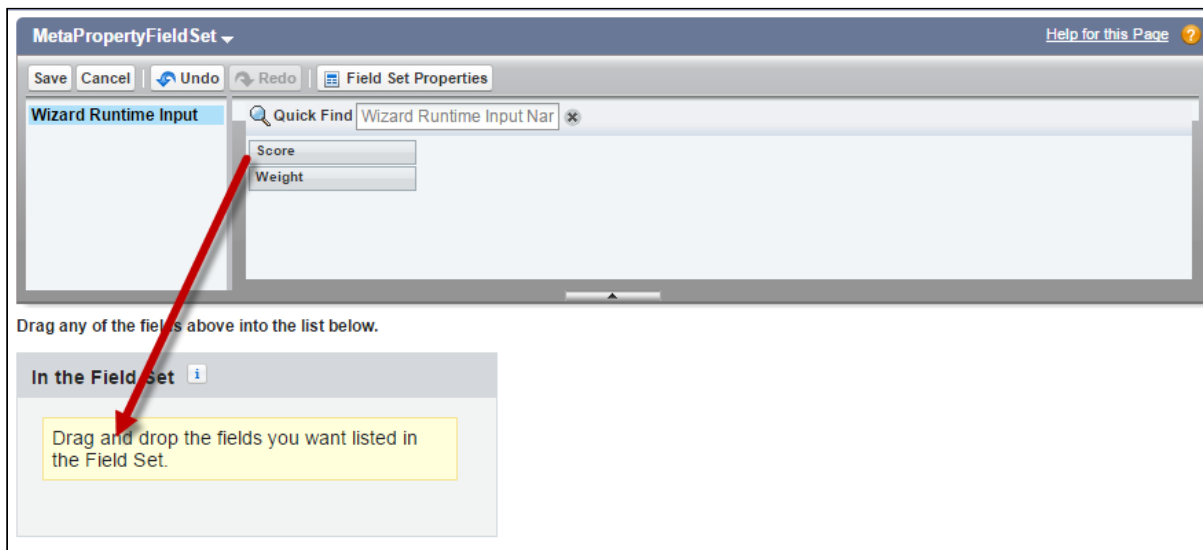
4. After adding all fields to the Field Set, click **Save** in the MetaPropertyFieldSet pane. The custom fields in the Field Set are now available to Wizard Designers as Fields on the **Set Custom Value** Wizard Step Input Rule.
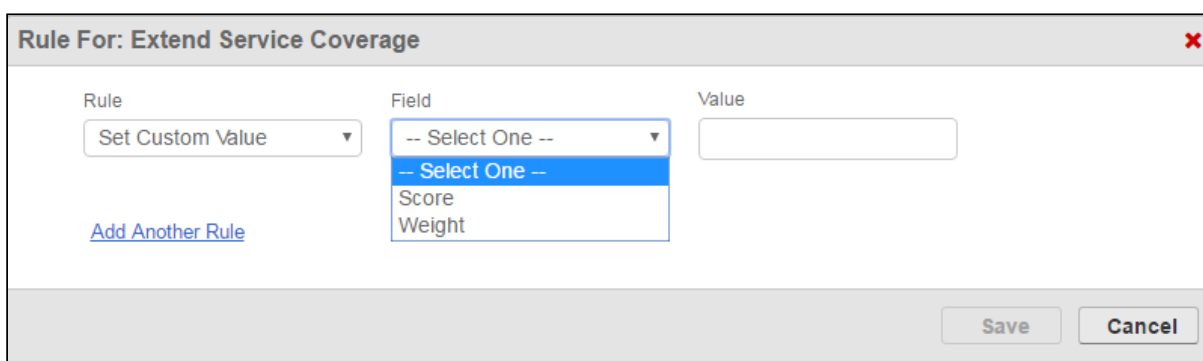
ⓘ Only one MetaPropertyFieldSet is available for all Wizard designs. Add as many meta properties as needed to the field set and use only the ones you want for specific input rules. All other fields will be ignored during wizard runtime.

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.

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 Conga CLM 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.
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",
              "FieldName": null,
              "FieldClass": null,
              "Comments": "",
              "Attachments": [],
              "Answer": "sample answer - 2"
      }],
      "Parameters": null
}
```

When using the callback method to auto-populate fields in a runtime Wizard, the method should return a string using a similar JSON structure as shown in the example above. The values in the JSON string auto-populate the fields when the Wizard is invoked.

The parameters described in the following table are relevant for Callback implementations to auto-populate questions/responses in the Wizard:

Parameter	Value	Description
Question	Object/Wizard Input field name	Provide the name of the field in the Input Control as defined (e.g., "AccountName" or "OppName")
inputControlId	Id string of Input Control	Provide the Id string of the input control to be auto-populated (e.g., "a1561000001dXHf")
Answer	Field or Response value	Provide the value to auto-populated as in the Wizard field/response (e.g. "Tier One Systems")
inputRepeatSequence	Numeric sequence for repeatable Wizard Input Controls	If the Wizard step uses a "Repeatable" layout for an input, Provide a numeric value to represent each occurrence (e.g., first occurrence is "inputRepeatSequence:" 0, next occurrence is "InputRepeatSequence:"1, etc.)

Implementing a Datasource Callback

The data captured from the previously completed wizard can be from Wizard Input Fields or Object fields. For your integration, you must create a DataSource Callback class that passes this retrieved data to the new Wizard runtime instance. The process works as follows:

- A custom Data Source callback class is created to implement the DataSource Callback interface *WizardCustomClass.IDataSourceCallback*.
- The DataSource Callback class calls a custom getData() method that takes the Wizard Design ID as the primary parameter and a map of parameters passed to the Wizard design.
- The getData() method is used to define values for specific runtime input controls in the Wizard design (questions, answers and values) and creates and returns a JSON string using the same structure interpreted by the Wizard.
- The Wizard Design using the DataSource Callback must have the class name defined in the Wizard Settings section of the Wizard Design.
- When a new Wizard is invoked, fields specified by the Callback method are auto-populated.

Use Case for Contract Wizard

This topic describes the use case for Contract Wizard.

> ⓘ **Standard Statement**
>
> This use case gives one example on how to create user-friendly on-screen Wizards, to quickly create contracts. You might use this functionality differently, depending on your business case.

A Wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record. This use case describes how a non-expert user can use on-screen Wizards, to quickly create contracts.

In this case, ACME needs to provide Sales Representative with a quick and easy way to create Non-Disclosure Agreements.

Prerequisite: Make sure you have the followings:

- Inputs are created.
- Steps are created.
- All agreements must have the following fields completed: Agreement Name, Agreement Category, Account Name, Language, Status Category, Start Date, and Primary Contact.
  To create inputs, perform the following steps:

1. Go to the **Apttus Configurable Wizard.**
2. Navigate to the **Wizard Component Library** tab.
3. Click **New Input Control**. Fill in the following fields, then **Save.**

Field	Value
Control Name	Account Name
Question/Instruction	Please select an Account
Field Class	Object Field
Object Name	Agreement
Field Name	Account

4. Click **New Input Control**. Fill in the following fields, then **Save.**

Field	Value
Control Name	Start Date
Question/Instruction	Please select an Account
Field Class	Object Field
Object Name	Agreement
Field Name	Agreement Start Date

You have successfully created all the inputs required to create the steps.

Inputs are placed in Steps. Steps can also contain rules that determine the flow and logic of the Wizard.

To create Steps, perform the following steps:

1. From the **Wizard Component Library**, click **New Step**.
2. Enter **Agreement Step 1** as the **Step Name**.
3. From the **Inputs Library**, drag and drop the following Inputs into the Inputs pane: Agreement Name, Account Name, Agreement Category.
4. Click the **Input Rules** tab at the top of the page.
5. Next, to **Agreement Name** click the **+.**
6. Select **Determine Focus Object** as the picklist value under Rule.
7. In the following picklist, select **Agreement**.
8. Click **Save.**
9. Click the **+** next to **Agreement Name.**
10. Select **Determine Record Type** as the picklist value under Rule.
11. Select **Agreement** in the following picklist.
12. Select **NDA-yourinitials** in the following picklist. Click **Save.**
    For Agreement Step 1, you should now see two Agreement Name input rules (1.1 and 1.2).
13. Click **Save**.
14. Repeat steps 1 – 3 to create Agreement Step 2.
    Use the following Inputs: Start Date, Status Category, Language, and Primary Contact.
15. Click **Save**.
    You have successfully created the two steps for the Wizard.

With the Steps created, the Wizard can now be designed. The Wizard determines the specific process, the end-user will go through, based on **Steps** and **Inputs.**

To create a Contract Wizard, perform the following steps:

1. Go to the **Wizard Designs** tab.
2. Click **New Wizard Design**.
3. Enter **Agreement-yourinitials** as the Design Name.
4. From the **Steps Library**, drag and drop Agreement Step 1 and Agreement Step 2 into the **Steps** in the **Wizard** pane.
5. Click **Activate** twice.
6. Click **Cancel** to exit Wizard Designs.

Result:

You have successfully created the Wizard.

Providing Access to Run Wizards

As an administrator, you can provide access to a particular user profile by providing required object permissions to the wizard objects. When you provide the below-mentioned permissions to a user profile, the users will be able to run wizards, but cannot create or edit wizard designs.

To provide access to run wizards

1. Navigate to **Setup** > **Users** > **Profiles**.
2. Select a profile.
3. Click **Object Settings**.
4. You need to provide the following permissions to the Wizard objects.

Object Name	Object Permissions
Wizard Component Library	Read
Wizard Designs	Read
Wizard Input Control Runtime	Create, Edit
Wizard Input Controls	Read
Wizard Input Groups	Read

Object Name	Object Permissions
Wizard Launcher	Create, Edit
Wizard Lightning Launcher	Create, Edit
Wizard Rules	Read
Wizard Ruleset Runtime	Create, Edit
Wizard Rulesets	Read
Wizard Runtime Inputs	Create, Edit
Wizard Step Runtime	Create, Edit
Wizard Steps	Read
Wizards	Create, Edit

Configuring Wizard as a Related Tab

You can configure the Wizard as a Related tab in the Account or Opportunity to launch the wizard with pre-populated record information in Lightning.

To configure the Wizard as a Related tab

1. Navigate to the Account or Opportunity Detail page.
2. Click the **Setup** icon and select the **Edit Page** option.
   This displays the Account or Opportunity Object page per your selection in the first step.
3. In the layout, click the **Details** tab.
   This displays a tabs component in the right panel.
4. Click the **Add Tab** button.
   This adds another Details tab in the layout.
5. In the tabs component, select the newly added Details tab.
6. From the Tab Label, select **Custom**.
   This displays the Custom Label text field.
7. In the Custom Label field, enter **Wizard**.

8. In the layout click the **Wizard** tab.
9. In the left panel, search for Wizard Create action.
10. Drag Wizard Create action from the left panel and drop in the Add Component(s) here section.
11. Navigate to the wizard that you need to use to create agreements and copy the Wizard Design Id.
12. Click the Wizard tab and select the Create Wizard button.
13. In the right panel, enter the Wizard Design Id.

14. Click **Save**.

   If you are configuring the page layout for the first time in your org, then you need to activate the page.

   When you navigate to the Account (or Opportunity) Detail page and click Create Wizard, the Account Name (or Opportunity Name) is pre-populated in the wizard.

Contract Lifecycle Management with Salesforce Lightning

You can use Conga CLM 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 Conga CLM tasks remain the same. You can also access Contract Management from the Lightning Console. You can use the Lightning Console to Generate, Regenerate, Activate, Amend, Renew, Submit Request, Terminate, Expire, and Clone an agreement.

Enabling the Lightning Experience in Salesforce

Enabling the Lightning Experience in your Salesforce org is a very simple process, but requires some consideration of your company's needs before you make the switch. Please refer to Salesforce's documentation on enabling the Lightning Experience. The topics on this page assume that you have already enabled Lightning in your org.

Accessing Contract Management features in Lightning

One of the main differences you will find when you switch to Lightning is how your apps are accessed, like Apttus Contract Management. In Lightning, there is no Force.com app menu, and you cannot customize the default Tabs to include Custom Objects or Visualforce tabs. Instead, you access all Contract Management features using the App Launcher.

1. Log in to Salesforce with Lightning enabled.
2. Click the **App Launcher** button in the upper left-hand corner of the Home screen.
3. From the App Launcher, click **Apttus Contract Management**.
4. Select a Contract Management feature to work with (e.g., "Agreements" to start the agreement creation process.)

Creating an Agreement

The process for creating new agreements is slightly different when you have Lightning enabled. There are two ways to create a new agreement.

1. Go to **App Launcher > Apttus Contract Management**.
2. Click **Agreements**.
3. From the Agreements List, click **New**.
   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**.

> ⚠ 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, see Drafting an Agreement.

6. Click **Edit** to make more changes to your agreement record, or the pencil icon 🖉 to make changes to any editable field. Note that all the field values you had entered on the previous page, have already been saved to the record.

7. Scroll down the page to find Agreement Actions such as **Preview, Generate,** and **Import Offline Agreement**. Any Visualforce pages you have added to the page layout, such as **Document Finder** or **Master Agreement Clauses** are also displayed on this page and should work normally.
   The agreement actions can also be accessed from the Agreement Actions panel on the right side of the Agreement Details page. The panel shows the action buttons clustered into three sections. You can change the section labels. For more information, see Enabling and Customizing Action Panel. The Agreement Life Cycle Actions group contains Submit Request, Send for Review, Send for Teams Review, Send for Signature, Activate, Cancel, Renew, Terminate, Amend, Send for Adobe Sign, Send for DocuSign, and Expire actions. The Document Actions group contains Generate, Regenerate, Import Offline Document, Preview, Merge Documents, Generate Supporting Document, Upload Signed Document, Review Offline, and Import Supporting Document actions. The additional actions group contains Agreement Hierarchy, In Effect, and custom actions. For more information on customizing action panel, see Enabling and Customizing Action Panel. The action buttons are displayed according to the agreement status and status category.

Managing Comply System Properties

1. From the Lightning Home page, click the **Setup** icon in the upper right-hand corner and select **Setup Home**.
2. From the Setup navigation menu, go to **Custom Code > Custom Settings**.
3. Click **Manage** next to Comply System Properties.

Managing Contract Management 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 the Action Panel

The Action Panel is a collection of agreement action buttons that 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.

> ⓘ The following configurations for enabling the Action Panel in your org are documented, considering 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. On the **Object Manager** page click **Agreement** object.
3. On the **Details** page, click **Lightning Record Pages** from the left-hand navigation.
4. In the **Lightning Record Pages**, click **New** and select **Record Page**.
5. Complete the steps in the new page creation wizard.
6. In the Lightning App Builder, from the left-hand navigation, drag and drop **Visualforce** component on your layout. You can reorder the components in the page layout, to your liking.
7. From the right-hand navigation pane**,** go to **Visualforce Page Name** field and select **LightningAgreementActions** from the picklist. You will now see the action panel in your layout
8. Click **Save** and then **Activate** your page, to make the record page available.

> ⚠ For more details on how to customize a Lightning Record Page, refer to Salesforce Help section Configure Lightning Experience Record Pages.

Adding Action Panel from Salesforce Classic

The Action Panel can also be added to the Agreement Record page by editing the page layout in Classic Salesforce. To do this:

1. Go to **Agreements** and select an agreement record.

2. In the Agreement Record Details page click **Edit Layout**.
3. From the Layout Designer menu, choose Visualforce Pages.
4. Drag and drop the LightningAgreementActions visualforce component on to the Agreement Layout.
5. Click **Save**.

If you now switch to the Lightning Experience, the Action Panel would be part of the Agreement Record layout.

> ⚠ It is recommended that you enable the Action Panel from the Lightning App Builder for a 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 an inconsistent user experience.

Customizing Section Labels in Action Panel

You can change the section labels.

1. Go to **Setup** > **User Interface** > **Custom Label**.
2. Click the **AdditionalActions** hyperlink.
3. Click **New Local Translations / Overrides**.
4. From the Language dropdown, select English.
5. In the Translation Text, enter the custom label name.

New Translation

Help for this Page ❓

Translation Edit	Save	Cancel

Master Label Information   ❘ = Required Information

Master Label	AdditionalActions	Master Label Language	English
Master Label Text	Additional Actions		

Translation Information

Language	English ▾ ℹ
Translation Text	Custom Actions|

Customizing Action Buttons

All the action buttons which are part of the Action Panel can be made visible and configured to suit your needs. For using your own customized buttons in the action panel, you must create custom formula fields with the required logic and add them to the

agreement layout. To create a custom formula field for action, follow the naming convention outlined:

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.
10. *(Optional)* If you do not see the configured custom buttons, you have added many custom buttons and you need to perform the following actions:
    a. Go to **Setup** > **Object Manager** > **Agreement** > **Page Layouts** > **Agreement Layout.**
    b. Click the 🔧 icon.
    c. Select the **Show scrollbars** checkbox.
    d. Click **OK.**

To learn how to create custom fields, refer to Salesforce Help Custom Fields | Salesforce.

The following table lists the actions that can be customized in the Lightning mode:

Action Name	Field Name
Generate	Generate_Custom
Regenerate	Regenerate_Custom
Preview	Preview_Custom
Generate Supporting Documents	Generate_SupportingDocument_Custom

Action Name	Field Name
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
Send for DocuSign	SendForDocusign_Custom
Send for EchoSign	SendForEchosign_Custom
Check Docusign Status	CheckDocusignStatus_Custom
Import Offline Document	ImportOfflineDocument_Custom
Import Large File	ImportLargeFile_Custom
Merge Documents	MergeDocument_Custom
Upload Signed Document	UploadSignedDocument_Custom
Review Offline Document	ReviewOfflineDocument_Custom
View Agreement Hierarchy	ViewAgreementHierarchy_Custom
In Effect View	InEffectView_Custom
Upload Reviewed Document	UploadReviewedDocument_Custom

Action Name	Field Name
Send for Conga Sign	SendForCongaSign_Custom
Office 365 Internal Review	Office365InternalReview_Custom__C
Office 365 External Review	Office365ExternalReview_Custom__C
Send for Office 365 Review	Office365Review_Custom__C
Send for Teams Review	SendToTeamReview_Custom

Thus, you can create customized links or buttons and then add them to the action panel. For information on configuring the availability of the custom buttons, see Configuring the Availability of Custom Buttons

Adding Wizard Launcher Tab in Lightning

You can configure the Wizard Launcher tab to appear on the navigation menu.

To add wizard tab

1. Click the Personalize you nav bar icon ( ).
2. Click the **Add More Items** button.
3. Select All from the Available Items panel.
4. In the search box, enter **Wizard Launcher**.
5. Click the icon.
6. Click the **Add 1 Nav Item** button.
7. Reorder according to your requirement and click **Save**.

Appendices

Use these appendices to find the following information:

- Agreement Fields
- Agreement Actions
- Agreement Status Categories and Statuses
- Admin Entries

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

Field Label	Description	Data Type	Required	Default Value	Reserved
Owner	Assigned owner of the agreement record	Lookup(User)	Yes – System assigned, changeable by user	Login User	Yes
Record Type	The agreement type for this record	Record Type	Yes	Agreement Type from selection screen	Yes
Account	The link to the account record to identify the external party to this agreement.	Lookup(Account)	Yes		Yes
Activated By	Auto-populated with the user who activates the agreement in the system. Read-only	Lookup(user)			
Activated Date	Auto-populated with the date on which the agreement was activated in the system. Read-only.	Date			
Agreement Category	Used to categorize agreement types. This can be agreement type specific (add appropriate values for each agreement type) and can also be used for template filtering.	Picklist			

Field Label	Description	Data Type	Required	Default Value	Reserved
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	The date from which the amendment is effective. If set during agreement creation, this field is auto-populated in the amended agreement.	Date			
Auto Renew	Indicates whether the agreement will auto renew	Check box			
Auto Renewal Terms	Specifies any terms associated with auto renewal	Long Text Area (32000)			

Field Label	Description	Data Type	Required	Default Value	Reserved
Business Hours	Corporate Business Hours associated with the agreement; used for cycle time reporting.	Lookup(Business Hours)			
Company Signed By	Link to contact record to identify internal signatory	Lookup(Contact)	Yes		
Company Signed Date	Date when internal signatory signed	Date	yes		
Company Signed Title	Title of person signing on behalf of Company	Text(80)			
Contract Duration (Days)	The duration from Start Date to End Date in days. Shown when agreement is 'In Effect'.	Formula(number)	yes		
Contracted Days	Days from Contract Start Date to Current Date if the contract is In Effect and Start Date is set.	Formula(number)	yes		
Description	Detailed description of this agreement	Long Text Area(32000)	yes		
Executed Copy Mailed Out Date	Date the final, executed copy was mailed out to the external party	Date			

Field Label	Description	Data Type	Required	Default Value	Reserved
Executed Date	This is a date field that is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all the recipients. A user can manually enter the date when the document has wet signatures and when the signed document is uploaded manually.	Date			
Initiation Type	To indicate whether this record is being filed as an executed agreement or is being negotiated in the system	Picklist(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		

Field Label	Description	Data Type	Required	Default Value	Reserved
Non Standard Legal Language?	To indicate whether this agreement contains non-standard language	Checkbox			
Other Party Returned Date	The date on which other party returned signed agreement	Date			
Other Party Sent Date	Auto populated with the Date on which agreement was first sent to other party for review/signatures	Date			
Other Party Signed By	Link to contact record to identify external signatory	Lookup(Contact)			
Other Party Signed By (Unlisted)	External Signatory identifier (when signatory is not maintained as contact (record) in the system).	Text Area			
Other Party Signed Date	Date when external signatory signed	Date			
Other Party Signed Title	Title of person signing on bahalf of Other Party	Text			

Field Label	Description	Data Type	Required	Default Value	Reserved
Outstanding Days	Shows the number of days between date agreement was today, if not returned as yet. Else number of days between returned and sent.	Formula(number)			
Owner Expiration Notice	To indicate the number of days prior to expiration date that a notification needs to be sent to the owner	Picklist(60-45-15-1)		90 Days	
Parent Agreement	Reference to parent agreement if current agreement was created as child or assigned manually.	Lookup(Agreement)			
Perpetual	Identifies whether the agreement has a specified end date or if it is open ended	Checkbox			
Primary Contact	Primary external contact for the agreement.	Lookup(Contact)			
Related Opportunity	Identifies the opportunity related to the agreement	Lookup (opportunity)			
Remaining Contracted Days	If the agreement is In Effect, this value is calculated as Contract Duration Days less Contracted Days.	Formula(number)			

Field Label	Description	Data Type	Required	Default Value	Reserved
Renewal Consent	Indicates whether consent is required to extend / renew this agreement	Checkbox			
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.

Field Label	Description	Data Type	Required	Default Value	Reserved
Special Terms	Identifies any special terms related to contract	Text Area			
Status	The substage of an agreement – the status underneath a given status category. These are generally modifiable by the customer except for the following values which are Conga CLM reserved to manage agreement life cycles: Request, Submitted Request, Cancelled Request, In Amendment, Being Amended, Superseded, Activated, Expired, Internal Signatures, Author Contract, Expired, Terminated, Ready for Signatures, Fully Signed, Signature Declined	Picklist			
Status Category	The higher-level state of the agreement – In Authoring, In Effect, Expired, etc. These are Conga CLM reserved values	Picklist (Request , In Authoring, In Signatures, In Filing, In Effect, Expired, Terminated, Amended, Cancelled)	Yes – System Assigned		Yes. Not changeable by user.

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

Field Label	Description	Data Type	Required	Default Value	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			

Field Label	Description	Data Type	Required	Default Value	Reserved
Generate	Link to generate agreement document using one of the templates in library. Shown only is appropriate agreement statuses. Attaches generated doc under Notes & Attachment and creates 3 tasks. Write activity history. Changes status from "Request" to "In Signatures/Ready for signatures"	Action			
Generate Supporting Document	Link to generate supporting document using one of the templates in library. Shown only is 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			

Field Label	Description	Data Type	Required	Default Value	Reserved
Regenerate	Regenerate a new agreement doc using one of the templte in the library. The new version will not have redlines (if any) from the earlier versions.	Action			
Renew	Start Renewal of an active agreement.	Action			
Return To Requestor	Return the agreement to Requestor.	Action			
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			

Agreement Actions

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

Preview

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

Generate

Action	Generate Agreement

Description	Generates the first version of an agreement document and attaches a copy of the same to the agreement record.
	When you initiate the Generate action, you are navigated to an intermediary screen to select additional information about the document to be generated. Select DOC for an MS Word document, RTF for Rich Text Format, or PDF for a PDF protected document. Additionally, if document protection has been enabled for you, you can generate a document with the appropriate protection options.
	The first draft version of the agreement is generated, rendered on the screen the in MS-Word format and attached to the system in the Notes & Attachment or Document Versions (if the document is Version Aware) related list on the agreement details page. You can:
	• Save it to the desktop, close the MS-Word application, and come back to the agreement record later.
	• Access the agreement document from the Notes & Attachments section (click on the View link corresponding to the document).
Availability	If Status Category = Request
Post Status	Sets the status for an agreement to Ready for Signatures.
Comments	In the version aware agreements, the Document Type of the generated document is updated as Agreement Document.

Regenerate

Action	Regenerate Agreement
Description	Regenerates a new version of the agreement document from a selected template based on values from the agreement record. The regenerated agreement document is attached to the Notes & Attachments or Document Versions (if the document is Version Aware) related list. Because it is regenerated from template, any red lines made in previous version are not be carried into this version and must be manually applied.

Availability	If Status Category = In Authoring or In Signatures
Post Status	N/A
Comments	In the version aware agreements, the Document Type of the regenerated document is updated as Agreement Document.

Generate Supporting Document

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

Send for Review

Action	Send for Review
Description	Allows you to select one or more attachments from the Agreement record and from related parent/child agreements, select an email template, address the same, and send it out.

Availability	If Status Category = In Signatures or In Authoring
Post Status	Sets the status for an agreement to Other Party Review.
Comments	

Send for Signatures

Action	Send for Signatures
Description	Allows user to select one or more attachments from the Agreement record and from related parent / child agreements, select an email template, address the same, and send it out as a final copy for Signatures.
Availability	If Status Category = In Signatures or In Authoring
Post Status	Sets the status for an agreement to Other Party Signatures.
Comments	

Import Offline Document

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

Comments	In the version aware agreements, the Document Type of the imported document is updated as Agreement Document.

Activate

Action	Activate
Description	• Marks the agreement as a finalized, executed agreement. • Prompts the user to select which attachment is the signed copy and records the same in activity history.
Availability	If Status Category = In Signatures
Post Status	Sets Status Category = In Effect, Status = Activated. If an Amendment or Renewal is being Activated, sets Status Category of Original Agreement to Amended or Renewed and Status to Superseded.
Comments	

Amend

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

Post Status	Sets Status of Original Agreement to Being Amended, and Status Category of New Agreement to Request and Status to In Amendment
Comments	On amending an agreement, the documents inherit Document Type from the original agreement.

Renew

Action	Renew
Description	Creates a new dot version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect
Post Status	Sets Status of Original Agreement to Being Renewed, and Status Category of New Agreement to Request and Status to In Renewal.
Comments	Agreement End Date must be in the past. On renewing an agreement, the documents inherit Document Type from the original agreement.

Expire

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

Comments	

Terminate

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

Cancel Request

Action	Cancel Request
Description	Voids an Agreement Request.
Availability	If Status Category = Request or In Authoring or In Signatures and Status <> Cancelled Request
Post Status	• Sets Status to Cancelled Request • If an Amendment is being Cancelled, sets Status Category of Original Agreement to In Effect and Status to Activated
Comments	

Agreement Status Categories and Statuses

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

Request

This Status Category indicates that the Contract is in the Request stage.

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

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

In Signatures

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

Stage	Description
Internal Signatures	Contract sent for internal signatures
Other Party Signatures	Contract sent for other party signatures
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed
Signature Declined	Signature is declined
Ready for Signatures	Contract ready for internal or other party signatures
Fully Signed	Contract fully signed and ready for activation.

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

In Effect

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

Stage	Description
Activated	Active Contract

Stage	Description
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

Expired

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

Stage	Description
Expired	Contract expired

Terminated

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

Stage	Description
Terminated	Contract terminated

Amended

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

Stage	Description
Amended	Contract amended

Cancelled

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

Stage	Description
Cancelled	Contract cancelled

Agreement Status Category Map

The Status Category and Status combination determines the actions available for a particular agreement. The Status category map provides an idea of various agreement status categories during the contract lifecycle. The following table describes the purpose of agreement status category maps:

Status Category	Request	In Authoring	Review	In Signatures	In Filing	In Effect	Expired	Terminated	Amended	Cancelled
Status										
Request	√									
Request Approval	√									
Submitted Request	√									
Approved Request	√									
Cancelled Request	√									
In Amendment	√									
Author Contract		√								

Status Category	Request	In Authoring	Review	In Signatures	In Filing	In Effect	Expired	Terminated	Amended	Cancelled
Language Approval		√								
Language Approved		√								
Import			√							
Internal Review		√								
Other Party Review		√								
Internal Signatures				√						
Other Party Signatures				√						
Activated						√				
Being Amended						√				
Being Renewed						√				
Superseded						√				

Status Category	Request	In Authoring	Review	In Signatures	In Filing	In Effect	Expired	Terminated	Amended	Cancelled
Being Terminated						√				
Terminated								√		
Expired							√			
In Reconciliation				√	√					
Reconciled				√	√					
Signature Declined		√		√						
Ready for Signatures				√						
Fully Signed				√						

Admin Entries

You must configure admin entries to meet the business objectives of your implementation along with Comply System Properties. Admin entries are system properties that have different values and you can use them for different purposes.

To create 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' requirements, you can add or create new Admin entries.
2. To create a new Admin entry, click **New.**
3. Type Name, Value, and Code for the Admin entry and click **Save**. Your new Admin entry is saved and added.

Admin Entries in CLM

The following content provides information about various admin entries available in CLM along with their values and purposes.

APTS_AccountHierarchyFields

The APTS_AccountHierarchyFields property allows you to add a maximum of 4 fields that must be displayed on the Agreement Hierarchy for an account. If no value is provided for The property, Account Name, Account Number, and Account Owner fields are displayed. For more information, see Viewing Agreement Hierarchy of an Account.

Name	APTS_AccountHierarchyFields
Value	<Field API Name>:<User defined field label> **Sample Value**: AccountNumber:Account Number,OwnerId:Account Owner,Owner.Name:Owner Name,AccountSource:Account Source
Code	N/A

APTS_ActivateDocumentsSelectAll

When the APTS_ActivateDocumentsSelectAll property is set to true, all documents on the Activate Agreement page are selected. When the APTS_ActivateDocumentsSelectAll property is set to false, all documents on the Activate Agreement page are unselected.

Name	APTS_ActivateDocumentsSelectAll
Value	True

Name	APTS_ActivateDocumentsSelectAll
Code	N/A

APTS_ActivateDocumentsSelectable

When the APTS_ActivateDocumentsSelectable property is set to true, users can select or unselect documents on the Activate Agreement page. When the APTS_ActivateDocumentsSelectable property is set to false, users cannot select and unselect documents on the Activate Agreement page.

Name	APTS_ActivateDocumentsSelectable
Value	True
Code	N/A

APTS_ActivateDocumentsPublishAll

When the APTS_ActivateDocumentsPublishAll property is set to true, all documents are selected for publishing but users can turn the Publish toggle on or off. When the APTS_ActivateDocumentsPublishAll property is set to false, all documents are unselected for publishing but users can turn the Publish toggle on or off.

Name	APTS_ActivateDocumentsPublishAll
Value	True
Code	N/A

APTS_AgreementHierarchyFields

The APTS_AgreementHierarchyFields property allows you to add a maximum of 4 fields that must be displayed on the Agreement Hierarchy page. If no value is provided for The property, the Agreement Number and Status Category fields are displayed. For more information, see Viewing Agreement Hierarchy.

Name	APTS_AgreementHierarchyFields
Value	<Field API Name>:<User defined field label>

Sample Value: Apttus__Contract_End_Date__c:End Date,Apttus__Activated_Date__c,Apttus__Agreement_Number__c:Agreement Number |
| Code | N/A |

APTS_AgreementDocumentActivateMaxFileSize

This property allows you to increase document storage size based on the Salesforce size limit. If the Salesforce storage limit for your org is increased to 25 MB or more, you must update this property to allow users to upload documents with the increased size limit. If this property is not configured, the value is considered 5 MB.

Name	APTS_AgreementDocumentActivateMaxFileSize
Value	<storage size in MB>

Sample value: 25 |
| Code | N/A |

APTS_AgreementStatusOnClauseApproval

This property allows you to define the status and status category of an agreement to be updated after all clauses are approved, canceled, or rejected in the agreement. When this property is not configured, the status and status category of an agreement is not updated after all clauses are approved, canceled, or rejected in the agreement.

Name	APTS_AgreementStatusOnClauseApproval
Value	Value: Status Category|Status

Sample value: In Signature|Ready for Signature |
| Code | N/A |

APTS_AppendVersionNumberToMergedDocs

When the value of the APTS_AppendVersionNumberToMergedDocs admin entry is true and the Document Versioning Properties are enabled, the name of the merged documents will be suffixed with a version number. For more information, see Merging Documents in Salesforce Lightning.

Name	APTS_AppendVersionNumberToMergedDocs
Value	True
Code	N/A

APTS_AsyncCloneAmendRenew

You can use this admin entry when agreements have a large number of documents. When the value of the APTS_AsyncCloneAmendRenew admin entry is true, the cloning, amendment, or renewal process of an agreement happens in the background. The user receives an email notification after the cloning, amendment, or renewal process is complete. By default, the admin entry is set to false. For more information, see Managing Agreement Lifecycle Post-Activation.

Name	APTS_AsyncCloneAmendRenew
Value	True
Code	N/A

APTS_AsyncMergeCall

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 newly published version document in the Notes and Attachment section of the Template. Whenever the agreement document generation exceeds 60 seconds, users get a timeout message and this is not an error message. To make sure the status changes during this scenario, add these Admin entries. For more information, see Document Generation Features List.

Name	APTS_AsyncMergeCall
Value	True
Code	N/A

APTS_AsyncMergeEmail

When the APTS_AsyncMergeEmail property is set to true, you will receive an email notification after the signed document is uploaded in an agreement. For more information, see Document Generation Features List.

Name	APTS_AsyncMergeEmail
Value	True
Code	N/A

APTS_AutoContentSearchable

The APTS_AutoContentSearchable property automatically enables Content Search on an activated agreement. By setting the flag to true, the system skips the prompt to select attachments for content search. The attachment already selected as part of the activation process will be automatically enabled for content search. For more information, see Routing Documents to Content Libraries and Activating an Agreement.

Name	APTS_AutoContentSearchable
Value	True
Code	N/A

APTS_CCIImportAgreementStatusCategory

The APTS_CCIImportAgreementStatusCategory property allows you to configure the visibility of the Intelligent Document Import button on the Agreement Detail page based on the Status Category of the agreement. When the property is not configured and the Status Category of the agreement is Request, In Authoring, In filing, or In Signatures, the Intelligent Document Import button is visible.

Name	APTS_CCIImportAgreementStatusCategory
Value	\<Status Category\> **Sample value**: Amended
Code	NA

APTS_ComplyConfig

The APTS_ComplyConfig property allows you to configure the custom objects that need to be cloned as part of the agreement clone, amend, and renew operation.

Name	APTS_ComplyConfig
Value	XML
Code	You need to provide the configuration in the Code field. For more information, see Configuring APTS_ComplyConfig.

The APTS_ComplyConfig property along with Enable PDF Security (comply system property) allows you to control restrictions for agreement documents:

- Generated in PDF format.
- Checked-in from X-Author Contracts as Final-to be signed with Create PDF attachment option selected.

Name	APTS_ComplyConfig
Value	XML
Code	You need to provide the configuration in the Code field. For more information, see PDF Security for Agreement Documents.

APTS_ContentRecordTypeName

The APTS_ContentRecordTypeName property is used to indicate the content type to associate the published documents with. If The property is not specified, no content type will be used. For more information, see Routing Documents to Content Libraries.

Name	APTS_ContentRecordTypeName

Value	<content type name>
	Sample value: Agreements
Code	N/A

APTS_ContentRepositoryType

The APTS_ContentRepositoryType property allows you to define which content repository must be used for routing documents. The supported setting "content" to use content repository settings for routing documents. 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. For more information, see Routing Documents to Content Libraries.

To activate documents that exceed the file size of 40MB, you must set the value to content or chatter. For more information, see Activating an Agreement.

Name	APTS_ContentRepositoryType
Value	<content repository type>
	Default value: document
	Supported values: content, chatter
Code	N/A

APTS_CustomLinksforActionPanel

The APTS_CustomLinksforActionPanel property enables you to add and customize the action panel. For more information, see Enabling and Customizing the Action Panel.

Name	APTS_CustomLinksforActionPanel
Value	N/A

Code	<API name of button>
	Sample code: Preview_Custom__c,Generate_Supporting_Document_Custom__c,Generate_Custom__c,Generate_Supporting_Document_Custom__c,Generate_Custom__c,

APTS_CycleTimeReportingEnabled

The APTS_CycleTimeReportingEnabled property allows 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. For more information, see Cycle Time Reporting.

Name	APTS_CycleTimeReportingEnabled
Value	True
Code	N/A

APTS_DefaultContentWorkspaceName

The APTS_DefaultContentWorkspaceName 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. For more information, see Using Agreement Rules to Route Content.

Name	APTS_DefaultContentWorkspaceName
Value	<default workspace name>
Code	N/A

APTS_DefaultEmailContactName

The APTS_DefaultEmailContactName property allows you to specify 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 the property is not defined and the agreement does not have a primary contact, the merge fields in the

email will not be resolved to their values. This admin property is mandatory to be configured for the users to be able to send documents for simple review, parallel review or Office 365 review. And also to be able send documents for wet signature or electronic signature.

Name	APTS_DefaultEmailContactName
Value	<Name of the contact>
Code	N/A

APTS_DefaultEmailTemplateFolder

The APTS_DefaultEmailTemplateFolder property allows you to add the name of the default email template folder. For more information, see Sending an Agreement Document for Parallel Review.

Name	APTS_DefaultEmailTemplateFolder
Value	<email template folder name>
Code	N/A

APTS_DefaultHeaderFooterOptionForMerge

The APTS_DefaultHeaderFooterOptionForMerge property allows you to set the Retain Header and Footer or Custom Header and Footer checkbox selected by default on the Merge Documents page. For more information, see Merging Documents in Salesforce Lightning.

Name	APTS_DefaultHeaderFooterOptionForMerge
Value	Retain Header and Footer or Custom Header and Footer
Code	N/A

APTS_DEFAULT_PACKAGE

The APTS_DEFAULT_PACKAGE property allows you to connect X-Author for Contracts to both Conga CLM (Contracts for Salesforce) and Conga CLM packages when they are

installed in the same org. For more information, see Installing Production X-Author for Contracts.

Name	APTS_DEFAULT_PACKAGE
Value	<CLM or CFS>
Code	N/A

APTS_DocumentNamingConvention_<RecordType label name>

The APTS_DocumentNamingConvention_<RecordType label name> property allows you to define a specific naming convention for the generated files based on the record types. If there are no naming conventions defined for the record types in the Admin Entry, the Document Naming Convention defined in Comply System Properties is used as the naming convention for the generated files. For more information, see Contract Document Versioning.

> ⓘ Ensure that you create only one naming convention per record type.

Name	APTS_DocumentNamingConvention_<RecordType label name> **Sample name**: APTS_DocumentNamingConvention_NDA
Value	<naming convention>
Code	N/A

APTS_DocumentSearchBasicFilters

The APTS_DocumentSearchBasicFilters property allows you to add fields that must be displayed on the Document Search page in the Basic Filters section. If The property is not defined, Agreement Number, Agreement Name, Owner ID, Status, Status Category, Agreement Start Date, Agreement End Date, Account, and Record Type fields are displayed. If The property is defined, the defined fields along with Account and Record Type fields are displayed. The Account and Record Type fields are displayed irrespective of the property. For more information, see Searching Agreement Documents.

Name	APTS_DocumentSearchBasicFilters

Value	N/A
Code	\<Field API Name\>,\<Field API Name\> **Sample Code**: Apttus__Contract_End_Date__c,Apttus__Activated_Date__c,Apttus__Agreement_Number__c

APTS_DocuSignRetrieveAsCombinedRecordType

The APTS_DocuSignRetrieveAsCombinedRecordType property enables you to combine the documents, based on the record type, when you send for signatures using DocuSign. If you set to the property to "all;\<recordtype\>;\<recordtype\>;\<recordtype\>", all takes precedence over the record types. This admin entry overrides the system property **RetrieveAsCombinedDocument** in DocuSign. For more information, see Retrieving DocuSign Certificate of Completion.

Name	APTS_DocuSignRetrieveAsCombinedRecordType
Value	semicolon separated record type names or all **Sample value**: NDA;sla;MSA
Code	N/A

APTS_DoNotCopyOpportunityToAdobeAgreement

Deprecated. For information on the new custom setting, see Configuring Conga-Adobe Custom Settings.

APTS_DoNotPrefixCurrency

In the multicurrency enabled orgs, the APTS_DoNotPrefixCurrency property allows you to not prefix currency symbols before the currency-related fields in the generated documents based on the Enable Formatting value in X-Author for Contracts. For more information, see Defining Template Locale.

Name	APTS_DoNotPrefixCurrency
Value	True
Code	N/A

APTS_DownloadableLinkExpiration

If no value is added, the viable days of the downloadable link are considered as 7 days and after 7 days the downloadable link will be inaccessible. For more information, see Emailing Multiple Agreement Documents.

Name	APTS_DownloadableLinkExpiration
Value	<number of days to expire the downloadable link>
Code	N/A

APTS_EmailTemplateForReview

The APTS_EmailTemplateForReview property allows you to add the name of the email template for Send for Review action. For more information, see Configuring Email Templates in Lightning.

> ⚠ The property can only specify values for Email Templates with the "Available for Use" flag set to true.

Name	APTS_EmailTemplateForReview
Value	<template name or template unique name>
Code	N/A

APTS_EmailTemplateForReviewSignatures

The APTS_EmailTemplateForReviewSignatures property allows you to add the name of the email template to use for Send for Review and Send for Signatures actions. The property is only used if APTS_EmailTemplateForReview and APTS_EmailTemplateForSignatures are not specified. For more information, see Configuring Email Templates in Lightning.

> ⚠ The property can only specify values for Email Templates with the "Available for Use" flag set to true.

Name	APTS_EmailTemplateForReviewSignatures
Value	<email template name or email template unique name>
Code	N/A

APTS_EmailTemplateForSignatures

The APTS_EmailTemplateForSignatures property allows you to add the name of the email template for Send for Signatures action. For more information, see For more information, see Configuring Email Templates in Lightning.

> ⚠ The property can only specify values for Email Templates with the "Available for Use" flag set to true.

Name	APTS_EmailTemplateForSignatures
Value	<email template name or email template unique name>
Code	N/A

APTS_EnableCustomEmailAddressLookup

The APTS_EnableCustomEmailAddressLookup property enables you to launch the custom Email Address Lookup pop-up for the Send for Review and Send for Signature functionalities. On this page, you can quickly search and select contacts for the **Additional To**, **Cc**, and **Bcc** fields, if there is a large number of contacts (for example, more than one million). For more details, see Sending an Agreement Document for Review and Finalizing an Agreement.

Name	APTS_EnableCustomEmailAddressLookup
Value	True
Code	N/A

APTS_EnableLightningCommunity

When the APTS_EnableLightningCommunity admin entry is set to true, all users in an org are considered as Lightning Community users and are navigated to the Agreement Detail page after a user clicks New Agreement on an Opportunity.

When the admin entry is set to false, is not added, or has an invalid value, all users in an org are considered as Classic Community users and are navigated to Classic Community after a user clicks New Agreement on an Opportunity.

Name	APTS_EnableLightningCommunity
Value	True
Code	N/A

APTS_EnableTermExceptionsInAuthor

The APTS_EnableTermExceptionsInAuthor property 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. For more information, see Configuring Agreement Term Exception.

Name	APTS_EnableTermExceptionsInAuthor
Value	True
Code	N/A

APTS_EnableValidationForEmailWithoutUserContact

Setting the APTS_EnableValidationForEmailWithoutUserContact property to true displays an error message while sending a document for signatures or review when the email IDs or contacts specified in the **To** or **Additional To** fields are invalid. For more information, see Sending an Agreement Document for Parallel Review.

Name	APTS_EnableValidationForEmailWithoutUserContact
Value	True

Code	N/A

APTS_HighlightFieldsUsingControlPanel

The APTS_HighlightFieldsUsingControlPanel allows you to view the Highlight Fields options under the work tab in X-Author for Contracts. When the APTS_HighlightFieldsUsingControlPanel is set to true the Highlight Fields option is visible under the X-Author for Contracts work tab for users, and when set to false, the menu is hidden for users. If the APTS_HighlightFieldsUsingControlPanel admin entry is not added, then by default, the value is set to true. For more information, see Highlighting Smart and Read-Only Fields.

Name	APTS_HighlightFieldsUsingControlPanel
Value	True
Code	N/A

APTS_IncludePrimaryContact

This property adds the primary contact from the agreement to the email's To field when you send for review or signatures.

Name	APTS_IncludePrimaryContact
Value	True
Code	N/A

APTS_InEffectViewMetadataFields

The APTS_InEffectViewMetadataFields property allows you to add fields that must be displayed on the In-Effect View page in the Agreement Details In Effect section. If The property is not defined, Agreement Name, Agreement Start Date, Agreement End Date, Term (Months), and Total Agreement Value fields are displayed. If The property is defined, only the defined fields are displayed, but not the default fields. For more information, see Accessing In-Effect View.

Name	APTS_InEffectViewMetadataFields

Value	N/A
Code	<Field API Name>,<Field API Name> **Sample code:** Apttus__Contract_End_Date__c,Apttus__Term_Months__c,Apttus__Total_Contract_Value__c

APTS_IsRequiredToVerifyApttusMetadata

When you configure this admin entry and check-out an agreement document in X-Author Contracts, you can restore the metadata of a corrupted agreement document. For more information, see Restoring Document Metadata.

Name	APTS_IsRequiredToVerifyApttusMetadata
Value	True
Code	N/A

APTS_ExcludedNamespaces

This admin entry allows you to add a comma-separated list of namespaces to exclude objects from the wizard dropdown.

If you have configured this admin entry multiple times, then the latest configured admin entry is considered to exclude objects from the wizard dropdown. If this admin entry is not configured, the value provided in the *Excluded Namespaces* comply system property will be considered to exclude objects from the wizard dropdown.

Name	APTS_InEffectViewMetadataFields
Value	N/A
Code	**Code**: comma-separated objects **Sample Code**: Apttus__OCCAccessMode__c, Apttus__IDE

APTS_KeepSectionBreaks

When you set the APTS_KeepSectionBreaks admin entry to false, page breaks are not added between merged documents.

Name	APTS_KeepSectionBreaks
Value	False
Code	N/A

APTS_LargeDocSObjects

By default, CPQ and CLM consider Proposal Line Item and Agreement Line Item as Large Objects for document generation. In case you used any other object in a template, you must use the APTS_LargeDocSObjects property to define such objects as Large objects. You can specify multiple objects as Large Objects and also provide a batch size for each of these objects.

Name	APTS_LargeDocSObjects
Value	N/A
Code	<Object_API_name=<Batch Size>> **Sample code:** Apttus_QPConfig__ProposalLocation__c=5 QTC_Proposal_Related_Line_Item_c=1000

APTS_MergeCallTimeOut

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. For more information, see Objects Supporting Document Generation.

Name	APTS_MergeCallTimeOut
Value	True

Code	N/A

APTS_MS_EnableNameSort

The APTS_MS_EnableNameSort property allows you to specify 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.

Name	APTS_MS_EnableNameSort
Value	True
Code	N/A

APTS_NoISOCurrencyFieldObjects

Use the APTS_NoISOCurrencyFieldObjects 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. The property is only applicable to templates in multi-currency org.

Name	APTS_NoISOCurrencyFieldObjects
Value	XML
Code	<Object API name>

APTS_NoNameFieldObjects

Use the APTS_NoNameFieldObjects 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.

Name	APTS_NoNameFieldObjects
Value	XML

Code	<Object API name>

APTS_Password

The APTS_Password property allows you to create a password for protecting Microsoft Word agreements that are generated by the application. It also allows the application to password protect generated Microsoft Word documents.

Name	APTS_Password
Value	<password>
Code	N/A

APTS_ProfilePermissions

The APTS_ProfilePermissions property allows you to define custom permissions for user profiles.

Name	APTS_ProfilePermissions
Value	JSON
Code	You need to define the access details in this field. For more information, see Assigning Custom Permissions to User Profiles.

APTS_Protection

The APTS_Protection property allows you to specify 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. The property must be configured before configuring the Agreement Protection tab.

Name	APTS_Protection
Value	Enter 1 to turn document protection on or 0 to turn it off
Code	N/A

APTS_RecordTypeUpdateOnAmend

The APTS_RecordTypeUpdateOnAmend property enables you to update record type while amending an agreement. If you set to the property to "all;<recordtype>;<recordtype>;<recordtype>", all takes precedence over the record types.

Name	APTS_RecordTypeUpdateOnAmend
Value	semicolon separated record type names or all **Sample Value**: NDA;SLA;msa
Code	N/A

APTS_RestrictEmailToCurrentUserOnActivate

If the APTS_RestrictEmailToCurrentUserOnActivate property is set to true, the current user does not receive the agreement activation email notification. For more information, see Activating an Agreement.

APTS_RetainFileNameForParallelReviewMergedDocument

When you end a parallel review of an imported document, the reviewed document is merged with the latest reviewed document. If the APTS_RetainFileNameForParallelReviewMergedDocument property is set to true, the merged document will retain the name of the imported document. For more information, see Sending an Agreement Document for Parallel Review.

Name	APTS_RetainFileNameForParallelReviewMergedDocument
Value	True
Code	N/A

APTS_SkipEmailTemplateSelection

The APTS_SkipEmailTemplateSelection property allows you to indicate whether the email template selection step should be skipped. For more information, see Generating an Agreement.

Name	APTS_SkipEmailTemplateSelection
Value	True
Code	N/A

APTS_SkipFileSplitWhileSavingFile

When you are upgrading CLM to Spring '21 or a later version and need to migrate Attachments that are greater than 10 MB in size to Files, you must set this property to true.

> (i) Post-migration, this property must be set to false.

Name	APTS_SkipFileSplitWhileSavingFile
Value	True
Code	N/A

APTS_SkipContentSearchForActivation

Prerequisite: The *Enable File* comply system property must be enabled.

When the value is true, the Enable Content Search step is skipped during activation. To use the APTS_SkipContentSearchForActivation property, the value of the **APTS_AutoContentSearchable** must be **False**. For more information, see Activating an Agreement.

Name	APTS_SkipContentSearchForActivation
Value	False
Code	N/A

APTS_SkipRemoveDraftDocumentOnActivation

Prerequisite: The *Enable File* comply system property must be enabled.

When the value is true, the remove draft document step is skipped during activation. To use the APTS_SkipRemoveDraftDocumentOnActivation property, the value of the **APTS_AutoContentSearchable** must be **False**. For more information, see Activating an Agreement.

Name	APTS_SkipRemoveDraftDocumentOnActivation
Value	False
Code	N/A

APTS_StatusCategoriesToExcludeForDocuSign

This property allows you to specify agreement status categories that should not be changed to In Signatures after the agreement document is sent for DocuSign eSignature. Specify multiple status categories separated by comma.

If an agreement has any of the status categories specified in this property, the status remains unchanged after the document is sent for DocuSign eSignature.

Name	APTS_StatusCategoriesToExcludeForDocuSign
Value	Expired, Terminated, Amended, Cancelled, Renewed, In Effect
Code	N/A

APTS_StatusCategoriesToIncludeForDocuSign

This property allows you to specify agreement status categories that should be changed to In Signatures after the agreement document is sent for for DocuSign eSignature. Specify multiple status categories separated by comma.

If an agreement has any of the status categories specified in this property, the status is changed to In Signatures after the document is sent for DocuSign eSignature.

Name	APTS_StatusCategoriesToIncludeForDocuSign
Value	Request, In Authoring, In Filing
Code	N/A

Values set in this property overrides the values set in
 APTS_StatusCategoriesToIncludeForDocuSign property.

For example, if Expired status category is specified
APTS_StatusCategoriesToExcludeForDocuSign as well
APTS_StatusCategoriesToExcludeForDocuSign property, then the status category of the
agreement having current status category Expired, will be changed to In Signatures.

APTS_SuppressAutoReviewEmails

When the value of the property is true, you will be unsubscribed from parallel review emails
(review completion, review error, and review cycle completion). This property is not
applicable for review cancellation and ending review from CLM as the emails are sent from
the user's domain.

Name	APTS_SuppressAutoReviewEmails
Value	True
Code	N/A

APTS_TemplateSelectionGuidance

The APTS_TemplateSelectionGuidance property allows you to add help text in the
Template Selection page to guide users to select appropriate templates when users
preview documents, generate documents, regenerate documents, and generate supporting
documents. The help text is displayed above the template selection section. For more
information, see Generating an Agreement.

Name	APTS_TemplateSelectionGuidance
Value	N/A
Code	**Sample code**: Please select an appropriate template.

APTS_TranslatePickValuesInDocs

When you set the APTS_TranslatePickValuesInDocs admin entry to true, the field value gets
added in the generated document. If a conditional segment is set, the condition takes both
API and values. You can either use API names or Values but not both.

When an administrator sets the APTS_TranslatePickValuesInDocs admin entry to false or does not add the admin entry, the API Name gets added in the generated document by default.

Name	APTS_TranslatePickValuesInDocs
Value	True
Code	N/A

APTS_UIPageConfig

The APTS_UIPageConfig property is used to indicate the visual force page to perform the publish action. The integration module provides the Visualforce page Apttus_Content__PublishContent.

Name	APTS_UIPageConfig
Value	XML

Code	Sample Code:
	
	`<UIPageConfig>`
	`<UIAction name="publish_document">`
	`<CustomPage> <Name>Apttus__PublishDocument</Name>`
	`</CustomPage>`
	`</UIAction><UIAction name="publish_content">`
	`<CustomPage>`
	`<Name>Apttus_Content__PublishContent</Name>`
	`</CustomPage>`
	`</UIAction>`
	`<UIAction name="publish_chatter">`
	`<CustomPage> <Name>Apttus__PublishChatter</Name>`
	`</CustomPage>`
	`<UIAction name="review_offlinedocument">`
	`<CustomPage> <Name>Apttus__ReviewOfflineDocumentLightning</Name>`
	`</CustomPage>`
	`</UIAction>`
	`</UIPageConfig>`

APTS_UseWizardServer

Apttus merge web service endpoint. For more information, see Contract Wizard in Classic.

Name	APTS_UseWizardServer
Value	True
Code	N/A

APTS_UseWorkflow

The APTS_UseWorkflow property disables the creation of a default set of tasks when an agreement is generated. In some cases, the default tasks created to ensure Signing, Scanning, and Attaching the scanned image to the agreement record is redundant or is taken care of by a different workflow process. In such cases, the default behavior of the system needs to be modified to ensure those tasks are not created. For more information, see Managing Workflow.

Name	APTS_UseWorkflow
Value	True
Code	N/A

APTS_WizardPersistHiddenValue

When you set APTS_WizardPersistHiddenValue to true and you run a wizard containing a field that has a combination of *Set this control value* and *Hide this control* input rules, the field value is set in the object you are creating. When you set APTS_WizardPersistHiddenValue to false and you run a wizard containing a field that has a combination of *Set this control value* and *Hide this control* input rules, the field value is not set in the object you are creating. For more information, see Configuring Step Input Rules from the Wizard Designer.

Name	APTS_WizardPersistHiddenValue
Value	False
Code	N/A

APTS_XAAddInLoadType

The APTS_XAAddInLoadType property allows you to define the installation approach to access the X-Author for Contracts 2.0 add-in. You can use any one of the following supported values:

- **centralized** - If you install the X-Author for Contracts 2.0 add-in using Centralized Deployment via the Office 365 admin center, set The property value to "centralized". Centralized Deployment supports both Windows operating system and Mac operating system. For more information on installing X-Author for Contracts 2.0 add-in using Centralized Deployment, see Installing Production X-Author for Contracts 2.0.
- **sideloading** - If you are unable to install the X-Author for Contracts 2.0 add-in using Centralized Deployment in Office 365, alternatively you can install the add-in on the Mac system using the Sideloading approach. If you install the X-Author for Contracts 2.0 add-in on a Mac system using a manifest file, set The property value to "sideloading". For more information, contact Support.
- **appsource** - If you access the X-Author for Contracts 2.0 add-in using Microsoft Store, set The property value to "appsource". For more information, contact Support.

If The property is not defined, the Centralized Deployment approach is used to access the X-Author for Contracts 2.0 add-in.

Name	APTS_XAAddInLoadType
Value	**Default value**: centralized Supported values: centralized, sideloading, appsource
Code	N/A

Comply System Properties

You can enter one or more of the following property details.

Classic Navigation: Setup > Build > Develop > Custom Settings > Comply System Properties > Manage > Edit.

Lightning Navigation: Setup > Custom Code > Custom Settings > Comply System Properties > Manage > Edit.

Property	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 checkbox is always selected when you choose to save as Final - to be signed from the check-in dialog. You may use this field when you want to finalize an agreement document.
Auto Enable Reconciliation	Select this and the Reconcile Document option is always selected when you go to check-in an agreement document.
Agreement Number Field For Imported Docs	In this field, specify the API name of the field you want to use. For example, use Apttus__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 to 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. • If Auto Enable Reconciliation is True and Allow Reconciliation Selection Override is True, the **Reconcile** checkbox is by default selected on check-in. The user can also deselect (override) the **Reconcile** button. • If Auto Enable Reconciliation is True and Allow Reconciliation Selection Override is False, the **Reconcile** checkbox is by default selected on check-in. The user cannot deselect (override) the **Reconcile** button. • If Auto Enable Reconciliation is False, the user can select or deselect the **Reconcile** checkbox on check-in. However, the **Reconcile** checkbox is disabled if there is no smart field in the agreement document.
Allow Regenerate From XAC	Select this checkbox to display the **Regenerate** button on the X-Author toolbar.

Property	Description
Ancestor selection for Import Offline	Select this checkbox to allow users to link an offline document to an existing version of a document.
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 to Agreement Number/Header Configuration. 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 the **Auto Enable Private Indicator** is selected for documents.
Asynchronous Checkin Recipient	Enter a recipient role (Contract Owner, Logged in XAC user or Both) to receive Asynchronous Check-in email notification. **Supported Values**: Contract Owner, Logged in XAC user, or Both **Default Value**: Both
Auto Enable Asynchronous Checkin	Select the checkbox to auto-select the Asynchronous Check-in checkbox available on the X-Author Contracts Check-in pop-up window.
Ancestor Selection For Import Offline	Select the checkbox to allow a user to link an offline document to an existing major version of a document.

Property	Description
Auto Sync With Opportunity	Indicates whether the agreement will be automatically synchronized with the opportunity when the agreement is accepted.
Document Versioning Naming Convention	Deprecated
Excluded Namespaces	Allows you to add a comma-separated list of namespaces to exclude objects from the wizard dropdown
Bypass Sharing	Indicates whether apex code can bypass record sharing during selective operations such as clone and deleting draft attachments.
CLM Lite License Profile(s)	Allows you to add a semicolon-separated list of user profiles that will use the Contract Management lite license. **Default value**: Apttus_Lite
CLM Lite License Admin Email	Allows you to add a list of semicolon-separated email addresses that need to receive the Contract Management Lite License usage report. **Sample value**: sysadmin@example.com; admin@example.com; exec@example.com
Email Lite Monitoring Report to Apttus?	Select the checkbox to send the Contract Management Lite License usage report to Apttus Administrator.
Enable document permissions for review	Allows users to view the **Set field and clause permission** toggle in the second step of the parallel review and set the field or clause level permissions for each reviewer in the third step of the parallel review.

Property	Description
Inactivate Non-Compliant Lite User	Select the checkbox to deactivate the Lite user after 30 logins.
Intelligent Import for Signed Document	Select the checkbox to view the intelligent import option when you click the Upload Signed documents button and intelligently import signed documents.
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.

Property	Description
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: - %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. > ⓘ **Note** > > 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. > You can import documents in X-Author for Contracts and Online Contract Collaboration when this property is enabled.
Email Template For Checkin Notification	The email template for sending check-in notifications.

Property	Description
Enable Clause Approvals	This checkbox 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 Conga CLM 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 will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created. For more information on how you can configure Document Versioning for your org, refer to Enabling Contract Document Versioning.
Enable File	Select **Enable File** checkbox to enable **File Type** to be visible in the **Notes & Attachment** section of an agreement. > ⓘ **Note** > When the Enable Files property is enabled, "Salesforce CRM Content User" should be enabled for a user to check in a document from X-Author Contracts.
Enable Merge Call Debug	Enable Merge Service debugging.
Enable Multiple Checkout	This feature will be functional in later releases. Indicates whether multiple checkouts are 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.

Property	Description
Enable Submit Merge Call	Enable to submit merge calls for processing. When enabled, the "Submit" button is displayed as a document generation option.
Enable Template Versioning	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 Contract Management versions prior to 8, so this property may already be enabled.
Filter By The Primary Agreement Status	ⓘ This property only applies when you send documents for review using the new UI. Allows filtering of agreements (Related/Sibling/Parent/Child/Amended/Renewed) by primary agreement Status Category or Status. When this property is enabled, users sending a document for review can only see the agreement documents (Related/Sibling/Parent/Child/Amended/Renewed) that have the same Status or Status Category as the primary agreement. When this property is disabled, users sending a document for review can see all the agreement documents (Related/Sibling/Parent/Child/Amended/Renewed) irrespective of the primary agreement status category or status.
Footer Datetime Format For Imported Docs	Specify the format in which the 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 the Setting date and time format for the 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.

Property	Description
Instance URL	The Salesforce instance URL for redirecting to custom pages.
Large Doc Process Batch Size	You can add the number of rows of the large objects (agreement or quote line items and objects defined using the APTS_LargeDocSObjects property) to retrieve in each batch iteration to build the data source for the template. The default value of the **Large Doc Process Batch Size** is 1*000* and a maximum of *2000*. You can define a value lower than 2000, based on template complexity. **Sample value**: 500
Large Doc Threshold	Enter a number of the agreement line items in the contract when exceeded indicates that the contract is a large document. This property is applicable only for generating documents but not for regenerating or generating supporting documents. The default and the maximum value of the **Large Doc Threshold** is *10000*. You can define a value lower than *10000*. Setting a value of *-1* for the Large Doc Threshold invalidates the setting. **Sample value**: 1000
Max Child Level	The maximum level of lookups and child objects available from the parent object to generate the merge data. The value can be 1 or 2. For example, Agreement is the parent object, Agreement Fee is the child object of Agreement and Agreement Fee Adjustment is the child of Agreement Fee and grandchild of Agreement.
Merge Call Timeout Millis	The timeout in milliseconds for the merge request. Default value = 120000 milliseconds.
Merge Webservice Endpoint	Type the merge web service endpoint. For example https://merge.congacloud.com/cgi-bin/MergeServer/Bin/mmcgi.exe
Enable Online Contract Collaboration	Deprecated

Property	Description
Organization-Wide Email Address Display	Enter the display name that you have entered while configuring organization-wide email addresses. Ensure that you have selected the Use Organization-Wide Email Address checkbox. For more information about configuring organization-wide email addresses, see Setting Up Organization-Wide Email Address.
Override Playbook default filter	Allows you to specify the Playbook filter names separated by commas that should inherit filter value from template attributes on clicking the Playbook tab in X-Author. **Sample value**: Category, Subcategory
Parallel Review	Select the checkbox to allow multiple users to review the document in collaboration. The property is disabled by default.
Parallel Review for related agreements	Allows you to enable parallel review for related agreements when you send a related agreements document in DOCX with the type as Agreement Document. If the checkbox is selected and a user sends a related agreement for review, a review cycle is created for related agreements. If the checkbox is left unselected and a user sends a related agreement for review, a review cycle is not created and the related agreement documents are considered as supporting documents. Ensure that the Parallel Review property is enabled.
PDF Owner Password	The password required to change the permissions of the PDF document like printing or editing. ⓘ **Note** 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.

Property	Description
Restrict Checkin of Documents	List of comma-separated Status category and Statuses for which Check-in and Check-out actions will be restricted in X-Author for Contracts. **Sample value**: In Authoring, Other Party Signatures, Submitted Request
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.
Unlock Smart Elements	If this checkbox is selected, the user can delete smart elements from the generated document. If this checkbox is deselected, the user cannot delete smart elements from the generated document.
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.
Use text areas for wizards	Allows you to have more characters available for questions and answers in your wizards
Use Organization-Wide Email Address	Select the checkbox to use a common email address for email communication. You must configure the *Organization-Wide Email Address Display* comply system property to use an organization-wide email address.

Property	Description
XAJS End Point	Allows you to provide X-Author for Contracts 2.0 (XAJS) URL to route the documents to intelligent data extraction software via XAJS. ⓘ You need to configure the remote site setting of the org before you configure XAJS End Point. **Value**: https://xajs.apttuscloud.com

Comply Custom Properties

Classic Navigation: Setup > Build > Develop > Custom Settings > Comply Custom Properties > Manage > Edit.

Lightning Navigation: Setup > Custom Code > Custom Settings > Comply Custom Properties > Manage > Edit.

The following table depicts comply custom properties and their description.

Property	Description
Child Object Types	Allows you to enter comma-separated values identifying the API name of the Child Objects you want to support in your Rulesets.
Doc Assembly Rule FieldSet Name	Allows you to enter the API name of the fieldset you created in the Doc Assembly Rule FieldSet Name field.
Doc Assembly Rule Static FieldSet Name	Allows you to enter the API name of the static fieldset you created in the Doc Assembly Static FieldSet Name field.

Custom Permissions

Custom permissions allow you to give access to certain X-Author Contracts features for a user profile.

Classic Navigation: Setup > Build > Develop > Custom Permissions.

Lightning Navigation: Setup > Custom Code > Custom Permissions.

The following table lists the custom permissions available in the Contract Management application:

Custom Permission	Description
XA_CheckinAsFinal	This permission allows users to view the following save options on the Check-in document page: • Update Current Version • With Redlines • Without Redlines • Final - to be signed
XA_CheckInWithoutRedlines	This permission allows users to view the following save options on the Check-in document page: • Update Current Version • With Redlines • Without Redlines
XA_CheckInWithRedlines	This permission allows users to view the following save options on the Check-in document page: • Update Current Version • With Redlines ⓘ Irrespective of the user profile permissions, any user can check-in a document with redlines using X-Author for Contracts 1.0.
XA_Contracts	Allows users to view the Contracts tab in X-Author Contracts.
XA_Template	Allows users to view the Templates tab in X-Author Contracts.
XA_UnlockReadOnlyClause	Allows users to modify read-only clauses in X-Author Contracts.
XA_UnprotectDocument	Provides full access to all the documents irrespective of protection type enforced at the document level.

Custom Permission	Description
XA_disableautocheckout	This permission when set to true disables the auto check out option for the user when they perform the following actions: • Create and check in offline document • check in agreement document • check in template • Send document for review • Compare and merge document • Regenerate/regenerate with redlines ⓘ This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.
XA_hidecheckoutmenu	This permission hides the Open and Open and Update option for the user. ⓘ This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.
xa_unprotectdocument	This permission allows users to view the document protection toggle button.
xa_disableimportoffline	This permission, when set to true, disables the Import Offline option for the user and when set to false makes the option available for the user. When this custom permission is not added, the Import offline option is available for the user by default. ⓘ This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.

Custom Permission	Description
xa_disablecreateoffline	This permission, when set to true, disables the Create Offline option for the user and when set to false makes the option available for the user. When this custom permission is not added, the Create offline option is available for the user by default. ⓘ This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.

CLM Glossary

This section lists the terms and their definitions of the Conga CLM application.

A

Term	Definition
Agreement	Is a set of terms and conditions agreed between two or more parties.
Agreement Document Protection	Conga CLM uses Agreement Document Protection to help users protect your documents when they are generated in Microsoft Word format.
Agreement Explorer	Is a search and reporting feature that allows you to search records in the Agreement object through the use of configurable and reusable search reports.
Agreement Line Item	Represents a product or service line item associated with an agreement.
Agreement Lock	Represents a lock on the agreement.
Agreement Protection	Specifies protection settings for agreements by the Contract Wizard.

Term	Definition
Agreement Rule	Allows you to identify how an agreement request is processed when you click the Submit Request action button.
Amend	The Amend action button enables you to modify the contract.
Retention Policy Schema	An XML schema describing the policy specification is provided as a static resource named Retention Policy Schema.

C

Term	Definition
Clause	Clauses are modular blocks of text that are used frequently across multiple templates.
Contract	Is an agreement with specific terms between two or more entities.
Contract Document Versions	Contract Document Versioning enhances existing version control by introducing a solution framework of document versioning at the Agreement record level.
Contract Management	Contract Management (CM) or Contract Lifecycle Management (CLM) or Comply Management is the process of systematically and efficiently managing contract creation, execution, and analysis.
Cycle Time Reporting	Provides organizations the ability to track the time that has elapsed between any two statuses or status categories.

D

Term	Definition
Document	Is generated by merging information stored in a record with an existing template.

Term	Definition
Dashboard	Organizes key statistics in easy to understand, bottom-line format, allowing you to gain the insight you need to fulfill your business needs.
Document Finder	Helps your contract managers, sales persons, and legal teams to easily filter and find agreement documents directly from an agreement record.
Dynamic Document Assembly	Enables you to preconfigure filter rules that drive a sequence of prescribed dynamic clause or attachment insertions in a generated document.

E

Term	Definition
Expire	The Expire action is used to mark the agreement as Expired after the agreement term ends.

M

Term	Definition
Merge web Service	Thee Merge Web Service APIs are used for generating and manipulating documents.

O

Term	Definition
Object	Is a definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce, such as Contacts or Accounts, while others are specific to Conga CLM functionality, such as Templates or Agreements.
Organization/Org	Is a deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications and is separate from all other organizations.

P

Term	Definition
Page layout	Allows you to control the layout and organization of detail and edit pages.

R

Term	Definition
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a Contact, an Account, or an Opportunity.
Record Type	Allows you to offer different business processes, picklist values, and page layouts to different users.
Renew	The Renew action enables users to create a new version of the agreement.
Reports	Salesforce delivers standard report folders containing reports for each record type. For example, Accounts, Opportunities, Leads, and so on.
Retention Policy	Determines the length of time a record must be stored.

T

Term	Definition
Template	Is a blueprint used to generate a wide variety of document types when merged with data from agreements or quotes.
Template versioning	Template Versioning provides a solution framework of document versioning at the Template level to track template versions against generated documents.
Terminate	Terminate Action enables users to terminate a contract.

W

Term	Definition
Wizard	A wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record.
Wizard Component Library	This tab is used to create reusable Inputs and Steps for your Wizard Designs.

Frequently Asked Questions

This page lists the frequently asked questions and answers.

Is there API request limit in Salesforce?

There are no limits for outbound calls from Contract Management but Salesforce imposes limits for the total API requests (calls) per 24-hour period for an org. For more information, see API Request Limits and Allocations.

Does DocuSign have API call rate limit?

There are no limits for outbound calls from Contract Management to DocuSign but DocuSign has implemented API Call Rate Limits to balance loads. For more information, see API Call Rate Limits.

Conga CLM Limitations

The following features are not supported in Lightning:

- Document Assembly Rulesets
- Dependent lookups (filtering of a lookup based on other lookups) are not supported in Lightning. For more details please refer to Salesforce Documentation.

Comply User Properties

The comply user properties allow you to customize permissions for specific profiles or users.

To configure comply user properties

1. Go to **Setup** > **Custom Code** > **Custom Settings** > **Comply User Properties** > **Manage**.
2. Click **New** in the Default Organization Level Value section.

3. Select Profile or User from the Location dropdown.
4. According to your selection in the previous step, enter a profile name or user name and click the lookup icon () to open the Lookup window.
5. Select a relevant profile name or user name.
6. Enable or disable the following property for the selected profile or user and click **Save**.

> ⓘ You can repeat the steps from 2 to 6 to customize permissions for other profiles or users.

Property	Description
Show Add More Button During Review	Select the checkbox to allow users to view the Add more button while sending documents for review to add supporting documents from their local or shared drive. By default, this property will be enabled for all users. By default, if this setting is not configured, the **Add more** button is visible to all users.

CLM for Users

This section describes how Conga Contract Lifecycle Management (Conga CLM) works and how to manage contracts for your organization and your customers.

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

Before using Conga CLM, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and terms and definitions
- If you are new to Conga CLM, begin here: get started.

This section describes the following tasks:

- **Creating an Agreement from an existing Account or Opportunity:** You can choose an existing Account or Opportunity to create a new agreement.
- **Generating an Agreement:** After creating an Agreement, you can use a template to generate a document and preview it.
- **Import an Offline Agreement or Document**: You can create an agreement from a third-party paper or import an offline document.
- **Sending an Agreement for Review:** You can send the generated Agreement document to the customer for review.

- **Completing Negotiations:** After the review phase, the terms and conditions are negotiated and finalized between the engaged parties.
- **Activating an Agreement:** After an Agreement is finalized and signed, you can activate the Agreement to bring it into effect.
- **Searching Content in Agreement Documents**: You can search content in all the agreement documents using smart search.
- **Reporting:** You can store the activated agreements in different formats, such as reports and dashboards.

Select one of the following topics for more information:

- Setting Up CLM
- Managing Contract Lifecycle
- Managing Agreement Lifecycle
- Working with Agreements
- Contract Document Versioning
- Contract Wizard in Classic
- Reports and Dashboards
- Conga CLM on Salesforce Lightning
- Frequently Asked Questions in CLM
- Appendix

Setting Up CLM

This section covers the following topics:

- Logging in to CLM
- Managing User Profiles

Logging in to CLM

This section explains how to log in to Contract Management

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

Prerequisites

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

To log on to Contract Management

1. Go to http://www.salesforce.com. If your organization is using a sandbox or test environment to access Contract Management, for example, as part of your User Acceptance Testing (UAT) process, go to http://test.salesforce.com.
2. Click **Login**.
3. Type your **User Name** and **Password**, and click **Login into Salesforce**.
   You are successfully logged into Contract Management.
4. Navigate to the Salesforce.com App Menu, and select **Contract Management** to access the Contract Management tabs.
5. Navigate to the **Opportunities** or **Accounts** tab.

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

Managing User Profiles

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

Profile Name	Available Permissions Description
Administrator	Can configure and customize the application. Has access to all Contract Management functionality that does not require an additional license.
Contract Manager	Can create, edit, execute, and approve contracts. This profile can also delete contracts as long as they are not executed. Can manage clause and language template library. Has access to X-Author functionality

Profile Name	Available Permissions Description
Read Only	Can view the organization's setup, run and export reports, and view, but not edit other records.
Requesto r	Can initiate new contract requests and use the Contract Wizard to assemble standard contracts, but does not have access to X-Author. Can perform some limited searches and reporting

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

Contract Management User Roles and Tasks

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

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

Role	Description
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

Managing Contract Lifecycle

This topic is not available in Salesforce. To view a similar topic in CLM for Salesforce, see Managing Agreement Lifecycle.

Managing Agreement Lifecycle

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

This section covers the following topics:

- Creating an Agreement
- Use Case for Creating an Agreement
- Generating an Agreement
- Sending an Agreement Document for Review
- Sending an Agreement Document for Parallel Review
- Sending an Agreement Document for Microsoft Teams Review
- Sending an Agreement Document for Collaborative Review Using Office 365 Review
- Negotiating an Agreement Document
- Finalizing an Agreement
- Activating an Agreement
- Managing Agreement Lifecycle Post-Activation
- Working with Offline Agreements

Creating an Agreement

You can create an agreement from Opportunities, Accounts, Contacts, and Agreements tab. When drafting your agreement record, you fill out the mandatory data fields, such as Agreement Name and Account for your agreement record. The system automatically populates the system fields, such as Status Category and Status fields, which help in identifying which step of the agreement process is currently in the agreement lifecycle. For details on various Status categories, Statuses, and Agreement Actions, see Apttus Status Categories and Statuses and Agreement Actions. To complete the agreement, you must fill out various data fields relevant to your agreement. For the complete list of agreement fields, see Agreements Fields.

You can also create an agreement using the Contract Wizard. The Contract Wizard enables you to choose from and execute runtime Wizard instances based on pre-configured Wizards to create well-formed agreements.

To create an agreement

1. On the Home page click ⌄ next to the Agreement tab and select **New Agreement**.
    or
    Navigate to the Agreements tab and click the **New** button.
    or
    On the Opportunities Detail page, Contact Detail page, or the Account Detail page, navigate to Agreements section and click **New**.
2. In the Select a record type section, select a record type and click **Next**.
3. In the New Agreement Form, enter the required details. Entering details in the Additional Fields section is optional. If no fields are configured for the New Agreement Form, the New Agreement Form is not displayed.
    For information on how to configure fields for the New Agreement Form, refer to Configuring Intelligent Discovery Fields.
4. Click **Next**.
5. Review and edit the details on the New Agreement Edit Form and click **Create**.
    A new agreement record is created.

If the Action Panel is enabled by your administrator, you can access action buttons from the Agreement Lifecycle Actions panel. For more information, see Enabling and Customizing the Action Panel.

Fields

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

Field Label	Description	Data Type	Required	Default Value	Reserved
Account	The link to the account record to identify the external party to this agreement.	Lookup(Account)	Yes		Yes
Activated By	Auto populated with the user who activates the agreement in the system. Read-only.		Lookup(user)		
Activated Date	Auto populated with the date on which the agreement was activated in the system. Read-only.	Date			
Agreement Category	Used to categorize agreement types. This can be agreement type specific (add appropriate values for each agreement type) and can also be used for template filtering.	Picklist			
Agreement End Date	The end date for an agreement. A required field on activation, if the agreement is not perpetual.	Date	Yes		Yes

Field Label	Description	Data Type	Required	Default Value	Reserved
Agreement Name	Unique identifier for the agreement record. This name appears in page layouts, related lists, lookup dialogs, search results, and key lists on tab home pages. By default, this field is added to the custom object page layout as a required field.	Text(80)	Yes		Yes
Agreement Number	The system assigned unique agreement number. Identifies the agreement number, including the version number. Use this field to display on screens, reports, dashboards, search filters and columns, and more.	Auto Number	Yes		Yes. Not changeable by user.
Agreement Start Date	The effective date of the agreement. A required field on activation.	Date	Yes		Yes
Amendment Effective Date	The date from which the amendment is effective. If set during agreement creation, this field is auto-populated in the amended agreement.	Date			
Auto Renew	Indicates whether the agreement will auto renew.	Check box			

Field Label	Description	Data Type	Required	Default Value	Reserved
Auto Renewal Terms	Specifies any terms associated with auto renewal.	Long Text Area (32000)			
Business Hours	Corporate Business Hours associated with the agreement; used for cycle time reporting.	Lookup(Business Hours)			
Company Signed By	Link to contact record to identify internal signatory.	Lookup(Contact)	Yes		
Company Signed Date	Date when internal signatory signed.	Date	Yes		
Company Signed Title	Title of person signing on the behalf of Company.	Text(80)			
Contract Duration (Days)	The duration from Start Date to End Date in days. Shown when agreement is 'In Effect'.	Formula(number)	Yes		
Contracted Days	Days from Contract Start Date to Current Date if the contract is In Effect and Start Date is set.	Formula(number)	Yes		
Created By	User who created the record	Lookup(User)	Yes – System assigned		Yes
Description	Detailed description of an agreement.	Long Text Area(32000)	Yes		

Field Label	Description	Data Type	Required	Default Value	Reserved
Executed Copy Mailed Out Date	Date on which the final, executed copy was mailed out to the external party.	Date			
Executed Date	This is a date field that is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all the recipients. A user can manually enter the date when the document has wet signatures and when the signed document is uploaded manually.	Date			
Initiation Type	To indicate whether this record is being filed as an executed agreement or is being negotiated in the system.	Picklist	Yes - System assigned	Negotiate Contract	Yes. Not changeable by user.
Internal Renewal Notification Days	Notification period prior to Renewal Notice Date when notification is sent out internally to indicate that renewal is approaching. Email alert needs to be setup, if needed.	Number	Yes		

Field Label	Description	Data Type	Required	Default Value	Reserved
Internal Renewal Start Date	Auto populated with Date by which internal notice of internal renewal is approaching. It is calculated as Issue Renewal Notice Date minus Internal Renewal Notification days.	Date	Yes – System assigned, changeable by user		
Last Modified By	User who most recently changed the record	Lookup(User)	Yes – System assigned		Yes
Non Standard Legal Language?	To indicate whether this agreement contains non-standard language.	Checkbox			
Other Party Returned Date	The date on which other party returned the signed agreement.	Date			
Other Party Sent Date	Auto populated with the Date on which agreement was first sent to other parties for review or signatures.	Date			
Other Party Signed By	Link to contact record to identify external signatory.	Lookup(Contact)			
Other Party Signed By (Unlisted)	External signatory identifier (when signatory is not maintained as contact (record) in the system).	Text Area			

Field Label	Description	Data Type	Required	Default Value	Reserved
Other Party Signed Date	Date when external signatory signed.	Date			
Other Party Signed Title	Title of person signing on behalf of Other Party.	Text			
Outstanding Days	Shows the number of days between date agreement was today, if not returned. Else number of days between returned and sent.	Formula(number)			
Owner	Assigned owner of the agreement record	Lookup(User)	Yes – System assigned, changeable by user	Login User	Yes
Owner Expiration Notice	To indicate the number of days prior to the expiration date that a notification needs to be sent to the owner.	Picklist		90 Days	
Parent Agreement	Reference to the parent agreement if the current agreement was created as a child or assigned manually.	Lookup(Agreement)			
Perpetual	Identifies whether the agreement has a specified end date or if it is open-ended.	Checkbox			

Field Label	Description	Data Type	Required	Default Value	Reserved
Primary Contact	Primary external contact for the agreement.	Lookup(Contact)			
Record Type	The agreement type for this record	Record Type	Yes	Agreement Type from selection screen	Yes
Related Opportunity	Identifies the opportunity related to the agreement.	Lookup(Opportunity)			
Remaining Contracted Days	If the agreement is In Effect, this value is calculated as Contract Duration Days less Contracted Days.	Formula(number)			
Renewal Consent	Indicates whether consent is required to extend or renew the agreement.	Checkbox			
Renewal Notice Date	It is calculated as Agreement End Date less Renewal Notice Days.	Formula(Date)			
Renewal Notice Days	The number of days before Agreement End Date when renewal notice is due.	Number			
Renewal Term (Months)	The number of months to extend the agreement.	Number			

Field Label	Description	Data Type	Required	Default Value	Reserved
Renewal Terms	Specifies any terms for renewal.	Text Area			
Request Date	The date when the agreement was requested.	Date			
Requestor	Agreement Requestor (user).	Lookup(user)			
Risk Rating	This field allows users to track agreement risk rating.	Number(5, 2)			
Source	Specifies the source of the agreement—Internal Paper or Other Party Paper.	Picklist		Internal Paper	Yes. Not changeable by user.
Special Terms	Identifies any special terms related to the agreement.	Text Area			

Field Label	Description	Data Type	Required	Default Value	Reserved
Status	The sub stage of an agreement—the status underneath a given status category. These are generally modifiable by the customer except for the following values which are reserved to manage agreement life cycles: Request, Submitted Request, Cancelled Request, In Amendment, Being Amended, Superseded, Activated, Expired, Internal Signatures, Author Contract, Expired, Terminated, Ready for Signatures, Fully Signed, Signature Declined.	Picklist			
Status Category	The higher level state of the agreement-In Authoring, In Effect, Expired, and more. These are reserved values.	Picklist		Request	Yes. Not changeable by user.
Subtype	The subtype of the agreement for a given agreement type. The user specifies the values based on their agreement types.	Picklist (Default)			

Field Label	Description	Data Type	Required	Default Value	Reserved
Term (Months)	Identifies the term of an agreement, in months, from the Agreement Start Date.	Number			
Termination Comments	Comments for the termination of an agreement.	Long Text Area(32000)			
Termination Date	Date when the agreement was terminated.	Date			
Termination Notice Days	Notice period, in days, prior to the termination of agreement.	Number			
Termination Notice Issue Date	Date when the termination notice for an agreement was sent or received.	Date			
Total Agreement Value	Total value of an agreement.	Currency (16, 2)			
Version	The version number of the agreement that is incremented each time an agreement is amended.	Number (3,0)	Yes – System Assigned		Yes

Status and Status Categories

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

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

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

2. **In Authoring**:
   This Status Category indicates that the contract is in the Authoring stage.

Stage	Description
Author Contract	Contract being authored
Language Approval	Language being approved
Submitted Request	Request submitted
Approved Request	Request approved
In Amendment	Contract being amended
In Clause Approval	Clauses are being approved ⓘ Clause approval is triggered from Online Contract Collaboration. For more information, see Working with Clause Approvals.

3. **In Signatures**:
   This Status Category indicates that the contract is in the Signatures stage.

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

4. **In Filing**:
   This Status Category indicates that the contract is in the Filing stage.

Stage	Description
In Reconciliation	Terms are being reconciled
Reconciled	Terms reconciliation completed

5. **In Effect**:
   This Status Category indicates that the contract is in the Effect stage.

Stage	Description
Activated	Active Contract
Being Activated	Contract is in the activation process
Being Amended	Contract is in the amendment process
Being Renewed	Contract is in the renewal process
Superseded	Contract is amended
Being Terminated	Contract is in the termination process

6. **Expired**:
   This Status Category indicates that the contract is in the Expired stage.

Stage	Description
Expired	Contract expired

7. **Terminated**:
   This Status Category indicates that the contract is in the Terminated stage.

Stage	Description
Terminated	Contract terminated

8. **Amended**:
   This Status Category indicates that the contract is in the Amended stage.

Stage	Description
Superseded	Contract superseded

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

Stage	Description
Cancelled Request	Contract request cancelled

Use Case for Creating an Agreement

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

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

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

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

Pre-requisite: Make sure you have the following:

- An account for the company ABC is created.

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

To create a perpetual agreement, perform the following steps:

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

Result:

The perpetual agreement is created.

Next Step:

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

Generating an Agreement

You can generate an agreement document using an existing template. If a template is long and complicated, with many clause references and conditional statements, it may take a while to generate the document. In such cases, you can submit the request to generate an agreement document and you will receive an email notification after the document is generated. Templates can be created using X-Author for Contracts. For each agreement record type, a different template can be created in Microsoft Word. For more information on using X-Author for Contracts to create a template, see X-Author for Contracts documentation.

Prerequisites

- You must have an existing agreement record.
- Ensure that there are less than 55k characters in the clause template.
- To generate a PDF as an ISO-standardized version, you must configure PDF/A as an output format. For more information, see Configuring PDF/A as a Document Output Format.
- You must have a template ready for the record type of your agreement.

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

To generate an agreement document

1. Navigate to the **Agreements tab** and select an existing agreement record.
2. Click **Generate** to generate an Agreement document.
3. You will be navigated to the Template selection page. From the Options section, select one of the following output formats for your agreement record:
   a. **DOC or DOCX**: To generate a Microsoft Word document.
   b. **RTF**: To generate an agreement document in Rich Text Format.
   c. **PDF**: To generate a protected PDF agreement document.
   d. **PDF/A**: To generate a PDF as an ISO-standardized version.
4. From the Document Permission dropdown, select one of the following document protection options for the generated document:
   a. **Full access**: To allow users to read and write. This option is selected by default.
   b. **Insert comments and tracked changes only**: To allow users to insert comments. All the changes made by any user are tracked.
   c. **Insert comments only**: To allow users to insert comments.
   d. **Fill in form fields only**: To allow users to fill in the form fields.
   e. **Read only**: To allow read-only access to users.
5. To include a watermark across your agreement document, select the **Include Watermark** checkbox.

6. From the Templates section, select the template to generate your agreement document. The first template in the list is selected by default. If only one template is available for a record type or only one template is available based on query template filter then that template is selected by default.

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

7. Click **Generate** or **Submit** according to your requirement.
    After the document is generated, the Document Generated window is displayed. If you had selected Submit, you must stay signed into CLM and you will receive an email after the document is generated.

8. Click the **Click here to view your file** link to download your document or click **OK** to return to the agreement detail page.

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

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

Sending an Agreement Document for Review

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

Prerequisites

- You must have an existing generated Agreement document.
- You must ensure that the Status Category for the Agreement record is In Authoring or In Signatures.

- You must ensure that Track Changes is enabled on the agreement document that you send to the customer for review.

Limitation

- You cannot send a document with protection for review if your organization has set up High-Assurance Session Security at a user profile level. As a result of the security, the sessions cannot be generated in asynchronous calls.
- After you send an agreement document for review, the activity history does not record details for any of the attachments.

To send an agreement document for review

1. On the Agreement detail page, click the **Send for Review** button.
2. Select documents to send for review and click **Next**.
3. *(Optional)* Select either or both Related Agreements and Child Agreements checkboxes to view documents relating to selected agreement types.

> ⓘ You can see the Choose Related Document(s) page if the current agreement has related or child records. If there are both child and related documents, you can either select Related Agreements or Child Agreements checkbox to filter according to your requirement. You can view Related, Sibling, Parent, or Child agreement documents according to the *Filter By The Primary Agreement Status* comply system property. For more information, see Comply System Properties.

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

> ⓘ **Important Notes on Email Template Selection**
>
> - If you are using Lightning, you can see the email template folder dropdown. You can select an email template from the selected folder.
> - A default email template is usually configured by your administrator (using an Admin property - APTS_EmailTemplateForReview) for the Send for Review action. Check with your administrator if you are unsure. For more information, see Admin Entries.
> - If no Email Template is selected and no default email template has been configured (using APTS_EmailTemplateForReview), the Email Template "Email Template For Review Signature" is used. In most cases,

this template not configured as "Available for Use" and must be manually set to true or an error will occur. In the case of a new installation of the package (non-upgrade), this Email Template is automatically configured as "Available for Use."

- You cannot return to this page after you click Next. If you decide you want to use a different email template after this point, you will have to cancel the Send for Review and start over from the agreement record.

5. *(Optional)* Select a document edit permission to be applied to any documents selected in previous steps.

> ⓘ You can see the Set Document Permissions page if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see Configuring Agreement Document Protection.

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

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

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

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

> When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.

8. *(Optional)* Update the email **Subject** and **Body**.
9. *(Optional)* If you need to add any supporting document from your local drive:
    a. In the Attached Documents section, click **Add More**.
    b. Drag and drop or upload documents from your local drive.
    c. On the Upload Files popup, click **Done** after the documents are uploaded.
    d. Click **Add**.
10. Click **Send**.

    The activity is logged in the Activity History. The Status Category changes to In Authoring and the Status changes to Other Party Review for your agreement record.

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

    According to the Email Attachments configuration, when you send documents for review, recipients can view the documents as links or HTML attachments. For more information, see Salesforce Documentation.

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

Tracking X-Author Reviews

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

Sending for Review in X-Author Contracts

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

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

Tracking Reviews on the Agreement Record

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

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

Example: Version Aware Agreement Document

1. Prior to Send for Review, the Merge Event-related list might display the merge events already taken on the agreement.
2. Next, you initiate a review of the main agreement document from X-Author Contracts, sending it to 2 recipients. After sending, you refresh the agreement record and view the Merge Event list.
3. You can track status for all Review Cycles by clicking on the Review event link. The Merge Event Detail screen is displayed.
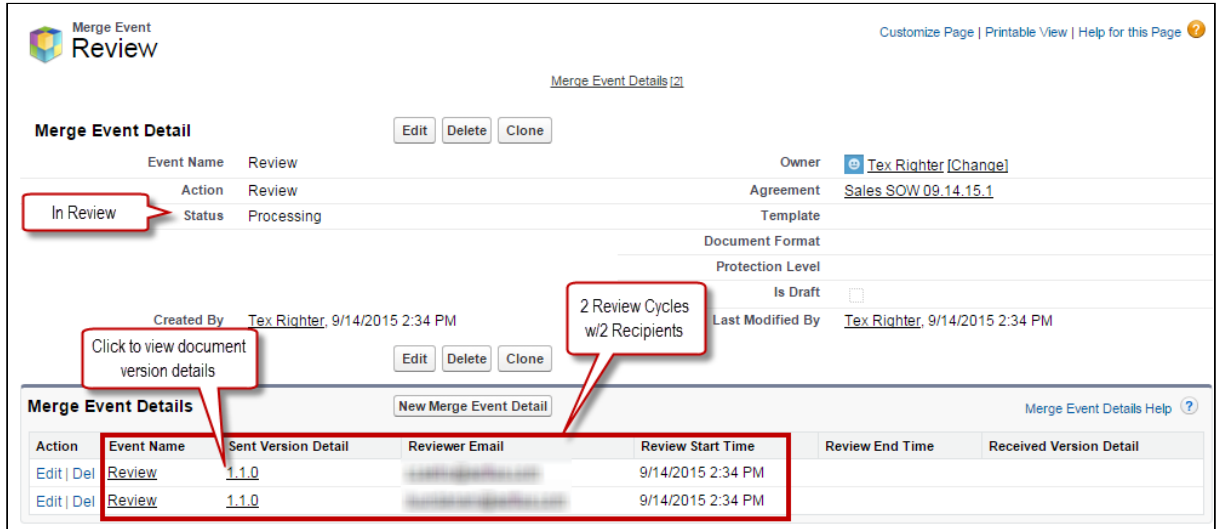
The Merge Event Detail page displays information about the Review. Status indicates it is currently in progress. The Merge Event Details list contains a separate record for each individual review cycle (a unique combination of recipient and document). Each review cycle displays the Reviewer Email and the Review Start Time.

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

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

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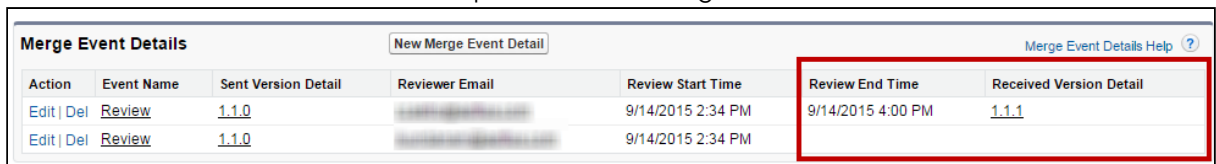
7. You can choose to close all remaining cycles at the next document check-in, rather than check the document in on behalf of the second reviewer. This creates a new Negotiator (minor) version of the document. The Merge Events related list is updated to reflect the Review as complete now that all review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

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

Sending an Agreement Document for Parallel Review

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

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

When you navigate to the Review Cycle page, you can see all the review cycles for a document on the left panel and the latest review cycle details on the right panel. You can click any Review Cycle name on the left panel to view the review cycle details.

To use parallel review, you must send documents in the DOCX format with the Document Type as Agreement Document. The following conditions apply when you send documents for parallel review:

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

You can send related agreement documents according to the administrator configurations and the parallel review does not impact the status and status category of related agreements.

This feature spans X-Author Contracts and CLM. For more information, see Send for Parallel Review using X-Author Contracts.

Prerequisites

- Your administrator must have configured the settings mentioned in Prerequisites for Parallel Review.
- You must have a generated agreement document.
- You must ensure that the Status Category of the Agreement is In Authoring or In Signatures.
- You can only send DOCX documents for parallel review.
- You can view the **Upload Reviewed Document** button after you send a document for parallel review.
- You must disable Clickjack Protection if you are using Salesforce Lightning. For more information, see Disabling Clickjack Protection.

Restrictions

- If the reviewed document is less than 25 MB, you can reply to the review email by attaching reviewed documents. If the reviewed document exceeds 25 MB, you can share the document with the contract owner. The contract owner can upload the reviewed document and end the review. For information on supported file sizes, see Supported File Sizes in Lightning and Supported File Sizes in Classic.
- If you select related or child agreement documents for parallel review and the *Parallel Review for related agreements* comply system property is disabled, documents are considered as supporting documents. You must not reply to the review email with related or child agreement documents after review. You can reply to the review email with the reviewed document that has your email address in the file name.
- When you reply to an email with comments or add comments while ending a review, you can add only 32k characters.
- When you track the review status from X-Author Contracts, the buttons on the Review Cycle page are disabled.

To send an agreement document for review

1. On the Agreement detail page, click the **Send For Review** button from the Additional Actions section.

The Select Documents page is displayed. You can view the latest version of the agreement documents. You can sort the columns to view ascending or descending order of data in a column.

2. From the Agreement Documents section, select the agreement documents in DOCX format that you need to send for review. From the Related Agreement Documents section, select the agreement documents in DOCX format that you need to send for review.

3. *(Optional)* You can use the agreement documents search box to search for agreement documents with the document name. You can use the related documents search box to search for related documents with the document name, agreement name, or agreement relationship.

> ⓘ If the agreement has any related or child agreement documents, you can view the Related Agreement Documents section and select related or child agreement documents in any format that you need to send for review. But only documents in DOCX format are considered for parallel review. You can click the Show filters icon (▼) to filter Related, Sibling, Parent, or Child agreement documents.

4. (*Optional*) To add, remove, or reorder columns:
   a. Click the settings icon (⚙) to configure the fields to view the Select Fields to Display popup.
   b. To add a new column, select a field from the Available Fields and click the ▶ icon to move the field to Visible Fields.
   c. To remove a column, select a field from the Visible Fields and click the ◀ icon to move the field to Available Fields.
   d. To reorder the columns, click ▼ or ▲ .
   e. Click **Save**.

5. After you select a document, the Next button is enabled. Click **Next** to proceed to the next step.

6. In the Email Detail section, enter contacts or recipient email addresses.

> ⓘ At least one contact must be available in your org. You can add a maximum of 150 recipients.
> When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.

7. (*Optional*) If you need to update the email subject, you can enter the new subject in the Subject field.

8. (*Optional*) If you need to change the email template, click the Select another email template hyperlink to change the email template. In the Select Email Template

popup, select an email template folder from the dropdown and then select an email template. Click **Save**.

> ⓘ The default email template is based on the value set for *APTS_EmailTemplateForReview* or *APTS_EmailTemplateForReviewSignatur es* admin entry. If the admin entries are not configured, the default email template is set to the template provided by Conga. The default email template folder is based on the value set for the *APTS_DefaultEmailTemplateFolder* admin entry.
> When the *APTS_SkipEmailTemplateSelection* admin entry is set to true, you cannot see the Select another email template hyperlink to change the email template. Default Template will be selected. For information on admin entries, see Admin Entries.
> The *APTS_EnableValidationForEmailWithoutUserContact* admin entry is not applicable in Lightning, the admin entry is still applicable in Classic.

9. In the Permission Setting section, you can select one of the following document protection levels from the Document Permission dropdown.
    - **Full access**: To allow users to read and write. This option is selected by default.
    - **Insert comments and tracked changes only**: To allow reviewers to insert comments. All the changes made by the reviewer are tracked.
    - **Insert comments only**: To allow reviewers to insert comments.
    - **Fill in form fields only**: To allow reviewers to fill in the form fields.
    - **Read only**: To allow read-only access to reviewers.
    - **Ignore**: To inherit document protection used while generating documents.

    > ⓘ To view Permission Setting, you need to configure agreement protection. For more information, see Configuring Agreement Document Protection. When you select any of the document protection options except Ignore, the document protection selected while sending for review is given priority irrespective of the document protection applied while generating the document.

10. *(Optional)* If you need to add any supporting documents from your local drive:
    a. In the Attached Documents section, click **Add More**.
    b. Drag and drop or upload documents from your local drive.
    c. On the Upload Files popup, click **Done** after the documents are uploaded.
    d. Click **Add**.

> ⓘ If the comply user property is not configured then you can view the add more button by default.

11. *(Optional)* If you need to remove an uploaded document, click the remove icon (✖) beside the document name. The remove icon is not available for agreement documents If you need to remove agreement or related documents, click **Previous** and unselect the required documents.

> ⓘ You can only remove uploaded supporting documents from the Attached Documents section. No review cycle or document protection is added for the uploaded supporting documents.

12. Click **Send**.

The Status Category changes to In Authoring and the Status changes to Other Party Review for your agreement record.

> ⓘ If the toggle **Set field and clause permission** is on, you will see the **Next** button instead of **Send**. You can toggle **Set field and clause permission** off if you do not want to set field and clause permissions.
> When you select PDF or documents of type Agreement Document for review or the **Enable document permissions for review** comply system property is disabled, you cannot see the **Set field and clause permission** toggle.

13. Click **Next** to view the Set Document Permission page.
14. Click **Add** beside Recipients to add additional recipients and enter an email address, contact, or user.
15. Select or unselect field permissions and click the **Clauses** tab to select or unselect clause permissions.
16. *(Optional)* If you are sending multiple documents for review, select a document from the agreement name dropdown and repeat steps 13 to 14 to set permissions.

> ⓘ By default, all documents have Full Access permission. When you switch between documents, the permissions are retained.

17. Click **Send**.

The Status Category changes to In Authoring and the Status changes to Other Party Review for your agreement record.

To view the review cycle of an agreement

1. Navigate to the Agreement detail page of an agreement sent for parallel review to view the review cycle details in the Review Status section.
2. Click the refresh icon (⟳) to refresh the review status.
3. Select the document dropdown to view the review status of the selected document.
4. Click the **Review Cycle Details** hyperlink to navigate to the Review Cycle page.

(or)

1. Go to the Document Versions section or the Documents tab.
2. In the Review Status column, click the **In Progress** link to open the Review Cycle page.

> ⓘ **Note**
>
> The Review Status column displays the *Not Started* link till the notification emails are sent to all the recipients. Click the **Not Started** link to navigate to the Review Cycle page and click the **Refresh** button to refresh the review status.

To view the review cycle of a document

1. Navigate to the Review Cycle page.
2. In the left panel from the document dropdown, you can select the latest version of the document if you had sent multiple documents for parallel review.

To add additional reviewers to the review cycle

1. Navigate to the Review Cycle page.
2. Click **Add Reviewer**. This opens the Email Edit page.

   > ⓘ The Add Reviewer button is not enabled for the review cycles in Completed or Canceled status.

3. Enter *Contact* or *User or Email* details.
4. Click **Send**. An email notification is sent to the reviewer.

To end a review in a review cycle

1. Navigate to the Review Cycle page.

2. For a reviewer, click ▼ and select **End Review**.
   This opens the End Review window.

   > ⓘ When you select the header checkbox to select all the reviewers in the review cycle, all the reviewers that have In Progress status are selected. The reviewers in other statuses are not selected.

3. (*Optional*) Click **End Review** to end the review without uploading the reviewed document. A message is displayed and you will receive a notification upon completion.
   An email notification is sent to the reviewer that the review was ended without uploading the reviewed document.

4. You can either click **Upload Files** or drag and drop your file.
   This displays the Upload Files popup. You can upload only one file at a time. If you select a document unrelated to the current review cycle, an error is displayed.

5. Add a comment (*optional*).

6. Click **End Review**. A message is displayed—your request to end the review is being processed and you will be notified upon completion.

7. Click **Ok**. The review status changes to *Completed* for the reviewer on the Review Cycle page.
   You must end review for each document individually. After the end review request is processed, the checkbox, End Review, and Cancel Review are not visible for that reviewer. The reviewed document is merged with the latest version of the document. When you end the review for all the reviewers, the review cycle status changes from *In Progress* to *Completed*. If two or more reviewers have reviewed the same field or content, the review of the last reviewer is considered as final.

   > ⓘ If a document review fails while merging the reviewed document with the latest document, you receive an email notification regarding the failed review. You can retry the review up to three times. If the review fails again, you can cancel the review and initiate a new review. For more information, see Retry Review.

To upload a reviewed document from the Agreement Detail page

1. Navigate to the Agreement Detail page.
2. In the Agreement Action Panel, click **Upload Reviewed Document** to view the Upload Reviewed Document page.

3. Click **Upload Files** to upload the reviewed document from your local drive or drag and drop your files to open the Upload Files popup.

> ⓘ You can upload only one reviewed document.

4. (*Optional*) Add a comment in the Comments column.
5. (*Optional*) If you upload an incorrect document, click the delete icon (⊗) to remove the uploaded document.
6. Click **End Review**. The document review status changes to Completed.

To submit reviewed documents via email

Prerequisite: You must configure the email service and admin entry to submit a reviewed document via email. For more information, see Configuring Email Service for Ending Parallel Review by Email.

1. Open the email containing review documents.
2. Download documents and make the required changes.
3. Reply to the review email by attaching reviewed documents and adding your comments in the email body.

> ⓘ **Conga recommends replying to the review email with a single attachment if the file size is more than 10 MB.**
> You can reply to the review email with a single document or multiple documents. When you reply to the review email, make sure that the combined file size of reviewed documents is not more than 25 MB. The review cycle does not end if the file size of reviewed documents exceeds 25 MB or more than three reviewers send 25 MB reviewed documents simultaneously. Reviewers can encounter errors when the file size of reviewed documents exceeds 25 MB and more than 2 reviewers are in the review cycle.
> If you do not reply to the review email with a document that belongs to the current review cycle, you receive an email notification to attach a valid document.
> When you reply to the email with the reviewed document and the document processing takes time, the review cycle status is updated to **Merge In Progress**. If other reviewers also reply to the email at the same time and a document is already being processed, the review cycle status of the remaining documents is updated to **In Merge Queue**.

> Documents that are in the review are locked and are not available for sending for review and activation.

4. To verify if the review has ended for you:
   a. Navigate to the Review Cycle page of the agreement that you have reviewed.
   b. You can see that the Review Status is *Completed* and the Comments column has your review comments.
   c. Activity log has a new entry that the review was ended.

To cancel a review in a review cycle

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

1. Navigate to the Review Cycle page.
2. Select a reviewer or multiple reviewers and click the **Cancel Review** button in the header.
   (Or) For a reviewer, click ⏷ and select **Cancel Review**.
   This opens the Cancel Review window.

   > ⓘ When you select the header checkbox to select all the reviewers in the review cycle, all the reviewers that have In Progress status are selected. The reviewers in other statuses are not selected.

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

To retry review in a review cycle

Prerequisite: When merge document fails due to any issue during a parallel review.

1. Navigate to the Review Cycle page.
2. For a reviewer, click ⏷ and select **Retry**.

CLM

Sending an Agreement Document for Microsoft Teams Review

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

Prerequisites

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

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

To send an agreement document for review

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

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

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

   > ⓘ **Note**
   >
   > This page is shown only if Agreement Document Protection rules for "Send to Other Party for Review" are specified and properties for document protection are enabled. For more information, see Use Case for Setting Up Agreement Document Protection and Admin Entries.

4. In the Reviewers field, enter the name or email id of a reviewer from your organization in the search bar and click the search icon (🔍). After the search results are displayed, click the add icon (👥) to add the reviewer.
   The newly added reviewer is displayed in the Added Reviewers section.

5. After adding all the reviewers, click **Send**.
   This displays a popup message that your document is being processed. After processing, a new MS Team is created. If multiple documents are sent for review, then multiple teams are created. The name of the team is according to the Team Name Format defined in MS Teams custom setting. For more information, see Configuring MS Teams Setting.

6. Click **Ok** on the popup message.
   This opens the Agreement Detail page.

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

To review a document in MS Teams

1. Open MS Teams application.
2. On the left side of Teams, click **Teams**.
3. Type the agreement name in the search box at the top right and press Enter.
4. Expand the team to see the channels in the team.
5. Click **ReviewCycle_<date>**.
   The channel name is according to the Channel Name Format in MS Teams' custom setting. For more information, see Configuring MS Teams Setting.
6. Click the **Files** tab.
7. Click More options (☐) next to the file name.

8. Select an edit option according to your requirements. For more information, see *Microsoft Teams documentation*.
   After you end the review in Contract Management, the reviewed document is available on the Document Version Detail page.

To view the review cycle of an agreement

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

To add additional reviewers to the review cycle

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

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

To end review on the review cycle page

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

6. To view the reviewed document, navigate to the Document Version Detail page.

To cancel review on the review cycle page

Prerequisite: The review cycle should be In Progress status.

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

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

Microsoft Teams Dataflow Diagram

The following diagram shows the dataflow between CLM and Microsoft Teams.
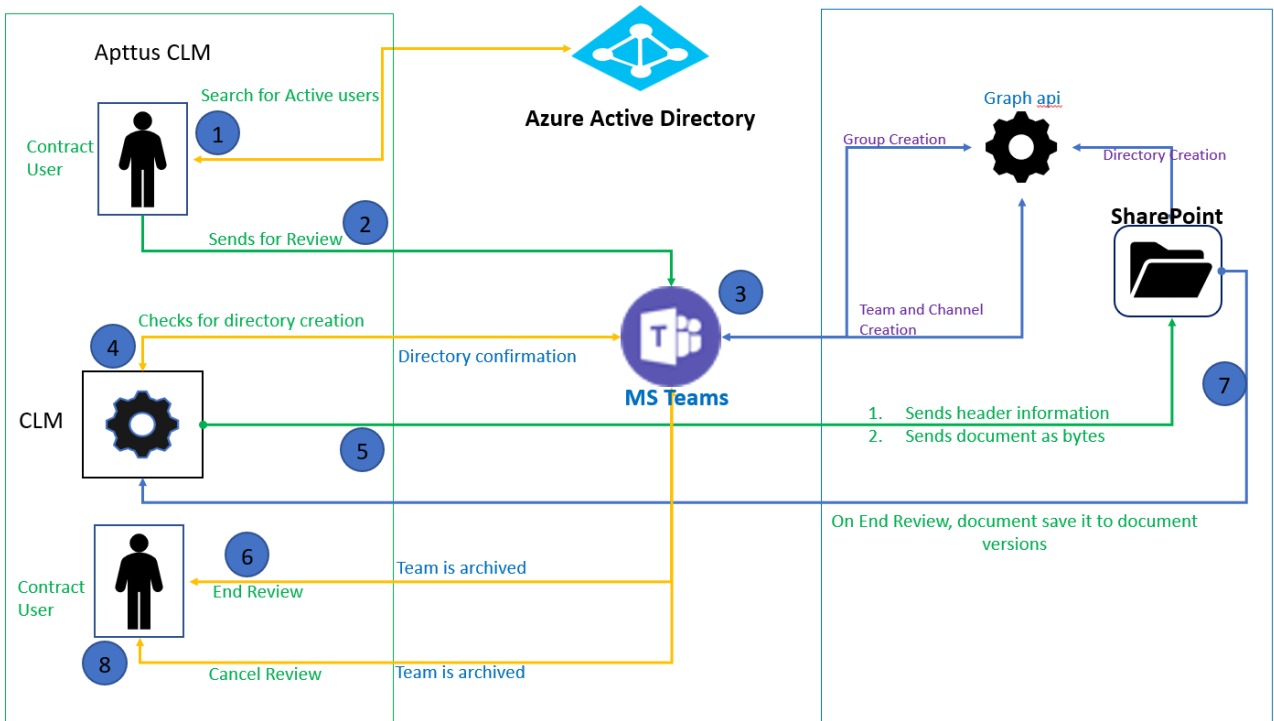
Sending an Agreement Document for Collaborative Review Using Office 365 Review

You can send the agreement documents to Office 365 for collaborative review in the Salesforce Lightning mode. In Office 365, you can collaboratively edit and review an agreement document with all the team members and view live changes. A review cycle is created when you send an agreement document in DOCX format for Office 365 review. All documents part of the Office 365 review has track changes turned on.

You can send agreement documents for review to stakeholders in and out of your organization. You can create one review cycle for internal stakeholders for internal and one for external stakeholders. You can also create a review cycle for mixed review that consists of both internal and external reviewers. On the review cycle page, you can differentiate the internal, external, and mixed reviews with the tags (O365 Internal Review, O365 External Review, and Office 365 Review).

Points to be considered before sending documents for mixed review:

- Review document shared with internal reviewers have full access mode with Track Changes on.
- The content control is removed from the document when the review is in progress.
- Reviewers cannot checkout the document in X-Author while the review is in progress.
- Reviewers can use MS Word to share the document with other users.
- Document review links shared with internal and external users are different.
- **Limitations**
    - External users cannot download the review document.
    - External users cannot share the document with other internal/external users.
    - External reviewers cannot accept or reject the changes in the document.

Prerequisites

- You have a Microsoft Office 365 subscription.
- You have configured Office 365 settings to send an agreement document for review. For more information, see Configuring Office 365.

- You can view the Office 365 Internal Review, Office 365 External Review, and Send for Office 365 Review buttons based on the configuration of your administrator. For more information, see Enabling and Customizing the Action Panel.
- You can only send agreement documents that are version-aware and are in DOCX format for review.
- Ensure the status category for the Agreement record is In Authoring or In Signatures.
- For O365 external review, administrators must allow external sharing to "Anyone" or "New and existing guests" in Microsoft 365 setup. For more information, see Microsoft Documentation.

Restrictions

- You must not upload a document reviewed in a word processor other than MS Word.
- External reviewers cannot accept or reject changes in the review document. If the reviewers open the Office 365 review documents on the desktop, the reviewers can see that the Accept and Reject options are disabled in the Review tab.

To send an agreement document for review

1. On the Agreement detail page, click one of the following;
   a. **Office 365 Internal Review** to send documents for internal review
   b. **Office 365 External Review** to send documents for external review.
   c. **Send for Office 365 Review** to send documents for mixed review (internal and external review).

   > ⓘ When Permit Delegation is enabled, you can see the Microsoft Sign-in page. When Permit Delegation is disabled, you can see the Select Document(s) page. For more information, see Configuring Office 365.

2. Select DOCX agreement documents for review from the Agreement Documents section or from the Related Agreement Documents section.
3. *(Optional)* You can use the agreement documents search box to search for agreement documents by document name. You can use the related documents search box to search for related documents by document name, agreement name, or agreement relationship.
   Suppose the agreement has any related or child agreement documents. In that case, you can view the Related Agreement Documents section and select related or child agreement documents in any format you need to send for review. Only documents in DOCX format are considered for collaboration review. You can click the show filter icon (▼) to filter related, sibling, parent, or child agreement documents.

4. (*Optional*) To add, remove, or reorder columns:
   a. Click the settings icon (⚙) to configure the fields to view the Select Fields to Display popup.
   b. To add a new column, select a field from the Available Fields and click the right arrow (▶) icon to move the field to Visible Fields.
   c. To remove a column, select a field from the Visible Fields and click the left arrow (◀) icon to move the field to Available Fields.
   d. To reorder the columns, click the down arrow (▼) or the up arrow (▲).
   e. Click **Save**.
5. Selecting a document enables the Next button. Click **Next**.
6. In the Email Detail section, enter contacts or recipient email addresses.

> ⓘ For internal review, you can only add users from the active directory. For external users, you can select external email, users, or contacts.
> When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.

7. (*Optional*) To update the email subject, you can enter the new subject in the Subject field.

> ⓘ If the default internal and external review email templates (Agreement Office365 Internal Review Notification and Agreement Office365 External Review Notification) are deleted, the email templates are available based on the value set for the APTS_EmailTemplateForReview admin entry. If the admin entries are not configured, the default email template is set to the template provided by Conga. The default email template folder is based on the value set for the APTS_DefaultEmailTemplateFolder admin entry.

8. (*Optional*) To add any supporting document from your local drive:
   a. In the Attached Documents section, click **Add More**.
   b. Drag and drop or upload documents from your local drive.
   c. On the Upload Files popup, click **Done** after the documents are uploaded.
   d. Click **Add**.

> ⓘ If the Show Add More Button During Review comply user property is not configured then you can view the "Add more" button by default. For more information, see Comply User Properties.

9. (*Optional*) To remove an uploaded document, click the remove icon (✖) beside the document name. The remove icon is not available for agreement documents. If you

need to remove the agreement or related documents, click **Previous** and unselect the required documents.

> ⓘ You can only remove uploaded supporting documents from the Attached Documents section. No review cycle or document protection is added for the uploaded supporting documents.

10. Click **Send**.

    The status category changes to In Authoring and the status changes to Other Party Review for your agreement record. All reviewers receive an email with the document link.

To review a document

1. Open your email and click the document link.
2. Log in to your Microsoft account.

   The document opens in Insert Comments and Track Changes protection mode.

   > ⓘ When you open an internal review document, click **Edit Document** when you open the document. To edit the internal review document, open the document using desktop MS Word. If you have X-Author for Contracts license, you can make changes in the document using X-Author for Contracts. For more information, see Internal Review using Office 365.

3. Make the required changes and close the document.

   After you end the review in Contract Management, the reviewed document is available on the Document Version Detail page.

To view the review cycle of an agreement

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

To add additional reviewers to the review cycle

1. Navigate to the Review Cycle page.
2. Click **Add Reviewer**. The Add Reviewer popup opens.

> ⓘ The Add Reviewer button is not enabled for the review cycles in Completed or Canceled status.

3. Enter *Contact* or *User or Email* details in the To field.
4. Click **Add Reviewer**. An email notification containing a document link is sent to the reviewer.

To end review on the Review Cycle page

1. Navigate to the Review Cycle page.
2. Select a review cycle and click the **End Review** button.
   When you end the review, the review cycle status changes from In Progress to Completed. The document is archived and you cannot edit it. An email notification is sent to all the reviewers that the document review is complete. To view the reviewed document, navigate to the Document Version Detail page.

To cancel a review cycle

Prerequisite: The review cycle is In Progress status.

1. Navigate to the Review Cycle page.
2. Click the **Cancel Review** button in the header.
   The document is archived or deleted from the Office 365 shared location. On the Review Cycle page, the review status changes to Cancelled. An email notification is sent to all the reviewers that the review has been cancelled.

To cancel review in a review cycle

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

1. Navigate to the Review Cycle page.
2. For a reviewer, click ⏷ and select **Cancel Review**.
   The Cancel Review window opens.

> ⓘ When you select the header checkbox to select all the reviewers in the review cycle, all the reviewers that have In Progress status are selected. The reviewers in other statuses are not selected.

3. Add a comment (*optional*) and click **Cancel Review**.
   The review status for that reviewer changes to *Cancelled* and the reviewer receives a notification email regarding cancellation of the review. The canceled reviewer cannot open the document, but the contract owner can access the document. The review cycle status remains *In Progress* until all the reviews are completed or canceled. If one reviewer has completed the review but other reviews are Cancelled in that review cycle, the review cycle status changes to *Completed,* and the reviewed document is considered the final version.

Negotiating an Agreement Document

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

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

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

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

For more details refer to the X-Author Contracts documentation.

Prerequisite

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

To negotiate an agreement

1. Next to your Agreement document received from your customer in the Notes & Attachments related list, click **View**.
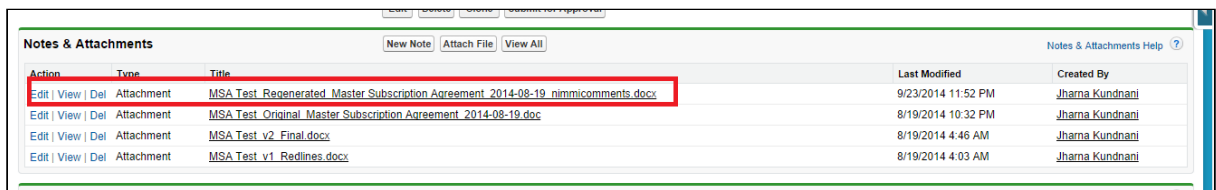
2. Open the Agreement document in Microsoft Word. If the document opens in Protected View, click **Enable Editing** to continue with the negotiation phase.
3. On the toolbar, click **X-Author Contracts**.
4. From the Access ribbon group, click Connect and login with your salesforce.com credentials.
5. Click **Check-Out** > **This document**.
6. Check your customer's redlined changes in the agreement document.
7. After finalizing the changes, from the Versions ribbon group, click **Check-In**.
8. Do one of the following actions from the **Save** drop-down list:
   - To save the agreement document with redlines in order to send it to the customer again, select With Redlines.
     X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Redlines*.
   - To save the agreement document without redlines, select Without Redlines. X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Clean*.
   - To save and override the changes of the agreement document and reflect them in the same document, select the Final - to be signed option and select the **Reconcile Document** checkbox.
   - To save the agreement document separately with new changes, select the Final - to be signed option. Use Compare to track the changes in the different versions of the agreement document.
     X-Author Contracts automatically renames the agreement document as *agreement document name_version number_Final*.

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

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

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

Finalizing an Agreement

After you complete the negotiation process with the customer, you can send the finalized agreement document to the customer for gathering signatures. When the agreement is ready to execute, you can collect the required internal and external signatures. Depending on your organization's requirements, you can send the agreement document for a manual signature to your customer. If a third-party application, such as Echosign or DocuSign is installed in your org, you can send the agreement document for an electronic signature. Once you receive the manually signed documents from the customer, you can upload the signed documents to finalize the agreement. Documents in the review are not available to send for signatures or eSignatures.

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

Prerequisites

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

Limitation

You cannot send a document with protection for signatures if your organization has set up High-Assurance Session Security at a user profile level. As a result of the security, the sessions cannot be generated in asynchronous calls.

To send an agreement for manual signatures

1. On the Agreement detail page, click the **Send for Signatures** button.
   The Select Documents page is displayed. You can view the latest version of the agreement documents. You can sort the columns to view ascending or descending order of data in a column.
2. From the Agreement Documents section, select agreement documents that you need to send for signatures. From the Related Agreement Documents section, select related agreement documents that you need to send for signatures.
3. *(Optional)* You can use the agreement documents search box to search for agreement documents with the document name. You can use the related documents search box to search for related documents with document name, agreement name, or agreement relationship.

   > ⓘ If the agreement has any related or child agreement documents, you can view the Related Agreement Documents section and select related or child agreement documents that you need to send for signatures. You can click the Show Filter icon (▼) to filter Related, Sibling, Parent, or Child agreement documents.

4. (*Optional*) To add, remove, or reorder columns:
   a. Click the settings icon (⚙) to configure the fields to view the Select Fields to Display popup.
   b. To add a new column, select a field from the Available Fields and click the ▶ icon to move the field to Visible Fields.
   c. To remove a column, select a field from the Visible Fields and click the ◀ icon to move the field to Available Fields.
   d. To reorder the columns, click ▼ or ▲ .
   e. Click **Save**.
5. After you select documents, the Next button is enabled. Click **Next** to proceed to the next step.
6. In the Email Detail section, enter contacts or recipient email addresses.

> ⓘ At least one contact must be available in your org. You can add a maximum of 150 recipients.
> When the APTS_IncludePrimaryContact admin entry is set to true, it adds the primary contact from the agreement to the To field of the email.

7. (*Optional*) If you need to update the email subject, you can enter the new subject in the Subject field.

8. (*Optional*) If you need to change the email template, click the Select another email template hyperlink to change the email template. In the Select Email Template popup, select an email template folder from the dropdown and then select an email template. Click **Save**.

> ⓘ The default email template is based on the value set for *APTS_EmailTemplateForReview* or *APTS_EmailTemplateForReviewSignatur es* admin entry. If the admin entries are not configured, the default email template is set to the template provided by Conga. The default email template folder is based on the value set for the *APTS_DefaultEmailTemplateFolder* admin entry.
> When the *APTS_SkipEmailTemplateSelection* admin entry is set to true, you cannot see the Select another email template hyperlink to change the email template. Default Template will be selected. For information on admin entries, see Admin Entries.
> The *APTS_EnableValidationForEmailWithoutUserContact* admin entry is not applicable in Lightning, the admin entry is still applicable in Classic.

9. *(Optional)* If you need to add any supporting document from your local drive:
   a. In the Attached Documents section, click **Add More**.
   b. Drag and drop or upload documents from your local drive.
   c. On the Upload Files popup, click **Done** after the documents are uploaded.
   d. Click **Add**.

10. *(Optional)* If you need to remove an uploaded document, click the remove icon (✖) beside the document name. The remove icon is not available for agreement documents If you need to remove agreement or related documents, click **Previous** and unselect the required documents.

> ⓘ You can only remove uploaded supporting documents from the Attached Documents section. No review cycle or document protection is added for the uploaded supporting documents.

11. Click **Send**.

The Status Category changes to *In Signature* and the Status changes to *Other Party Signature* for your agreement record.

After the agreement document is signed, all the clauses are marked as Final in the Agreement Clauses section. In the version aware agreement, the Document Type of the signed document is updated as the *Executed Document*. An executed document is a finalized version of an agreement that is ready for activation.

To Send an Agreement for Electronic Signature

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

From the Agreement detail page, click the **eSignature** button. This action takes you to the EchoSign or Docusign wizard. For more information on EchoSign, see Adobe Sign Services documentation. For more information on DocuSign, see DocuSign Services documentation.

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

- The Status Category changes to In Signatures and the Status changes to Other Party Signatures for your agreement record.
- The signed agreement documents are stored in the Document Version related list.
- All the agreement clauses are marked as Final.
- The Document Type is updated to Executed Document.

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

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

- You can send generated, regenerated, supporting, imported offline, created offline, or manually uploaded documents.
- You can select any document from Files or Notes and Attachments. You can also select the latest document version from the Document Version related list.
- The Document Type of the signed document is updated as the *Executed Document*.
- The intermediate signed documents from EchoSign are available in Contract Management as a major document version with the name Intermediate Signed

Document in the Document Version related list. In the version aware agreement, the Document Type of the document is updated to Intermediate Document.

Activating an Agreement

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

When you activate an agreement, the following documents are selected by default for activation:

- The latest Document Versions from Document Versions Detail.
- All the documents from Notes and Attachments and Files.
- All the executed documents.

When you unselect a document during activation:

- In version-aware agreements, the unselected documents along with their versions (if any) are deleted from the Document Versions Detail.
- In non-version-aware agreements, the unselected documents are deleted from *Notes & Attachments* and *Files*.

You can publish documents to different content repositories according to the *APTS_ContentRepositoryType* admin entry configuration. You can select or unselect documents on the agreement activation page according to the *APTS_ActivateDocumentsSelectAll and APTS_ActivateDocumentsSelectable* admin entries configuration. You can turn off the Publish toggle button according to the *APTS_ActivateDocumentsPublishAll* admin entry. For more information, see Configuring Activation Settings and Admin Entries.

Prerequisites

- You cannot activate an agreement if review cycles are In Progress.
- You must have an existing reviewed and signed agreement document.
- You must ensure that the agreement record's status category is In Signatures or In Filing.
- You can edit the classic activation email template. For more information, see Editing Classic Email Templates.

- The *APTS_AgreementDocumentActivateMaxFileSize* admin entry must be configured to upload documents of size more than 5 MB. For more information, see Admin Entries

Restrictions

- You cannot unselect executed documents during activation.
- When the combined size of documents exceeds 5 MB during activation and the *APTS_ContentRepositoryType* admin entry value is set to Document, you will encounter an error. If you need to activate an agreement with large files, ensure that the *APTS_ContentRepositoryType* admin entry value is set to none, content, or chatter.

To activate an agreement

1. On the Agreement detail page, from the Agreement Actions section, click **Activate**.
2. *(Optional)* By default, all the agreement documents are selected. Unselect the agreement documents that you do not need in the activated agreement. The Publish option is toggled off if you unselect a document and you cannot toggle it on. You can toggle the Publish option off for a document without unselecting the document if you do not want to publish the document.

   ⓘ You can use the **Publish All** toggle to turn on or turn off the publish toggle for all documents.

3. Click **Activate**.
   This displays the Activate Agreement popup.
4. *(Optional)* Turn on the **Notify others** toggle to notify other stakeholders. Enter the Users, Contact, or email addresses of the stakeholders in the To field.

   ⓘ You will receive an email after the agreement is activated irrespective of whether the Notify others toggle is on or off. The email subject and body are read-only fields, but your administrator can change the email template from the classic email templates. For more information, see Editing Classic Email Templates.

5. Click **Activate**.
   An email is sent to you after the agreement is activated. The Status Category changes to In Effect and the Status changes to Activated.

> ⓘ When the APTS_RestrictEmailToCurrentUserOnActivate admin entry is set to true, the agreement activation email notification is not sent to the current user.

The activated agreement record can now be amended or renewed or terminated or expired.

If you activate an agreement containing documents larger than 25 MB, you will see an intermittent Status Category | Status—In Effect | Being Activated. After the agreement activation is processed, Status Category | Status changes to In Effect | Activated.

Managing Agreement Lifecycle Post-Activation

The contract process consists of the following phases:

- Cloning
- Amendment
- Renewal
- Termination
- Expire

For details, refer to Status Categories and Statuses.

> ⓘ When there are a large number of documents in an agreement and the APTS_AsyncCloneAmendRenew admin entry is set to true, cloning, amendment, and renewal take place in the background. Meanwhile, you can continue to work on other agreements. You receive an email notification after the agreement is cloned, amended, or renewed. For more information, see Admin Entries.

Cloning

Cloning of agreements is a simple and effective way of creating look-alike agreements with similar fields in both new and cloned agreements, however, cloned agreements can have different information. The cloned contracts inherit fields from the original contracts.

Amendment

During the term of the agreement, you may need to modify the contract. For example, the language or terms of the contract. The Amend action is used for this functionality. The Amend action creates a new version of the agreement record. The new, amended record shares the same base agreement number as the original with the decimal point

incremented by one. All the data from the original version is copied into the new version. The new version can then go through the same agreement process as described above. On execution of the amendment, the status category of the original version of the agreement is changed to Amended from In Effect.

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

Renewal

If you renew an agreement, the Renew action creates a new agreement, which is executed after the agreement's terms are updated. You can quickly identify contract renewal candidates, allowing plenty of time to act and create new contract drafts based on the previous contract.

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

Termination

To terminate or end a contract, click the Terminate action.

Expiration

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

Working with Offline Agreements

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

Contract Management along with intelligent data extraction software enables you to intelligently discover a third-party paper. The intelligently discovered third-party paper is

scanned by the optical character recognition method and converted the document to a searchable PDF.

Contract Management supports the following use cases:

- Creating an Offline Agreement
- Importing an Offline Document
- Reviewing an Agreement Created by Intelligent Discovery
- Storing an Executed Agreement
- Status Changes in Offline Agreements
- Importing an Offline Document Using Contract Intelligence

For information on configuring intelligent discovery settings, refer to the Managing Offline Agreements.

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

Creating an Offline Agreement

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

Prerequisite

- You must be logged in to Salesforce.com.
- You must have Create and Edit agreement permissions.
- For administrator configurations, see Managing Offline Agreements.

To create an offline agreement

1. Click **Create Offline Agreement** link under Links. This displays Select Agreement Record Type page.

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

> ⓘ **Note**
>
> You can leave the Intelligent Discovery checkbox unselected if you want to import the document without intelligent data extraction. For information on checking the intelligent discovery processing status in Lightning, see *Reviewing an Agreement Created by Intelligent Discovery*.

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

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

Importing an Offline Document

You can import third-party or offline documents into CLM and run the document through the contract management lifecycle. You can also update the existing document version by importing a document so that the document versioning can be tracked as a single document version. You can import the document as a major version, minor version, or create a custom version. You can also import the document using intelligent discovery to extract and organize unstructured text.

Prerequisites

- The intelligent discovery settings must be configured to import documents using intelligent discovery. For more information, see the Managing Offline Agreements.
- The *XAJS End Point* Comply System Property must be enabled. For more information, see Comply System Properties.
- The maximum recommended file size to upload files is 200MB.

To import an offline document without updating an existing document version

1. On the Agreement Detail page, click **Import Offline Document** to view the Import Document page.

   > ⓘ When you import an offline Conga document that was generated from an existing agreement into a new agreement, the existing metadata is removed and the metadata of the new agreement is added.

2. Click the **Use Intelligent Discovery** toggle button to perform the intelligent discovery or leave the toggle button as is to import the document without intelligent discovery.
3. You can either click **Upload Files** or drag and drop your files. If you had turned on the Use Intelligent Discovery toggle, you can upload only one document.
   The Upload Files popup is displayed.

   > ⓘ You can upload a maximum of 10 documents at once. Repeat the import process if you need to upload more documents.

4. After the upload completes, click **Done**.
   A list of files uploaded is displayed. You can also add comments for each uploaded file.

CLM

> ⓘ If you upload a single file, you can turn on the Use Intelligent Discovery toggle and the uploaded document is intelligently imported. If you upload multiple files, you cannot turn on the Use Intelligent Discovery toggle button.
> For information on checking the intelligent discovery processing status in Lightning, see Reviewing an Agreement Created by Intelligent Discovery.

5. (*Optional*) If you upload an incorrect document, click the delete icon (❌) to remove the uploaded document.
6. (Optional) Add a comment for each file in the Comments column. After you import the document, you can view the added comments in the Document Version Detail page.
7. Click **Import**. You are navigated to the Agreement Detail page.
   When a document is imported using Intelligent Discovery, the Status Category updates to Import and Status updates to Review. When a document is imported without using intelligent discovery, the Status Category and the Status do not change.

To import an offline document by updating an existing document version

Prerequisite: When the **Ancestor selection for Import Offline** comply system property is enabled, you can view the Import Documents popup. For more information, see Comply System Properties.

1. Perform steps 1 to 7 mentioned in the previous section.
2. On the Import Documents popup, toggle **Create Major/Minor Version** on.
3. From the Document Version dropdown, select a document from the list of latest document versions.

   > ⓘ You can view documents of type Agreement Document in the Document Version dropdown.

4. From the Version Type dropdown, select a version type.

   > ⓘ If you select Custom as version type, you can enter a version number up to 9999.9999.

5. (*Optional*) Repeat steps 3 and 4 for all documents you had imported.

   > ⓘ Make sure that you do select different existing documents for all imported documents.

6. Click **Import** to navigate to the Agreement Detail page. According to the document version and version type you had selected, a version number is assigned to imported documents.

Reviewing an Agreement Created by Intelligent Discovery

This section describes how to review an agreement document created or imported by intelligent discovery in Classic and Lightning.

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

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

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

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

Reviewing an intelligent discovery agreement document in Lightning (New UI)

Prerequisite

- You must configure the *APTS_UIPageConfig* admin entry to view the new UI. For more information, see Admin Entries.
- You must configure the intelligent discovery status panel in lightning. For more information, see Configuring Intelligent Discovery Status Panel in Lightning.
- You can see the Intelligent Discovery Status panel only when intelligent discovery is in progress. After the imported document is processed, you can review the document.
- You can perform the following actions on the Intelligent Discovery Status panel:
  - Click the refresh icon (⟳) to refresh the intelligent discovery processing status.

    ⓘ Ensure that you do not click the refresh icon multiple times. You must wait for the processing to complete.

- Click the info icon (ⓘ) to view the latest information for the intelligent discovery status.
  The intelligent discovery will take some time. After the processing is completed successfully, you will receive an email.
- Click the **Ready for Review** link to review the imported document.
- If the processing fails, you can hover on the 🔍 icon to view the error. Click **Retry Import Document** to revert the agreement Status Category and Status to the previous status. After the agreement status reverts to the previous status, you can click **Import Offline Document** to restart the Intelligent Discovery.

To review an intelligent discovery agreement document in Lightning

1. Click the **Ready for Review** hyperlink on the Intelligent Discovery panel.
   This displays the document viewer.

   > ⓘ When you review a document that exceeds 10 MB in size, you can view the Loading Document progress bar to track the document loading progress. If you click **Cancel** on the Loading Document popup, you cannot view the document viewer.
   > You can click the expand icon (↗) on the document viewer or the right panel to expand the view. You can click the collapse icon (↖) on the document viewer or the right panel to collapse the expanded view.

2. On the Agreement Detail tab, you can review the details extracted from the imported document and modify them as required.

   > ⓘ When the Use Normalization setting is enabled while configuring intelligent discovery settings, the agreement details are extracted as strings and these strings are displayed below each agreement field. If the Intelligent Discovery encounters any issue, the date and currency watermark is displayed for the Date and Currency fields. If you need to modify the extracted field values, you can edit the field values and add the required values. If multiple values are extracted for a field, you can select the correct value from the dropdown. The fields in the Agreement Detail tab are configurable and may vary based on the administrator settings. For more information, see Configuring Intelligent Discovery Fields.

3. On the Clauses tab, you can view all the extracted clauses. When you select a clause, you are navigated to the clause location in the document. When you select a

clause that contains special characters and the system is unable to locate the selected clause in the document, you can see a message. When you click **Ok**, you are navigated to the page that contains the clause. You can perform the following tasks in the Clauses tab:

    a. To add a new clause:

        i. Click **New**.

           The New Clause popup is displayed.

        ii. Enter the following details:

            • **Clause Name**: Enter the clause name.

            • **Clause Text**: Enter the clause text.

        iii. Click **Add**.

    b. To insert a clause from the clause library:

        i. Click **Add Clause**.

           The Add Clause popup is displayed.

        ii. In the Search Clause Library search box, search for a clause by entering a keyword. You can refine your search according to Type, Category, Subcategory, Locale, and Language.

        iii. Select a clause from the search results.

        iv. *(Optional)* You can update the clause text.

    c. To modify a clause:

        i. Click the edit icon (✏️). The Edit Clause page is displayed.

        ii. Modify the following details:

            • **Clause Name**: Modify the name of the clause.

            • **Clause Text**: Modify the text of the clause.

        iii. Click **Save**.

    d. To delete a clause:

        i. Click the delete icon (🗑️). This displays the Confirm Delete window.

        ii. Click **Yes**.

4. To save the agreement document, click **Save**.

    You can check out the document with X-Author Contracts and version it.

5. To save your review and revisit the review screen later:

    a. Click **Cancel**. The Warning message is displayed prompting you to confirm if you want to proceed.

    b. Click **Yes**.

        If you had added or modified a clause, the new clause or changes to the clause are saved.

6. To download highlighted or unhighlighted documents:

    a. Navigate to IDE Job Section.

    b. Click the **KIRA** hyperlink.

  c. In the Related tab, select a document you need to download either from the Files or Notes & Attachments section.
   This opens the document in preview mode.
  d. Click the Download button on the top of the page.
   This downloads the document in the default download location of the browser.

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

Reviewing an intelligent discovery agreement document in Lightning (Old UI)

Prerequisite

- You must configure the intelligent discovery status panel in lightning. For more information, see Configuring Intelligent Discovery Status Panel in Lightning.
- You can see the Intelligent Discovery Status panel only when intelligent discovery is in progress. After the imported document is processed, you can review the document.
- You can perform the following actions on the Intelligent Discovery Status panel:
  - Click the refresh icon (↻) to refresh the intelligent discovery processing status.

    > ⓘ Ensure that you do not click the refresh icon multiple times. You must wait for the processing to complete.

  - Click the info icon (ⓘ) to view the latest information for the intelligent discovery status.
    The intelligent discovery will take some time. After the processing is completed successfully, you will receive an email.
  - Click the **Ready for Review** link to review the imported document.
  - If the processing fails, you can hover on the 🧑 icon to view the error. Click **Retry Import Document** to revert the agreement Status Category and Status to the previous status. After the agreement status reverts to the previous status, you can click **Import Offline Document** to restart the Intelligent Discovery.

To review an intelligent discovery agreement document in Lightning

1. Click the **Ready for Review** hyperlink on the Intelligent Discovery panel.
   This displays the document viewer.
   The Language, Document Search, Page Navigation, and OCR Quality of the document

are displayed at the top of the document viewer. The OCR quality determines the quality of the transcription recognized by OCR.

> ⓘ When you review a document that exceeds 10 MB in size, you can view the Loading Document progress bar to track the document loading progress. If you click **Cancel** on the Loading Document popup, you cannot view the document viewer.
>
> You can click the expand icon (⤢) on the document viewer or the right panel to expand the view. You can click the collapse icon (⤡) on the document viewer or the right panel to collapse the expanded view.

2. If the document preview does not load or you need to download the processed document, click the **Download File Returned From Intelligent Discovery** hyperlink from the header.
3. On the Agreement Detail tab, you can review the details extracted from the imported document and modify them as required.

> ⓘ When the Use Normalization setting is enabled while configuring intelligent discovery settings, the agreement details are extracted as strings and these strings are displayed below each agreement field. If the Intelligent Discovery encounters any issue, the date and currency watermark is displayed for the Date and Currency fields. If you need to modify the extracted field values, you can edit the field values and add the required values. If multiple values are extracted for a field, you can select the correct value from the dropdown. The fields in the Agreement Detail tab are configurable and may vary based on the administrator settings. For more information, see Configuring Intelligent Discovery Fields.

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

i. Select the text in the document, right-click, and select **Add Clause**. The Add Clause window with the following fields is displayed.

- **Clause Name**: Set to a clause name by default.
- **Mapped Clause Details**: Clause text of the default clause.
- **Clause Text**: Clause text selected from PDF.

ii. Enter the following details:

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

i. Click **Add**.

c. To modify a clause:

i. Click the ✎ icon. The Edit Clause page is displayed.
ii. Modify the following details:

- **Clause Name**: Modify the name of the clause.
- **Clause Text**: Modify the text of the clause.

iii. Click **Save**.

d. To delete a clause:

i. Click the 🗑 icon. This displays the Confirm Delete window.
ii. Click **Yes**.

5. To save the agreement document, click **Save**.

   You can check out the document with X-Author Contracts and version it.

6. To save your review and revisit the review screen later:

   a. Click **Cancel**. The Warning message is displayed prompting you to confirm if you want to proceed.

   b. Click **Yes**.

   If you had added or modified a clause, the new clause or changes to the clause are saved.

7. To download highlighted or unhighlighted documents:

   a. Navigate to IDE Job Section.

   b. Click the **KIRA** hyperlink.

   c. In the Related tab, select a document you need to download either from the Files or Notes & Attachments section.

   This opens the document in preview mode.

   d. Click the Download button on the top of the page.

   This downloads the document in the default download location of the browser.

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

Reviewing an intelligent discovery agreement document in Classic

Prerequisites

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

To review an intelligent discovery agreement document in Classic

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

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

3. Click **Review Offline Document**. An intermittent page is displayed that checks for document status and the document viewer is displayed.
4. You can review the document, add clauses, update the agreement details and click **Save**.

Storing an Executed Agreement

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

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

Prerequisites

- At least one template must exist for the corresponding agreement record type.
- Refer to Managing Offline Agreements for admin configurations.

To store an executed document

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

   > ⓘ **Note**
   >
   > You can leave the Intelligent Discovery checkbox unselected if you want to import the document without intelligent data extraction. For information on checking the intelligent discovery processing status in Lightning, see Reviewing an Agreement Created by Intelligent Discovery.

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

In the Agreement Clauses section, the clause Action is displayed as Final. When Document Versioning is enabled, the document is added to the Document Versions related list. When Document Versioning is disabled, the document is added to the Notes & Attachments section.

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

Status Changes in Offline Agreements

The following table provides an overview of changes in the agreement status category and status in offline agreements.

Action	Status Category | Status (without Intelligent Discovery)	Status Category | Status (with Intelligent Discovery)
Create Offline Agreement	In Authoring | <Blank>	Import | Review
Import Offline Agreement	No change in status	Import | Review
Review Offline Document	N/A	Offline Agreement: In Authoring | Author Contract, Executed Agreement: In Filing | <Blank>
Store Executed Agreement	In Filing | <Blank>	Import | Review

Importing an Offline Document Using Contract Intelligence

You can import third-party or offline documents into CLM and run the document through Contract Intelligence to extract data from your documents.

Prerequisites

- You have a Conga Contract Intelligence license.
- Contract Intelligence for Conga CLM is configured as described in Setting Up Conga Contract Intelligence.

To import documents using Contract Intelligence

1. Navigate to the Home page or the Agreement Detail page.
2. From the Conga Contract Intelligence - Document Action section, click **Intelligent Document Import**.
3. The Conga Contract Intelligence dashboard opens in a new tab. Import documents using Conga Contract Intelligence as described in Importing Documents and Files.

Working with Agreements

This section covers the following topics:

- Searching Agreement Documents
- Viewing Agreement Hierarchy
- Emailing Multiple Agreement Documents
- Accessing In-Effect View
- Viewing Account's Agreement Hierarchy
- Clause Versioning
- Uploading Signed Documents
- Merging Documents in Salesforce Lightning
- Importing Supporting Documents
- Using Smart Search to Search Content in Agreement Documents in Lightning
- Working with Documents

Searching Agreement Documents

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

Contract Management uses:

- Salesforce Document search to retrieve search results. For more information, see Salesforce Documentation.
- Find Query to retrieve the document matching the search results from the agreement attachment. For more information, see Salesforce Documentation.

You can enter a keyword in the search box and click **Search** to search across all the agreement documents in Contract Management. You can also use the basic search filters to narrow down the search results. You can use the operators (**" "**, **AND**, **OR**, **AND NOT**, and **( )**) to search agreement documents. The following table provides an overview of various use cases for searching agreement documents and sample search queries with different operators.

Operator	Use case	Sample search query
NA	Search for documents that have two words but in different locations.	Confidentiality Obligations
" "	Search for documents that have two consecutive words.	"Confidentiality Obligations"
OR	Search for documents that have either Confidentiality or Obligations	Confidentiality **OR** Obligations
AND	Search for documents that have both Confidentiality and Obligations	Confidentiality **AND** Obligations
AND NOT	Search for documents that have Confidentiality but not obligations	Confidentiality **AND NOT** Obligations
( )	Search for documents that have Confidentiality and either Obligations or Privacy	Confidentiality **AND** **(**Obligations **OR** Privacy**)**

The Salesforce document search is based on the fuzzy matching method. This means the search results are not exactly the same but similar to the search string. For example, if you search for the word *Confidentiality*, you will see the search results containing the words *Confident*, *Confidential*, and *Confidentiality*. You can click the expand icon below a search result to view the content snippet. The content snippet displays an excerpt from the agreement document that contains the text that exactly matches the search string. The first occurrence of the search string is highlighted in the content snippet. For example, if you search for the word *Confidentiality*, you will view the content snippet for the search results containing the word *Confidentiality*. If the search text is an agreement field or there is no exact match in the agreement, the content snippet is not displayed.

Restrictions

- You can view the content snippet and preview documents for documents less than 10 MB in size.
- You can search agreement documents that are less than 25 MB in size.
  For information on supported file sizes, see Supported File Sizes in Lightning and Supported File Sizes in Classic.

Salesforce Limitations

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

To search agreement documents

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

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

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

   > ⓘ **Note**
   >
   > You can use the **APTS_DocumentSearchBasicFilters** property to add or remove search filters according to your requirement. For more information, see Admin Entries.

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

   > ⓘ **Note**

> The Search Contract Documents page displays a maximum of 1000 search results.

6. (*Optional*) Click the agreement name or agreement number hyperlink to navigate to the Agreement Detail page.
   The Agreement Detail page opens in a new tab.
7. Click the expand icon (>) to view the content snippet. In the content snippet, the first occurrence of the search text is highlighted and the corresponding page number to which the content snippet belongs. If the keyword is an agreement field, the content snippet is not displayed.
8. Click the download icon (⬇) to download an agreement document containing the keyword or text.
9. Click the preview icon (👁) to view the keyword or text in an agreement document in the Document Viewer window.
10. In the Document Viewer window, click ‹ to go to the previous instance of the keyword or click › to go to the next instance of the keyword in the agreement document.
11. Click **Cancel** to exit the Document Viewer window and return to the search results.
12. Select multiple documents from the search results and click the email icon (✉) to send a downloadable link to download multiple documents of multiple agreements through email.
    For more information, see Emailing Multiple Agreement Documents and Scheduling Expiration Date for Email Downloadable Link.

Viewing Agreement Hierarchy

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

- Parent agreements
- Child agreements
- Related agreements
- Amended and renewed agreements

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

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

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

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

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

Prerequisite

You must configure the Agreement Hierarchy button. For more information, see Adding Agreement Hierarchy Button.

To view agreement details and related agreements

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

To customize agreement hierarchy view

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

Emailing Multiple Agreement Documents

You can share a downloadable link for downloading multiple documents of multiple agreements through email. You can send the email to selected contacts or to a user group without downloading the agreement documents and sending them through email individually. You can send multiple documents from the Agreements tab or search results from the Smart Search tab.

Prerequisite

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

To email multiple agreements

1. Navigate to the Agreements tab or navigate to the Smart Search tab and generate search results.
2. Select the checkboxes for the agreements that you want to email.

> ⓘ **Note**
>
> You cannot select more than 200 agreements.

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

> ⓘ **Note**
>
> The recommended maximum file size to email agreements is 2 GB PDF or 150 MB MS Word document and the recommended maximum number of flies to email agreements is 100.

5. To email the downloadable link, click **Email Downloadable Link**.
   This displays a message that the downloadable link is being generated.
6. To add or remove the selected agreements, click **Modify Agreement Selection**. This opens the Modify Agreement Selection window.
   You can perform the following actions on the Modify Agreement Selection window:
   a. Click the **Next** or **Previous** links to navigate to other pages.
   b. From the List of Unselected Agreements, select the agreements you need to add to the selection and click **Add Selected**.
   c. From the List of Selected Agreements, select the agreements you need to remove from the selection and click **Remove Selected**.
   d. Click **Apply**.
      The agreements that have documents are displayed on the Select Agreement(s) Document(s) To Email page.
7. When the downloadable link is ready, the Send an Email page is displayed.
8. Enter or use the lookup icon to add recipients to the **Related To**, **Additional To**, **Cc** or **Bcc** fields.

9. Click **Send**.

   An email is sent to all recipients.

To download the agreement documents

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

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

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

Accessing In-Effect View

You can use the In-Effect View to gather key information and agreement data of the agreement that has been In-Effect at least once. You can view the agreement data such as agreement details, clauses, and documents that are cumulatively effective and enforced by the latest in-effect agreement. You can also track the amendments of the agreement to view combined data from the original and amended agreements that are part of the in-effect agreement at any given point of time. In-Effect View is available for the agreements

with Status Category as In Effect and Status as Activated. In Effect View is not supported when clauses are copied during amendment.

Prerequisites

- You must configure the In-Effect View button. For more information, see Adding In-Effect View Button.
- You can access In-Effect View for the agreements with Status Category as In Effect and Status as Activated.
- The fields available on Agreement Details In Effect are according to the value defined for the APTS_InEffectViewMetadataFields admin object. For more information, see Admin Entries.
- You can configure the header fields. For more information, see Configuring In-Effect View Page Header.

To view the In-Effect View

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

To view the change history of agreement fields

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

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

To view the change history of clauses

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

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

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

To view and email in-effect documents

Prerequisite: Content Delivery must be enabled.

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

[Multiple Agreement Documents](#) and [Scheduling Expiration Date for Email Downloadable Link](#).

Viewing Account's Agreement Hierarchy

You can click the **Agreement Hierarchy** button on the Account Detail page to view all the agreements of that account. The agreement hierarchy page displays a hierarchical list of agreements related to the current account. The current account refers to the account for which you are viewing the agreement hierarchy. Hierarchical relationships to the current account include parent agreements, child agreements, related agreements, amended agreements, and renewed agreements. Renewed and amended agreements are displayed as child cards in the agreement hierarchy.
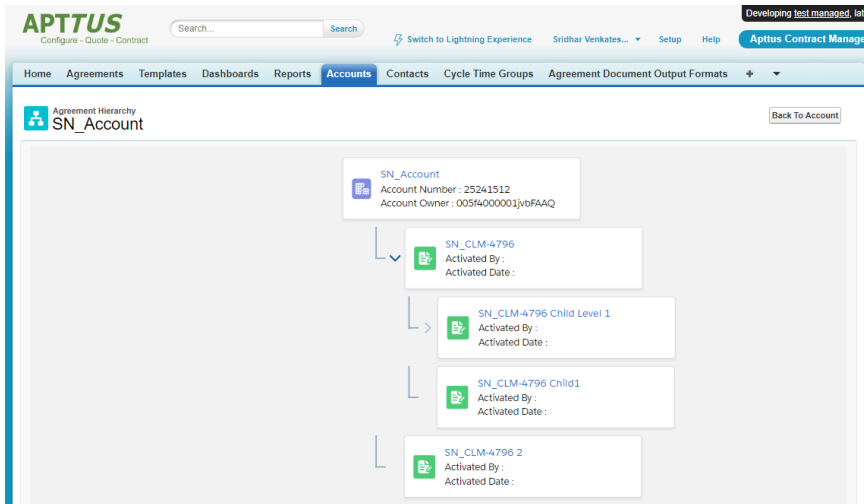
The fields displayed on the account card (first card) are according to the value set for the **APTS_AccountHierarchyFields** admin object. The fields displayed on the agreement cards are based on the **APTS_AgreementHierarchyFields** admin object. For more information, see [Admin Entries](#).

Prerequisite

You must configure the Agreement Hierarchy button. For more information, see [Adding Agreement Hierarchy Button for Accounts](#).

To view agreement details and related agreements

1. Navigate to the **Accounts** tab.
2. Click an account name.

3. Click **Agreement Hierarchy**.
4. Hover over an account card and click ⏷. Select either of the following options:
    a. Select *View Record* from the menu to view the details of the agreement. The Agreement Detail page of the selected agreement opens in a new tab.
    b. Select *Show Related Agreements* from the menu. A window containing Child Agreements and Related Agreement opens.
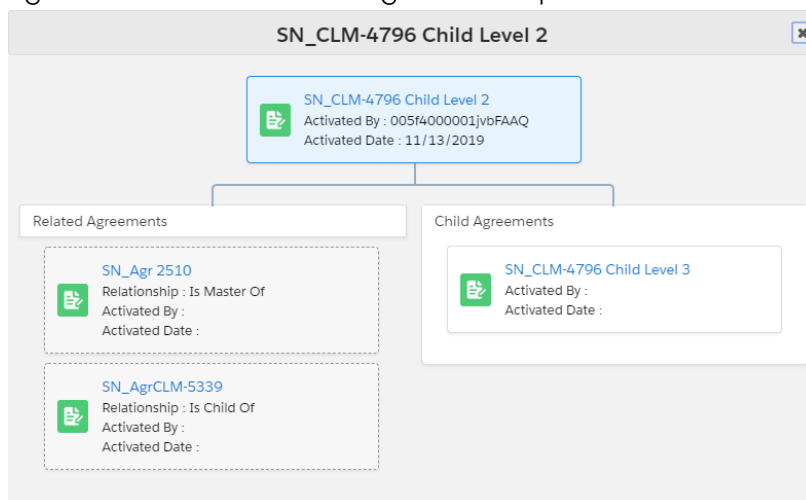
To view child agreements

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

Clause Versioning

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

Prerequisite

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

To view versions of a clause

1. Navigate to the Agreement Detail page

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

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

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

Agreement Action	Clause Status
Generate or Regenerate	Original
Store Executed Agreement, Upload Signed Document, or eSign	Final
Create Offline Agreement or Import Offline Document	Inserted
A smart clause is modified and checked-in from X-Author Contracts	Modified
A smart clause is deleted and checked-in from X-Author Contracts	Deleted
A main clause is replaced with an alternate clause in OCC	Swapped
Checking in from X-Author Contracts as Final to be signed	No status change

Uploading Signed Documents

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

Prerequisite

- You can view the Upload Signed Document button after you send a document for signatures (manual or wet signatures).
- The **Intelligent Import for Signed Document** Comply System Property must be enabled to view the intelligent import option and intelligently import signed documents. The Intelligent Import settings must be configured in your org. For more information, see Comply System Properties and Configuring Intelligent Import Settings.

Restriction

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

To upload signed documents

1. In the Agreement Action Panel, click **Upload Signed Document**.
2. Click the **Use Intelligent Discovery** toggle button to perform the intelligent discovery or leave the toggle button as is to import the document without intelligent discovery.

   > ⓘ When the Intelligent Import for Signed Document comply system property is enabled, the Use Intelligent Discovery is turned on by default.

3. You can either click **Upload Files** or drag and drop your files. If you had turned on the Use Intelligent Discovery toggle button, you can upload only one document.
   This displays the Upload Files popup.
4. After the upload completes, click **Done**.
   A list of files uploaded is displayed. You can also add comments for each uploaded file.

   > ⓘ If you upload a single file, you can turn on the Use Intelligent Discovery toggle button and the uploaded document is intelligently imported. If you upload multiple files, you cannot turn on the Use Intelligent Discovery toggle button. If you send multiple documents for signatures, you need to upload all the signed documents together. If you send multiple documents for signatures and upload only one document, the uploaded document is considered as the final document.

5. Click **Import**.
   You are navigated to the Agreement Detail page.

For documents imported without intelligent discovery, the **Status Category | Status** of the Agreement is updated to **In Signature | Fully Signed**. The Executed Date field is updated. When you upload a signed document without intelligent discovery, all the clauses are marked as Final in the Agreement Clauses section.

For documents imported with intelligent discovery, the **Status Category | Status** of the Agreement is updated to **Import | Review**. The Review Offline Document button is enabled and you can review the intelligently imported document. The fully signed documents are added as a major version with the name - Upload Signed Document in the Document Version related list. In the version aware agreements, the Document Type of the uploaded executed documents is updated as an Executed Document. When you upload a signed document using intelligent discovery, all the clauses recognized by the IDE are marked as Final in the Agreement Clauses section. If the APTS_AsyncMergeEmail admin entry is set to true, you will receive an email notification after the signed document is uploaded. For more information, see Admin Entries.

Merging Documents in Salesforce Lightning

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

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

- Document type
- Document permission
- Watermark
- Redlines
- Order of the documents

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

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

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

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

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

Prerequisites

- You need to set up new agreement protection for merge documents. For more information, see the topic Configuring Agreement Document Protection.
- You can merge the documents in DOC, DOCX, and PDF format in version-aware agreements.
- Ensure that you have at least two different documents (documents generated using different templates) available in your agreement.
- You can use the APTS_AppendVersionNumberToMergedDocs admin entry to suffix the name of the merged documents with a version number. For more information, see Admin Entries.

Restrictions

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

Limitations

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

To merge documents

1. On the Agreement Detail page, click **Merge Documents**. This displays the Merge Documents page.
2. Enter a name for the merged document in the Document Name field.
3. Select DOCX or PDF as the merged document output type.

4. Select Retain Header and Footer to retain the header and footer of the original documents in the merged documents.
   (Or)
   Select Custom Header and Footer to see Header and Footer fields and add custom header and footer.

> (i) When you neither select Retain Header and Footer nor Custom Header and Footer, the header and footer are removed in the merged document. When the **APTSKeepSectionBreak** admin entry is set to false and you select Retain Header and Footer, the documents will be merged together retaining the header and footer of the first document without keeping any section break. When the **APTS_DefaultHeaderFooterOptionForMerge** admin entry is configured, you can see either the Retain Header and Footer or Custom Header and Footer checkbox selected by default. For more information, see Admin Entries.

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

Importing Supporting Documents

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

To import supporting documents

1. In the Agreement Action Panel, click **Import Supporting Document**.
   This displays the Import Supporting Document page.
2. You can either click **Upload Files** or drag and drop your files.
   This displays the Upload Files popup.

   > ⓘ You can upload a maximum of 10 documents at once. Repeat the import process if you need to upload more documents.

3. After the upload completes, click **Done**.
   A list of files uploaded is displayed. You can add comments for each uploaded file. You can also change the Document Type to Other or custom. The default Document Type is set to Supporting Document.
4. Click **Import**.
5. After the import completes, you are navigated to the Agreement Detail page.
   You will receive an email after the documents are imported. The imported documents are added as a major version with the name as Supporting Document in the Document Version related list.

Using Smart Search to Search Content in Agreement Documents in Lightning

The Smart Search feature allows you to search for information without the need to understand the working of CLM. This feature allows you to find information of any record regardless of where the information is stored. Smart Search supports natural language search. This means you can search for information in CLM using everyday language. The search returns a list of agreement documents that match all your search queries.

You can configure a quick search box on the Home page to initiate your search on the Home page without the need to navigate to the Smart Search tab. For more information, see Setting Up Quick Search on the Home Page.

You can use Smart Search in MS Teams, Slack, or Webchat similar to a chatbot.

The Smart Search feature allows you to:

- Search information using keywords, queries, semantic, and natural language.
- Configure the fields that you can see on the search grid.
- View the content snippet that contains the search query.
- Preview the document.
- Open the document in PDF viewer.
- Download the document.
- Email the search results.
- Apply filters and conditions to narrow down the search results.
- Use search operators (AND, OR).
- Save, edit, and delete search queries and make them private or available to the other users in your org.

You can perform the following types of search:

Search Type	Description	Example
Keywords	Search with objects within the scope	• Object name: Agreement Name • Name of the document: "MSA with Conga" • Clause name: Terms and Conditions • Account name: ABC corporation
Search operators	Search with search operators (AND, OR). You can specify a main object as well as a related object.	• Agreement Start Date greater than "1/1/2021" AND Agreement End Date less than "31/1/2021" • Account equals "ABC Corporation" AND Status Category equals "Import" AND Status equals "Review" • Record Type equals "MSA" AND Region equals "North America" OR Region equals "Europe"

Search Type	Description	Example
Search operator + Keyword	Search with search operators and keywords	Agreement Start Date greater than "1/1/2021" AND Agreement End Date less than "31/1/2021" + Keyword "Force Majeure"
Context-Driven or scope	Narrow down query scope with specific inputs	Agreement Start Date greater than "1/1/2021" AND Record Type = MSA AND (Account Type equals "Customer" OR Account Industry equals "Manufacturing"
Natural language	Search in everyday language using a main object	• Pull up agreements with a start date greater than 1st of January 2021 • Pull up agreements over 100K • Pull up agreements that are net due • Contracts with payment term net 30
Natural language with nested	Search in everyday language using a main object and related object	Pull up the service clauses for agreements over $20k
Natural language with nested and Keywords	Search in everyday language using a main object, related object, documents, and clause text	Find all agreements over 100K which have a Force Majeure mentioned in them.

Search Type	Description	Example
Natural language with nested, keywords, and boolean expressions	Search in everyday language using a main object, related object, documents, and clause text along with boolean expressions	• Find all agreements over 100K which contains both Force Majeure and Limitation of Liability. • Find all agreements over 100K which contains Force Majeure and Limitation of Liability and Indemnification • Find all agreements of type MSA over 100K which contains both Force Majeure and Limitation of Liability • Find all agreements over 100K which contains Force Majeure and not Audit Rights
Natural language nested, keywords, and synonyms	Search in everyday language using a main object, related object, documents, and clause text along with synonyms	• Pull up agreements over 100K which have the mention Act of God • Pull up agreements over 100K which have the mention "Act of God"
Natural language nested, keywords, synonyms, and boolean expressions	Search in everyday language using a main object, related object, documents, and clause text along with synonyms and boolean expressions	Pull up agreements over 100K which contain an Act of God but not Indemnification
Natural language nested, keywords, synonyms, boolean expressions, and scope	Search in everyday language using a main object, related object, documents, and clause text along with Boolean Expressions and scope	Find all agreements of type MSA over 100K which mentions both Act of God and Limitation of Liability
Basic semantic	Search with keywords along with context	Pull up top 3 agreements from last year

> ⓘ Please contact the Conga Support team to add custom synonyms in the Smart Search.

Prerequisite

Ensure that you have generated the registration setting to use the smart search feature. For more information, see Generating Registration Setting.

Limitations

- Email and export options do not work when you search using search operators.
- You cannot click the remove icon (✕) for the queries displayed below the search bar.

To search content in agreement documents

1. Navigate to the Smart Search tab.

   > ⓘ If you have configured the quick search box on the Home page, you can initiate the search with a keyword or a query in natural language. When you press Enter, you are navigated to the Smart Search tab and you can view your query results.

2. Enter a keyword, phrase, or text (natural language) in the search box and press **Enter**. A list of search results is displayed in rows. You can view the number of search results below the search box. You can sort the columns alphabetically by clicking the sort icons (↓ or ↑) on the column headers. You can also expand the column size by dragging the column border.

3. Click the expand icon (❯) to view the content snippet that contains the search query. In the content snippet, the first occurrence of the search text is highlighted.

   > ⓘ If you search with multiple keywords, all the keywords are highlighted in the snippet and you can also view the page number in which the keyword is found. If there is no text found matching in a document, the snippet is not displayed.

4. Click a result row to preview the document in the right panel.

   > ⚠ The preview is not available for documents that are stored in the agreement document. To open the document, click **PDF Viewer.**

5. To open the document, click the **Open in PDF Viewer** hyperlink.

    The document opens in the Conga-provided PDF viewer.

    > ⓘ If there is a problem in loading the preview screen, an error message is displayed. You can click PDF Viewer in the error message to open the document in PDF viewer.

6. Click the download icon (⬇) to download the document.

7. Click the document name to download the original document associated with the record.

8. Click **Close** to close the PDF viewer and return to the search results page.

9. From the header icons, you can perform the following tasks:

    a. Email the search results:

        i. Click the email icon (✉) to share the search results with other users through email.

            The Share Search Results popup is displayed.

        ii. Enter the following details:

            1. From the Share selected items in the format of dropdown, select HTML, Excel (.csv), Excel (.xlsx), or PDF format.
            2. **From**: Select an email address.
            3. **To**: Add email addresses of the recipients.
            4. Click **CC** beside the To field to add CC recipients.
            5. *(Optional)* **Subject**: According to your search, the subject is already added. You can also edit and customize according to your requirement.

                The body of the content contains the search results.
            6. Select HTML, Excel (.csv), Excel (.xlsx), or PDF format according to your requirement.

        iii. Click **Share**.

            > ⓘ You can navigate to the Agreement Detail page by clicking the agreement name hyperlink in the exported document. You can use the org-wide email address while sending an email. For more information, see Setting Up Organization-Wide Email Address. You can share multiple documents displayed in the search result as a downloadable link with a Salesforce Contact or any recipient. For more information, see Emailing Multiple Agreement Documents.

    b. Export the search results:

      i. Click the export icon (⬆) to export the search results.
        The Export Selected Files popup is displayed.

      ii. Select PDF or XLS according to your requirement.

     iii. Enter a file name and click **Export**.

c. Configure the search result columns:

      i. Click the settings icon (⚙) to configure the fields that must be displayed as columns to search results.

        The Select Fields to Display popup is displayed. In the Available Fields column, you can see object names. when you select an object, you can see primary and secondary-level fields in an object. In the Visible Fields column, you can see the fields visible on the search grid.

        Default fields in the Visible Fields column are highlighted in yellow and cannot be moved. When you select a field to move, the field is highlighted in blue.

      ii. In the search bar, type an exact field name to search for a field.

     iii. Drag and drop fields from Available Fields to Visible Fields or change the position of a field.

     iv. To add a new field to the search results, select a field from the Available Fields and click the ▶ icon to move the field to Visible Fields.

      v. To remove a field from the search results, select a field from the Visible Fields and click the ◀ icon to move the field to Available Fields.

     vi. To reorder the fields that must be displayed to search results, click ▼ or ▲ . You can also drag and drop fields to rearrange the fields.

    vii. Click **Save**.

        The field configuration is automatically applied to future searches.

> ⓘ When your search query includes a field that is not configured as a search result column, the field included in the search query is displayed as a search result column.

d. Close the preview panel:

      i. Click the preview icon (👁) to close the document preview.

10. Click the Agreement Name hyperlink to navigate to the Agreement Detail page.

To apply filters to search results

1. Click the filter icon (▼) to apply filters to your search results.
   The filter popup is displayed.
2. Select a Primary Object from the dropdown.
3. From the Take Action When section, you can select one of the following options:

Option	Description
All conditions are met	If one of the conditions is false, the flow evaluates the next outcome's conditions.
Any condition is met	If one of the conditions is true, the flow immediately takes this outcome's path.
Custom	When you select this option, you can enter the condition logic by entering up to 1000 characters in the Custom Logic field. You can use: • Numbers to refer to each condition • AND or OR to identify which combination of conditions must true • Parentheses to group parts of the string together Sample expression: ((1 AND 2 AND 3) OR 4)

4. Click **Add Filters** to add additional filters.
5. Select a field and an operator from the respective dropdowns.
6. Enter a value for the field.
7. Click **Add Related Objects** to add related objects.
8. You can add conditions and filters similar to the primary objects.
9. Click **Apply**.

   You can view the applied search filters below the search box.

To save a search query

1. Click **Save Search**.

   The Save Search popup is displayed.

2. Enter a search name, description, and select the visibility option.

   > ⓘ If you select Private as the visibility option, only you can see the saved search. If you select Public as the visibility option, all the users in your org can view the saved search.

3. Click **Save**.

To use a saved search

1. Click the ▼ icon to view the saved searches.

2. Select a saved search.

    The search results are displayed.

To edit a saved search

1. Click the ▼ icon to view the saved searches.
2. Click **Edit**.

    The Edit Saved Search popup is displayed.
3. Click the edit icon (🖉).
4. Update the required details and click **Update**.

To delete a saved search

1. Click the ▼ icon to view the saved searches.
2. Click **Edit**.

    The Edit Saved Search popup is displayed.
3. Click the delete icon (✕).

    The saved search is deleted.
4. Click **Save**.

To use smart search as a chatbot

Prerequisite: To configure smart search in MS Teams, Slack, or Webchat, write to SmartSearch-Onboarding@conga.com. You will receive a configuration link email from the Conga Support team.

1. Click the link received from the Conga Support team.
2. Login to salesforce.
3. Enter your query in MS Teams, Slack, or Webchat.

    Sample query: Pull up agreements that contain Force Majeure, Term, Rights, and

Affiliate.

4. You can sort the results and view more details.
5. Enter **show me snippet for #<*number*>** to see the snippet of a search result.
   Sample: show me snippet for #5.
6. Click **Send it to me** to share the snippet as an email.
7. Verify the email id and click **Yes! Go ahead** to send the email.
8. *(Optional)* Click **Change recipient** to change the email address of the recipient.

Working with Documents

In the Documents tab, you can view all documents available in the agreement. When an agreement is version-aware, you can view the latest version of a document and click the expand icon to view older versions. You can also delete a document or multiple documents based on the user or profile permission. You can configure the columns that are visible on the Documents tab.

The following screenshot shows the Documents tab.
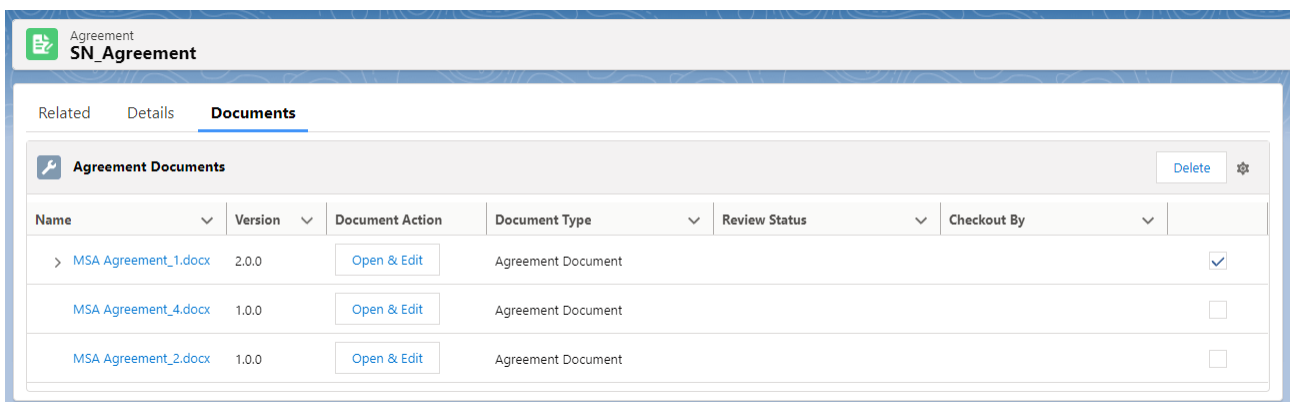
Prerequisite

The Documents tab must be configured by your administrator to view the Documents tab. For more information, see Configuring Documents Tab in Lightning.

To delete a document

1. Select one or multiple documents to enable the **Delete** button.

    > ⓘ When an agreement is version-aware, you can select only the latest version of a document. When you delete the latest version of a document, all the versions of that document are deleted.

2. Click **Delete**.

To configure the columns

1. Click the settings icon (⚙) to configure the fields to view the Select Fields to Display popup.
2. To add a new column, select a field from the Available Fields and click the ▶ icon to move the field to Visible Fields.
3. To remove a column, select a field from the Visible Fields and click the ◀ icon to move the field to Available Fields.
4. To reorder the columns, click ▼ or ▲ .
5. Click **Save**.

Contract Document Versioning

Contract Document Versioning enhances existing version control by introducing a solution framework of document versioning at the Agreement record level. Without Contract Document Versioning, all agreement documents are included in the Notes & Attachments related list, requiring that the agreement owner or other parties determine the proper document version or versions for review, signature, finalization and activation. Document Versioning adds two new child objects with relationships to the Agreement object: **Document Version** (child object to Agreement) and **Document Version Detail** (child object to Document Version).

When Document Versioning is enabled for your organization, not every document is attached to an agreement's Notes & Attachments Related List. Instead, each major version

of a document is populated in the Document Versions Related list, with individual version information tracked using Document Version Details.

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

Restriction

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

About Document Versions Concepts

Contract Document Versioning divides the version of an Agreement document into three parts: Major, Minor and Revision. Each version of an agreement document is represented as a period-delimited numeric value in the Document Version Details object (e.g., "1.0.0"). As different users perform various actions on the document, version values are numerically incremented. The following table describes each version type represented by the version value and how it is created.

Version Type	Document Action	User Role	Example Value
Major	A major version type is created every time a user: • Generates a document. • Regenerates a document. • Creates an Offline document. • Imports an Offline document. • Generates a supporting document. • Checks in a Clean document or a document without Redlines. • Checks in a document as Final. A MAJOR version can be either a new document instance or an incremented version of a pre-existing document. For further explanation, see New Document Versus Incremented Version.	Contract Requestor / Owner	1.0.0 2.0.0 3.0.0
Minor (Negotiator)	A minor version is created every time a Negotiator makes changes to the document and checks it in using X-Author for Contracts with the following exceptions: • The Negotiator checks in the document as Clean or Final (creates a MAJOR version). • The Negotiator checks in a document on behalf of a Reviewer (creates a REVISION– see below).	Negotiator	1.1.0 2.1.0 1.2.0

Version Type	Document Action	User Role	Example Value
Revision (Reviewer)	A revision is created every time a document is returned by a reviewer to the Negotiator. The document is either returned by the reviewer as an email attachment and checked in using the *X-Author Contracts for Outlook* plug-in, or checked in on their behalf by the Negotiator (for both internal and external reviewers) using *X-Author Contracts for Word*. For more information on Send for Review using X-Author, see the X-Author Contracts documentation .	Reviewer	1.0.1 2.0.2

New Document versus Incremented Version

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

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

Viewing Document Versions on an Agreement Record

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

- Click on the link under **Name** to View *all document version details* for the chosen agreement document.
- Click on the link under **Template** to View Template record details.
- Click on the link under **Latest Version Detail** to View document version details for the *latest version* of the agreement document.

> ⓘ **Note**
>
> The name of each entry under Document Versions is based on the naming convention for Document Versions decided by your administrator. For more information, see Enabling Contract Document Versioning.

Viewing Document Version Details

You can use Document Version Details to view all versions of a specific agreement document. Versions in the table are listed in ascending order from oldest to newest version and break down each version value as Major, Minor or Revision. You can also see the action taken to create a specific version of the Agreement document. In the example below, the user has drilled down into the Document Version Details for the primary agreement document (click on the image to enlarge the view).
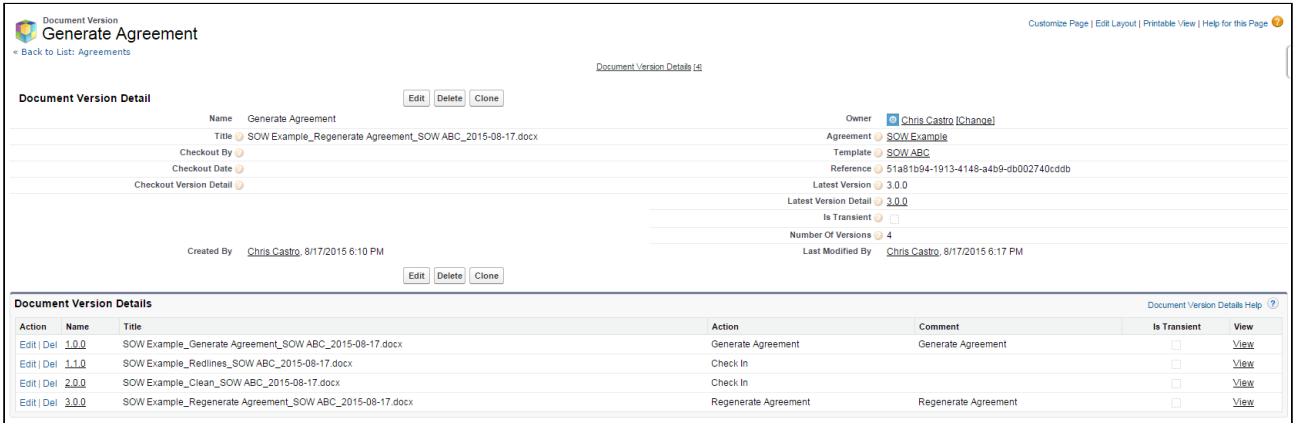
In this example, the following actions created the listed document versions:

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

To Download a Specific Version of the Agreement Document

Click the **View** link in the appropriate row. The agreement document is downloaded to your local drive.

Checking in the Final Version

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

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

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

final document version and final PDF attachment

Document Versions and Template Versioning

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

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

To view the template version used to generate the document:

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

Searching and Viewing Version-Aware Documents

The contract negotiation process for agreements often involves multiple iterations of agreement documents for a particular record: primary agreement documents, third-party paper, addendums and schedules and any number of other versioned documents. As a result, it can sometimes be difficult task to find the right document to work with. **Document**

Finder extends Contract Document Versioning by providing a Visualforce page on the Agreement record to permit Contract Management users to use filters and tags to quickly search for and view version-aware agreement documents.

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

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

Prerequisites

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

- Contract Document Versioning must be enabled.
- Document Finder must be added to the Agreement record layout and the Document Finder Visualforce Page must be added to user profiles.
- One or more version-aware agreement documents must be attached to the record.

> ⓘ **Note**
>
> Refer to the table in the following section for guidance on which filters are available only with version-aware documents.

Using Document Finder

To begin using Document Finder, open an agreement record with one or more version-aware documents and scroll to the section containing Document Finder.

By default, all version-aware documents you have access to are listed in Document Finder.

Searching for Documents by Document Name or Keywords

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

1. Enter a name or keyword into the Document Finder search box. (Note: If there a predefined tags set by the Default Document Tags property, or from previous check-ins of other agreement documents, they will be displayed in a drop-down).
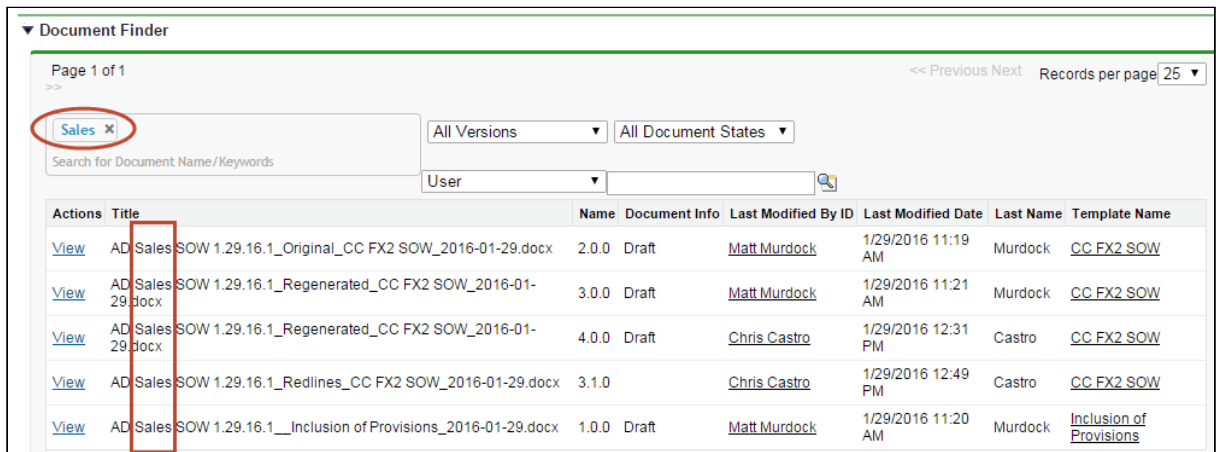
2. Press **Enter** or type a comma (,) at the end of each name or tag you enter. You can enter any number of values. The list of documents updates as you enter each tag.
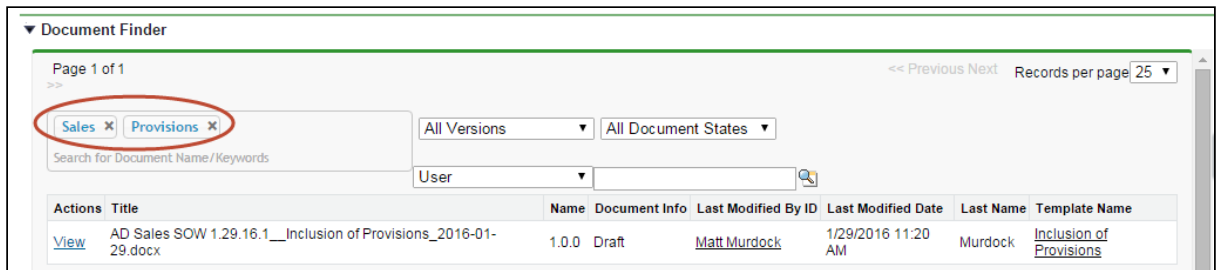
3. After you enter a name or a tag, click on the 'X' in the tag (tag ✖) to remove it from your search. This updates the document list to reflect only the current keywords/tags.

4. Click **View** next to any document to download it.

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

Refine Your Search

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

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

Contract Wizard in Classic

Use the Contract Management Contract Wizard to run custom, user-friendly Wizards based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). These Wizards are intended to be used by sales representatives, purchasing agents, HR managers, and other users to quickly create their own records by entering responses to criteria-based inputs that follow a logical series of steps. Wizards can also be used to collect data from customers to be posted to internal systems or for other business use.

Use the Wizards tab to run Wizards from the existing Wizard Designs. You can easily search and select from Wizard designs to create well-formed records. Wizards also contain a

feature that allows users to review their responses prior to submission, returning to previous steps to make changes or corrections. Users can also use the tab to resume completion of in-progress Wizards or review completed or aborted Wizards.

For information on creating Wizards using the Wizard Designer, see Contract Wizard.

Using the Wizards Tab

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

To search for Wizards

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

To continue an In Progress Wizard

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

1. Navigate to the Wizard using the type-ahead feature or page navigation.
2. Click **Continue** under the Action column. The Wizard opens in a new tab at the current step.

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

To review a completed Wizard

You can revisit the Review page for a Submitted or Aborted Wizard once it is complete.

1. Navigate to the Wizard using the type-ahead feature or page navigation
2. Click **Review** under the Action column. The Wizard opens in a new tab and displays the Review page (you can no longer edit any steps).

Running a Wizard

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

To run a Wizard

1. From the Salesforce application menu, choose **Apttus Contract Wizard**. The application displays the Home tab and the **Wizards** tab (you will see additional tabs if you have permissions to create Wizards).

2. Choose a Wizard to run from the drop-down list of designs and click **Go**. Note: Wizards associated with deactivated or retired Wizard designs will not be available in this list.

> ⓘ Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.

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

4. Move through the steps of the Wizard, choosing values for the fields in each step. Click Next when you are finished with a step to move to the next step. Click Back to return to the previous step. Click Save to save the data on the current wizard page.

> **ⓘ Note**
>
> You must fill in all the required fields on the current wizard page before clicking Save; otherwise, the Wizard will throw a validation error.

When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option(s). For example, in the following step, when you choose "Sales Contract" as the business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.

5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), click **Attach Files** to attach files to the Wizard step.

When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:

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

b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.

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

> ⓘ If you have an 'Import Offline Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Agreement Document. If you have an 'Import Supporting Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Supporting Document.

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.
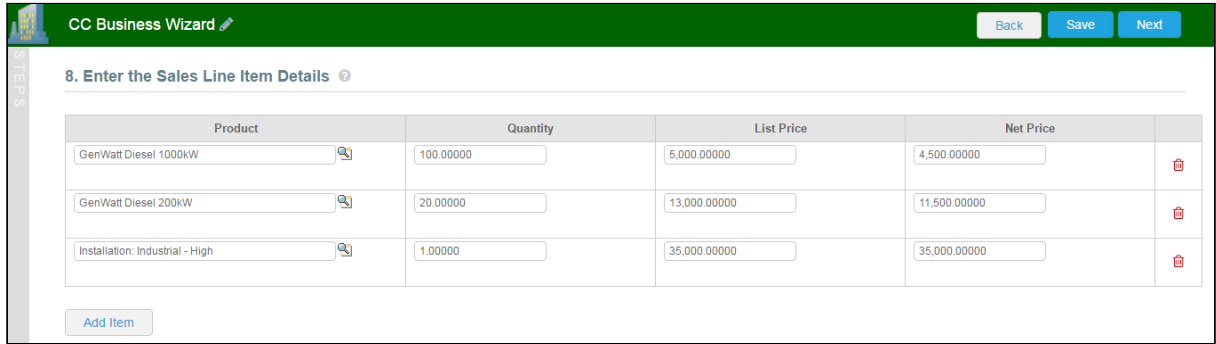
7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see Using the Wizards Tab).

8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.
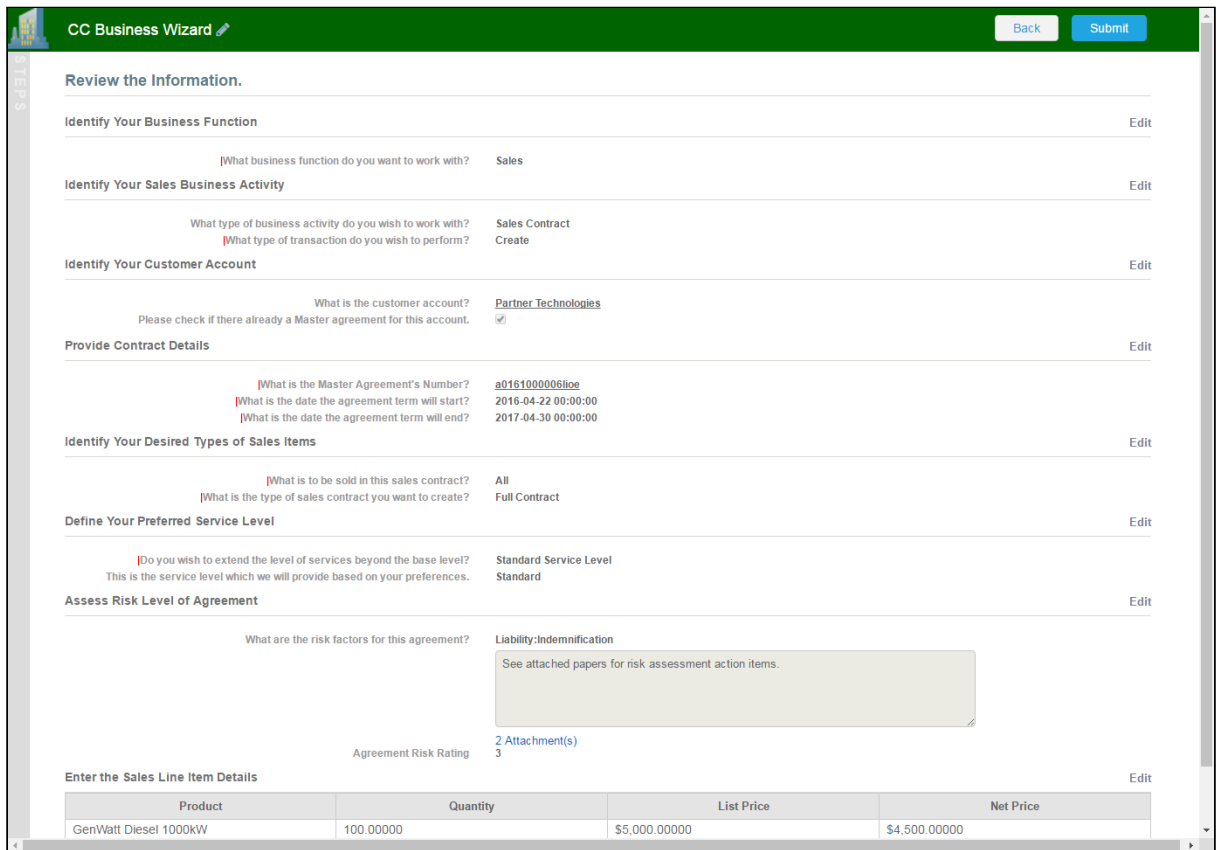
9. Click **Edit** to change your answers for any steps in the Wizard. A dialog warns that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.

10. Click **OK** to edit the step or **Cancel** to return to the Review page.
11. When you are satisfied with your responses, click **Submit.**

    Depending on the design of the Wizard, one or more of the following will occur:

    - A record of the type determined by your inputs within the Wizard will be created (e.g., a Sales Agreement record).
    - You will be redirected to the record details page of the record just created by the Wizard.
    - You will be redirected to another page in Salesforce.
    - You will remain on the Review page and the Wizard will be shown as **Submitted** (in this case data from the Wizard has been submitted for purposes other than creating a record).

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

Tracking Wizard Activity

When a Wizard results in the creation of an Object record (such as an Agreement), a note is automatically added to the Notes & Attachments Related List of the created record identifying which Wizard originated the record.

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

To track wizard activity from a record

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

Notes & Attachments			New Note	Attach File	View All
Action	**Type**	**Title**			**Last Modified**
Edit | Del	Note	A - Business Wizard 1 Notes			11/24/2015 2:44 PM

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

Note
A - Business Wizard 1 Notes

Note Detail   Edit   Delete

Note Owner	
Related To	a01A000000NfV53
Private	☐
Title	A - Business Wizard 1 Notes
Body	This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU
Created By	11/24/2015 2:44 PM

Edit   Delete

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

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

Accessing the Preview Sidebar

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

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

Using the Preview Sidebar

1. Launch a new Wizard from the Wizards tab. The runtime Wizard is displayed with the Preview Sidebar in collapsed view.
2. Click the sidebar to expand it. You will see one of two possible views:
    - If you are running a linear, step-by-step Wizard with no conditionally-shown steps, you will be able to see and navigate to any step in the Wizard.
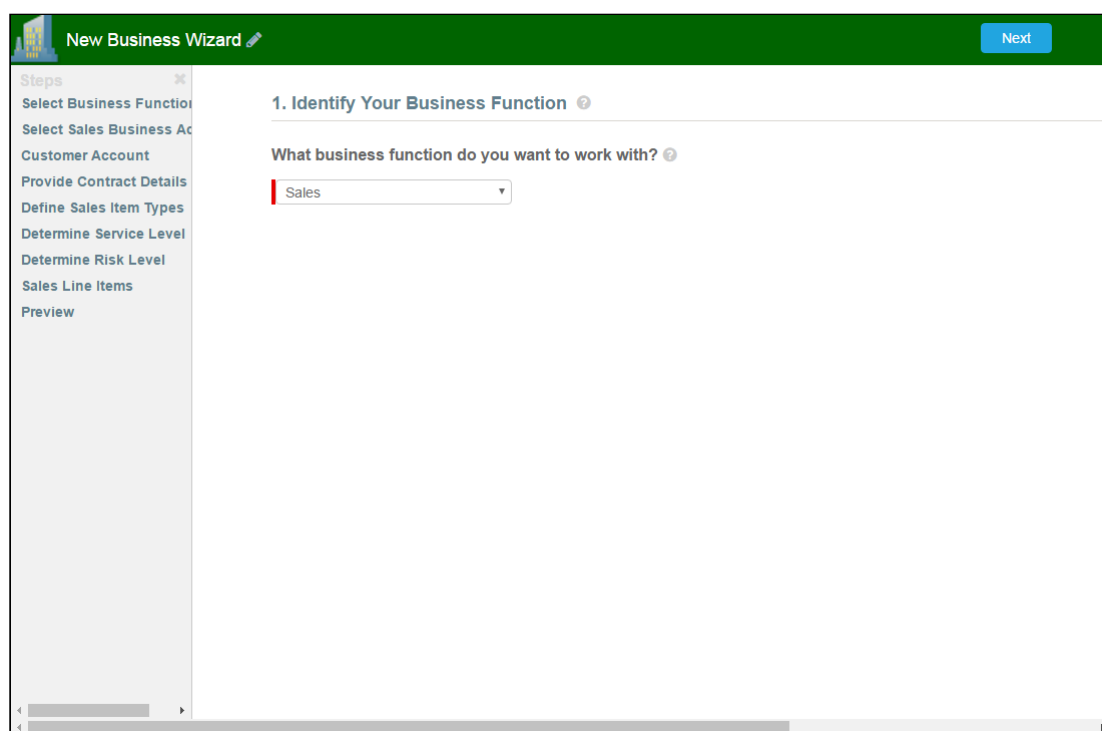
- If the Wizard you are running contains any conditional steps, you will only see the current step and the "Preview" step. The preview sidebar will display additional steps as you complete the current step and conditions are satisfied to include the other steps in the Wizard.

3. Click any step in the preview sidebar to preview it. **Important Note:** if you attempt to view a future step but the current step contains any required fields, you cannot preview that step until you have completed the required fields in the current step.

4. Click **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.

5. Click **Back** to return to the last step you worked with.

Use Case for Running Contract Wizard

This topic describes the use case for contract wizard.

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

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

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

Pre-requisite: Make sure you have the following:

- New inputs are created
- Steps are created

To Run a Contract Wizard

To run a Contract Wizard, perform the following steps:

1. From the Salesforce application menu, choose **Contract Wizard**. The application displays the Home tab and the **Wizards** tab (you will see additional tabs if you have permissions to create Wizards).
2. Choose a Wizard to run from the drop-down list of designs and click **Go**.

   > ⓘ **Note**
   >
   > Wizards associated with deactivated or retired Wizard designs will not be available in this list. Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

3. **(Optional)** Click the pencil icon in the displayed banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.
   The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.
4. Move through the steps of the Wizard, choosing values for the fields in each step. Click **Next** when you are finished with a step to move to the next step. Click **Back** to return to the previous step. Click **Save** to save the data on the current wizard page.

   > You must fill in all the required fields on the current wizard page before clicking **Save**; otherwise, the Wizard will throw validation error message.

   When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option. For example, in the following step, when you choose **Sales Contract** as the business activity and **Create** as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.

5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), and/or click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the **Notes & Attachments** Related List of the new record along with the recorded comments. To add an attachment:
   a. Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.
   b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.
   c. Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.
6. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses, for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract.
7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see Using the Wizards Tab).
8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.

9. Click **Edit** to change your answers for any steps in the Wizard. A dialog box warns that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.
10. Click **OK** to edit the step or **Cancel** to return to the Review page.
11. When you are satisfied with your responses, click **Submit.**
    Depending on the design of the Wizard, one or more of the following will occur:
    - A record of the type determined by your inputs within the Wizard is created (e.g., a Sales Agreement record).
    - You are redirected to the record details page of the record just created by the Wizard.
    - You are redirected to another page in Salesforce.
    - You remain on the Review page and the Wizard shows as **Submitted** (in this case data from the Wizard has been submitted for purposes other than creating a record).

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

Reports and Dashboards

Salesforce delivers standard report folders containing reports for each record type. For example, Accounts, Opportunities, Leads, and more. These reports are used as a starting point for your organization's reporting efforts. Salesforce allows all users to run, customize, and create reports. For more information on setting up and managing reports within Contract Management, see salesforce.com information related to creating and customizing reports. provides a set of out-of-the-box reports. You may create new reports or customize existing reports. To modify an existing report, run the report and click Customize. For more information, see Create a custom report.

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

About Agreement Explorer Reports

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

This feature complements standard reporting views to satisfy the demands of many customers who require more powerful, specific search results and related exports to Excel to satisfy their business needs. Agreement Explorer expands your access to agreements by providing reusable searches with configurable fieldsets and filtered lists for multiple contexts associated with agreements. You can use these reports to discover and expose record lists for agreement searches, the hierarchies of agreements and accounts, and a combination of account hierarchies and the individual account's related agreement hierarchies. Users can create published lists of available reports, which can then be complemented by users creating and saving their own public or private ad hoc reports. The resulting reports can be exported to Excel.

Understanding Agreement Explorer Report Types

The key to understanding how to create and use Agreement Explorer reports effectively is to understand the application types assigned to each report. When you create an Agreement Explorer report as an administrator, you are required to define the context (type). The type determines the list of records and hierarchy displayed in the results available to the user. There are *three types* available for reports:

Report Type	Report Location	Description
Agreement Search	Agreement Explorer Tab	Returns a filtered list of agreement records. For example, return all the agreements filtered by Status Category and Status. These results do NOT display Agreement Hierarchy.
Agreement	Agreement Record, Agreement Explorer Tab	Returns a filtered, hierarchical list of agreements with the current record highlighted. Records in this list represent a hierarchy of parent and child agreements with the current record as context.
Agreement Hierarchy by Account(s)	Agreement Record, Account Record, Agreement Explorer tab	Returns a filtered, hierarchical list of agreements associated with one or more chosen account records. Records in this list represent a hierarchy of parent and child agreements for all specified accounts.

Creating an Agreement Explorer Report

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

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

To create an agreement explorer report

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

To define Report Attributes

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

Consult the following table to define or edit the attributes for your Agreement Explorer report. Attribute fields in **bold** are required.

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

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

To define Report Field Sets

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

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

Field Sets

Col	Field	
1	Agreement Name ▼	
2	Account ▼	━
3	Account ▼	━
4	Account ▼	━
5	Account ▼	━
6	Account ▼	━

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

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

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

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

Field	Description of Action	Report Type
Agreement Hierarchy	Click on **Agreement Hierarchies** to navigate to the default Agreement Hierarchy report for the agreement of context.	Agreement Search

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

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

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

To define Report Filter Settings

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

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

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

Field	Description
Operator	Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains." <table><tr><td>**Datatype**</td><td>**Operator**</td></tr><tr><td>Account lookup</td><td>equal to; not equal to</td></tr><tr><td>Date, Number, Currency</td><td>equal to; not equal to; greater than; less than; greater than or equal to; less than or equal to</td></tr><tr><td>Text</td><td>starts with; equal to; not equal to; contains; does not contain</td></tr></table>
Value	Enter the value to be met for the condition expression. In the example above, you would enter "MSA."

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

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

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

4. When you are finished configuring the Filter Set, click **Save** to save your report. The application refreshes to display the Agreement Explorer tab.

Running Agreement Explorer Reports

Depending on the context of the search, you can use the Agreement Explorer tab to run reports to find agreements and their respective hierarchies. Each context has a default search defined by an Administrator which can be run from the Agreement Explorer tab (or in the case of Agreement hierarchy, from an individual agreement or account record page). Individual searches differ based on **Field Sets** and **Filter Sets** configured when the search was created or modified in an ad hoc fashion at runtime.

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

Running Agreement Search Reports

This feature lets you run the default agreement search report.

To run the default agreement search report

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

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

To Run a Custom Saved Agreement Search Report

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

1. Navigate to the **Agreement Explorer** tab.
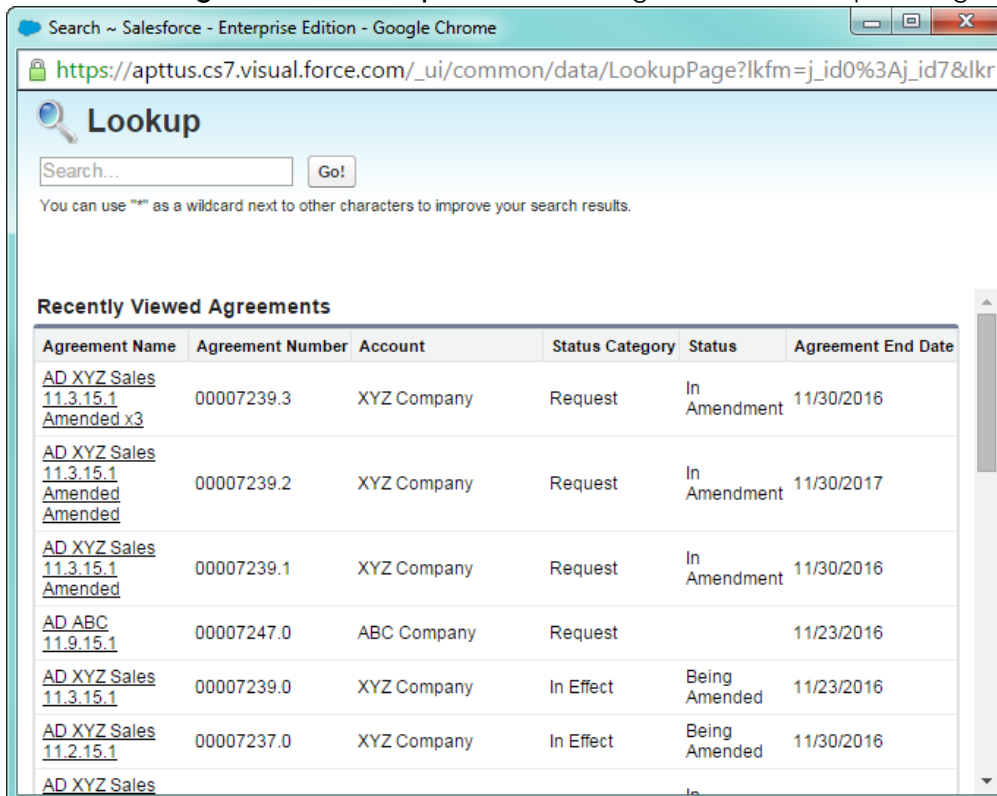
2. Click on a link in the Saved Reports table with the Agreement Search as context. The report listing all Agreement records that match the settings for that specific report is displayed.
3. You can take several actions from the resulting report list. See Using Agreement Search Reports for a description of these actions.

Running Agreement Hierarchy Reports

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

To run an agreement hierarchy report

1. Navigate to **Agreement Explorer** tab.
2. Click the link in the Saved Reports table marked as **Default**. The Agreement Search screen is displayed.
   No results are displayed initially because no agreement record has been chosen as context. All Filter Sets are displayed in the Search Settings and you can preview Field Sets by clicking **Edit Fields**.
3. Click on the **Agreement Lookup** 🔍 icon. An agreement Lookup dialog is displayed.

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

5. Click **Go** to run the report. The report listing the Agreement hierarchy for your agreement record is displayed, filtered to match the default Agreement report settings and display the data according to the defined field sets (columns). Records that do not match the filter settings for the report are grayed out (you can still click the links).

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

To Run the Default Agreement Hierarchy Report for a Specific Record

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

context is highlighted in the list.

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

To Run a Custom Agreement Hierarchy Report

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

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

Running Agreement Hierarchy by Accounts Reports

To Run the Default Agreement by Accounts Report for One or More Accounts

1. Navigate to **Agreement Explorer** tab.
2. Click the **Title** link in the Saved Reports table marked as **Default**. The Agreement Search screen is displayed.
   No results are displayed initially because no account records have been chosen as context. All Filter Sets are displayed in the Search Settings and you can preview Field Sets by clicking **Edit Fields**.
3. Click the **Account Lookup** 🔍 icon. A dialog opens displaying a list of all Accounts you have permission to view organized into a hierarchy of parent and child accounts by default.
4. To view the accounts in alphabetical order click **Sort by Name**. This opens the account list in the alphabetical order. As soon as the alphabetically sorted list is displayed, the button toggles to **Show Hierarchical**.
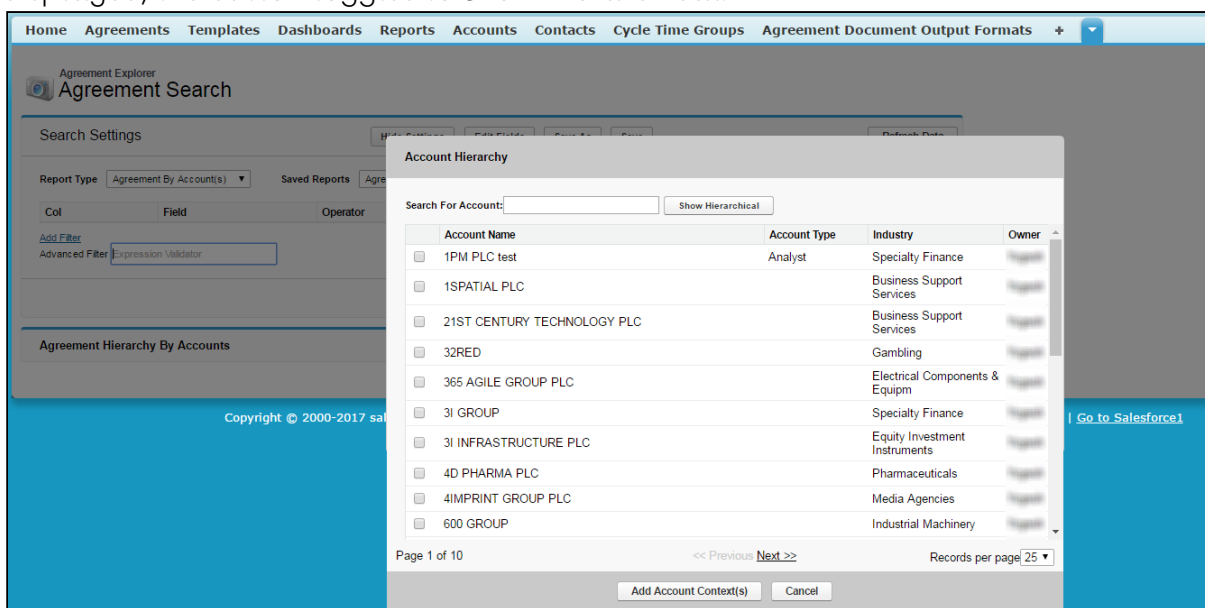
To view the accounts list again in hierarchical form, you can click **Show Hierarchical**.
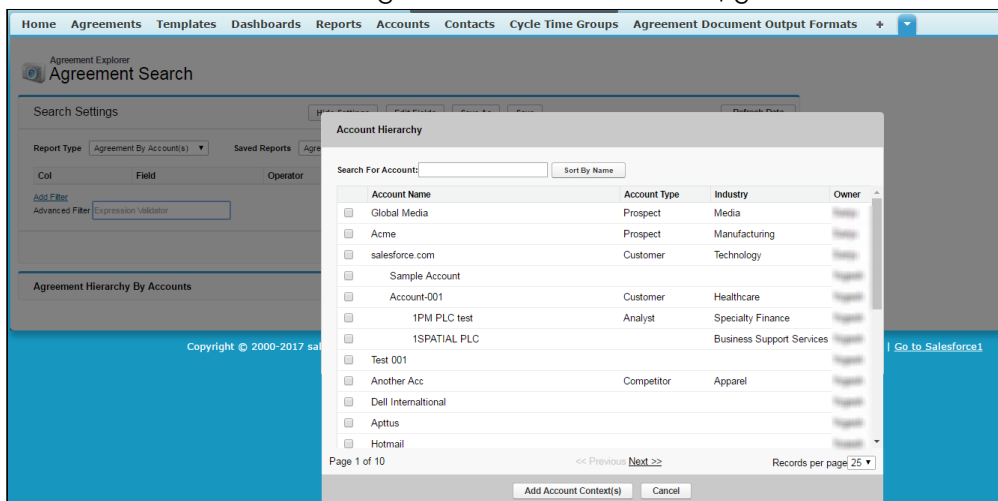
The Sort by Name and Show Hierarchical are toggle buttons.

5. You can also search a particular account by entering the account name as search string in the **Search For Account** field. The account results displayed are sorted alphabetically by default.
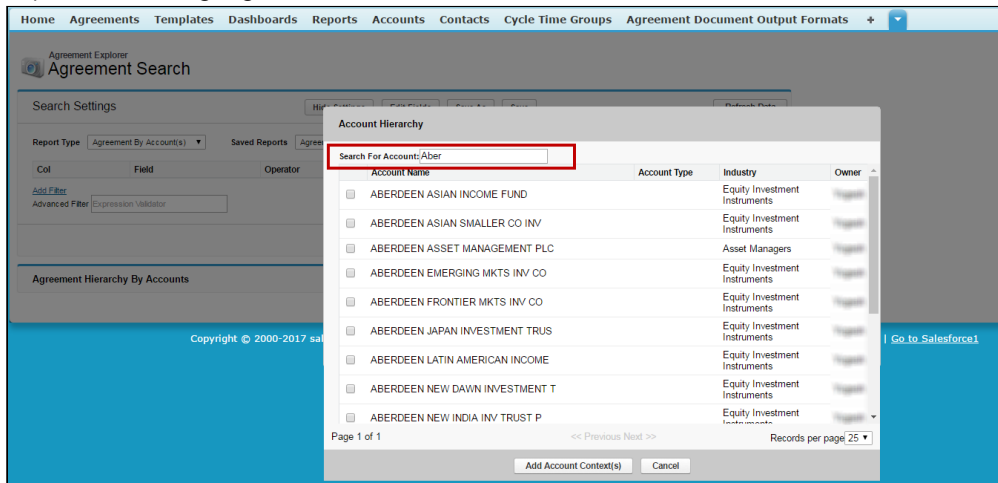
6. Select the check box next to one or more Accounts in the list and click **Add Account Context(s)**.

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

account record of context are highlighted in blue.

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

To Run the Default Agreement by Account(s) Report for a Specific Account

1. Do one of the following:
    a. Navigate to the **Accounts** tab. Search for or click the link to view a specific Account record. The Account record is displayed.
       (screenshot here)
    b. Navigate to the **Agreements** tab. Search for or click the link to view a specific Agreement record. The Agreement record is displayed.
2. Click the V**iew Agreement Hierarchy for Account** button. The resulting list displays full agreement hierarchies associated with the account of context (either the Account record from 1a. or the Agreement Account from 1b). The report uses the default Agreements by Account report settings and fieldsets. Records which

match the account record of context are highlighted in blue.

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

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

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

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

Working with Report Results

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

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

Report Limits

Agreement Explorer report results are subject to the following limits:

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

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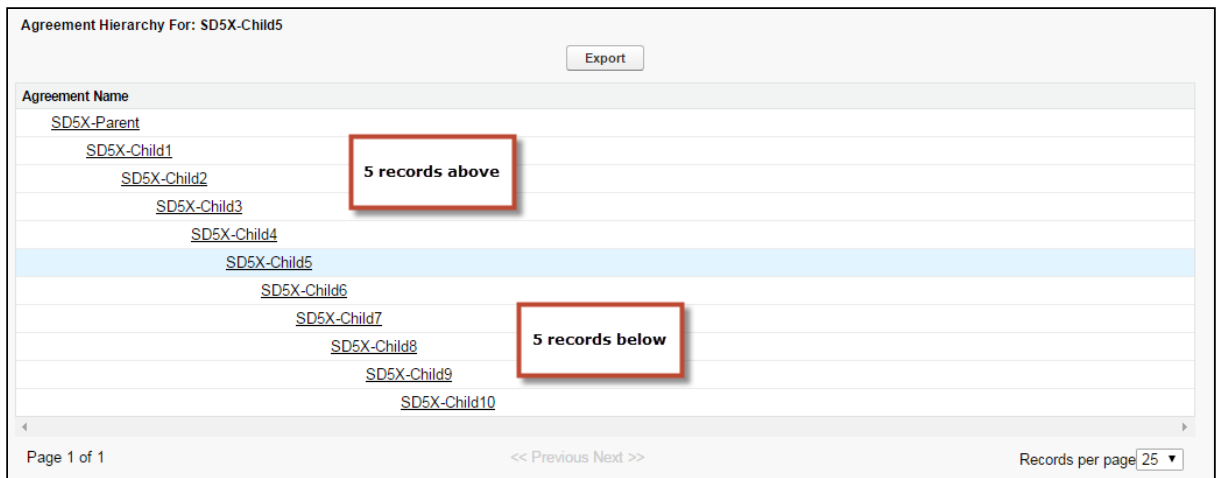
For more information on modifying reports, see Managing Report Settings.

Using Agreement Search Reports

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

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

- From the Agreement Explorer tab:
    - the administrator-defined default report for Agreement Search
    - a public Agreement Search report created by yourself or another user
    - a private Agreement Search report created by yourself
- By editing **Search Settings** from an existing report.

Taking Actions from Report Results

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

Action	Description
View Agreement Record	Click on a record link under Agreement Name to open the corresponding Agreement record page in a new tab.
View Account Record	Click on a record link under Account to open the Account record page for the Account associated with the corresponding agreement in a new tab.
View Agreement Hierarchy	Click on a record link under Agreement Hierarchies to navigate to the default Agreement Hierarchy report for the corresponding agreement. See Using Agreement Hierarchy Reports for more information.

Action	Description
View Related To Agreements	Click on a View To Agreements link to view a list of all agreements which are Related To the corresponding agreement. All listed agreements are a source or reference to create or associate the current record (e.g., renewed from, amended from). These results do NOT display Agreement Hierarchy. See Viewing Related To Agreement Reports for more information.
View Related From Agreements	Click on a View From Agreements link to view a list of all agreements which are Related From the corresponding agreement. All listed agreements are created or associated from the current record (e.g., renewals, amendments). These results do NOT display Agreement Hierarchy. See Viewing Related From Agreement Reports for more information.
Export	Click Export to export all report results to a Microsoft Excel spreadsheet. Note: Any records which do NOT match Filter Sets (grayed out) will not be included in the export.
Show Settings Hide Settings	Click Show Settings/Hide Settings to expand/collapse the Search Settings section. You can use Search Settings to edit the filter settings to change the list of results based on context type, a saved search (with its own settings) and filter expressions. Click Hide Settings to collapse the Search Settings section. See Managing Report Settings for detailed instructions on how to use Search Settings.
Edit Fields	Click Edit Fields to change the fieldset (columns) displayed when the current report is executed. When you add Agreement Hierarchy, Related To Agreement and Related From Agreement to a fieldset those actions become available for records listed in the report. See Managing Report Settings for detailed instructions on how to edit fieldsets for a report.
Back to Root Report	Click this link to return to the first set of results generated when the report was originally executed.
Show 5 more	Click this link at the bottom of the report listing to view additional returned records. You can also use page navigation to navigate between pages of the report.

Using Agreement Hierarchy Reports

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

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

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

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

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

Taking Actions from Report Results

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

Action	Description
View Agreement Record	Click a record link in the hierarchy to open the corresponding Agreement record page in a new tab.

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

Action	Description
Show 5 more	Click this link at the bottom of the report listing to view additional returned records. You can also use page navigation to navigate between pages of the report.

Using Agreement by Accounts Reports

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

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

You execute an Agreement Hierarchy by Account(s) report in one of the following ways:
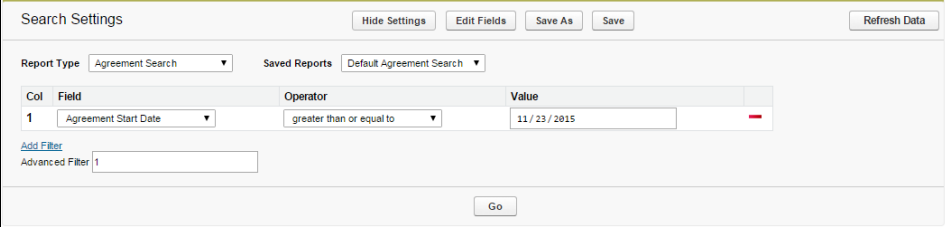
- from the Agreement Explorer tab:
    - the administrator-defined default report for Agreement Hierarchy by Account(s)

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

Taking Actions from Report Results

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

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

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

Managing Report Settings

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

- the Search Type (e.g., Agreement Search, Agreement Hierarchy or Agreement Hierarchy by Account(s))
- the individual Agreement Explorer report's Field Sets (sequenced columns displayed in the report)
- Agreement Explorer Filter Settings (displays report results based on simple or advanced expressions)

The following topic describes how to edit report settings after running any report for which you have access.

To edit the settings for any report

1. Run the report.

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

Use the following links to quickly jump to a task:

- To edit the settings for any report

To Change the Saved Report Type

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

To Change the Report Type to Agreement Search

1. Click on the **Type** drop-down menu and choose **Agreement Search**.
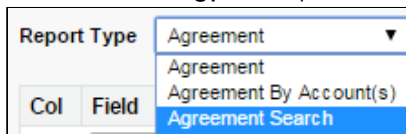
2. Click **Go**. The report listing is refreshed to display a list of agreements according to the current filter settings and fieldsets defined for the report. Any agreement or account lookup field is removed from the settings view.

To Change the Report Type to Agreement

1. Click on the **Type** drop-down menu and choose **Agreement**.
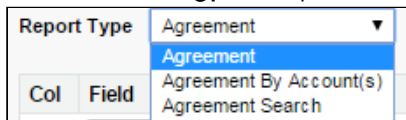
Search Settings are refreshed to display the **Agreement Lookup** field.

2. Click on the **Agreement Lookup** 🔍 icon to display a lookup dialog for agreement records.
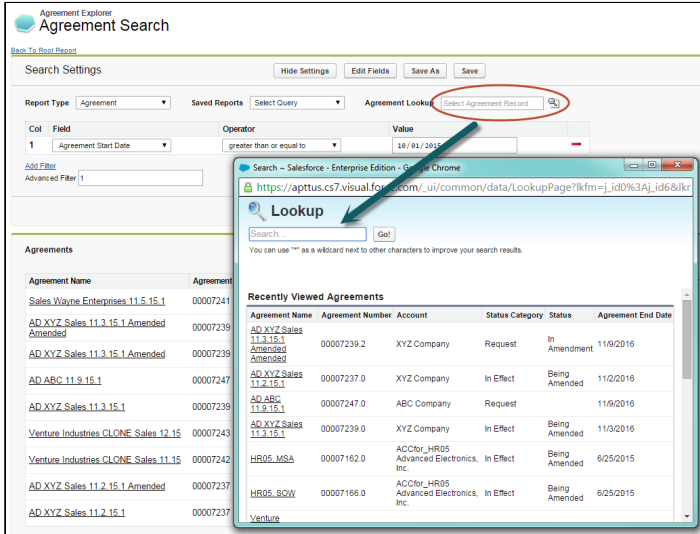
3. Search for and click on an **Agreement Name**.
4. Click **Go**. The report listing is refreshed to display a list of agreement records organized into a hierarchy according to the filter settings and fieldsets defined for the report. The specific record chosen in the previous step is highlighted in the list.

To change the report type to Agreement Hierarchy by Account(s)

1. Click the **Type** drop-down menu and choose **Agreement by Account(s)**.
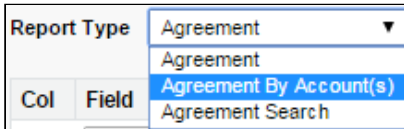
    Search Settings are refreshed to display an **Account** lookup field.
2. Click the **Account Lookup** 🔍 icon to display a lookup dialog of accounts organized in a hierarchy.
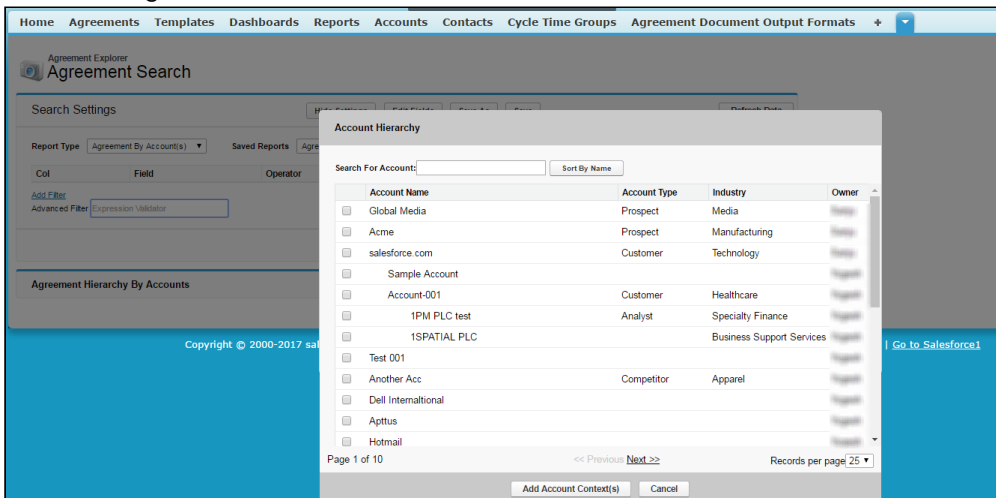
3. Click **Sort By Name** toggle button (shown above), to view the alphabetical list of accounts in the Account Hierarchy window. To switch back to the hierarchy view, click **Show Hierarchical** button (shown below.)
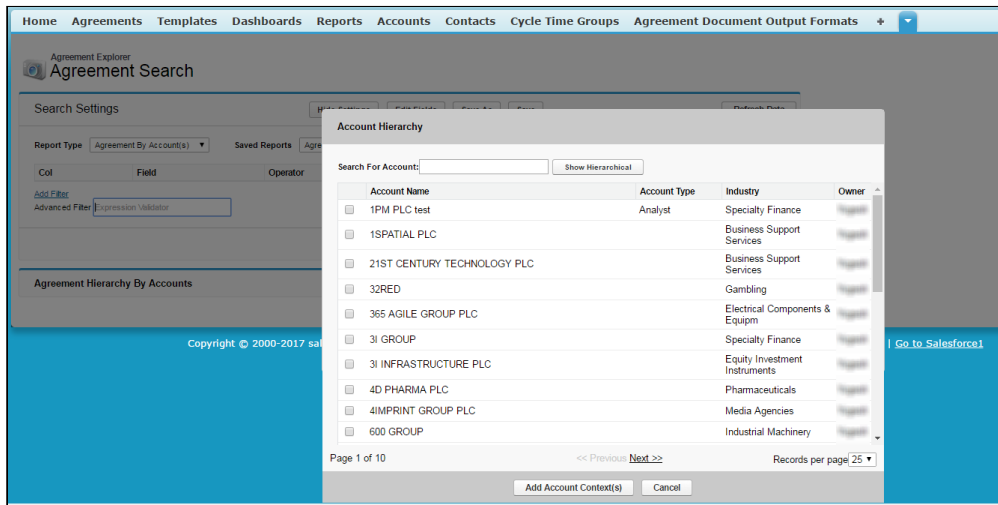
4. You can also search Agreement Accounts by searching the account name as a search string in the **Search For Account** field in the Account Hierarchy window. The result displays account names sorted alphabetically.
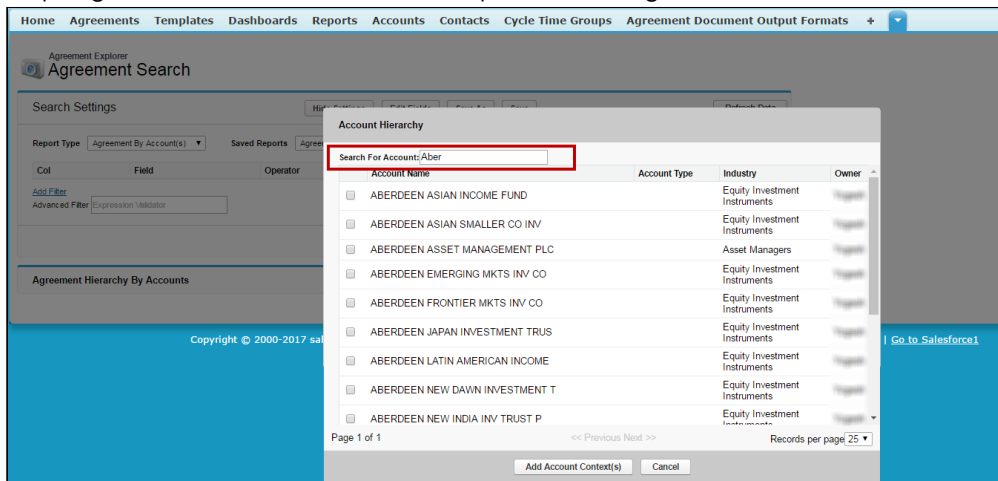
5. Select one or more Accounts from the list and click **Add Account Context(s)**.
6. Click **Go**. The report listing is refreshed to display a hierarchy of agreements organized by the account(s) specified using the current filter and fieldsets defined for the report.

To run a saved Agreement Explorer report

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

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

1. Change the current Agreement Explorer context type as described in the previous section.
2. Click the **Saved Reports** drop-down menu and choose a saved public or private report. Filters and fieldsets are changed based on saved settings for the selected report.
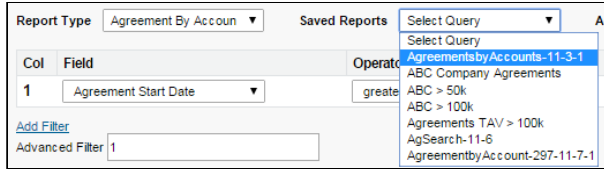
3. Click **Go.** The report listing is refreshed to display an Agreement Explorer report that matches the chosen saved report.

To Edit Fields Displayed in a Report

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

> ⓘ   FieldSets in Agreement Explorer reports are always defined explicitly for each report and change depending on settings for a specific report.

1. From any report listing, click the **Edit Fields** button at the top of the page. The *Edit Fields* dialog is displayed, showing the current fieldset used for this report.
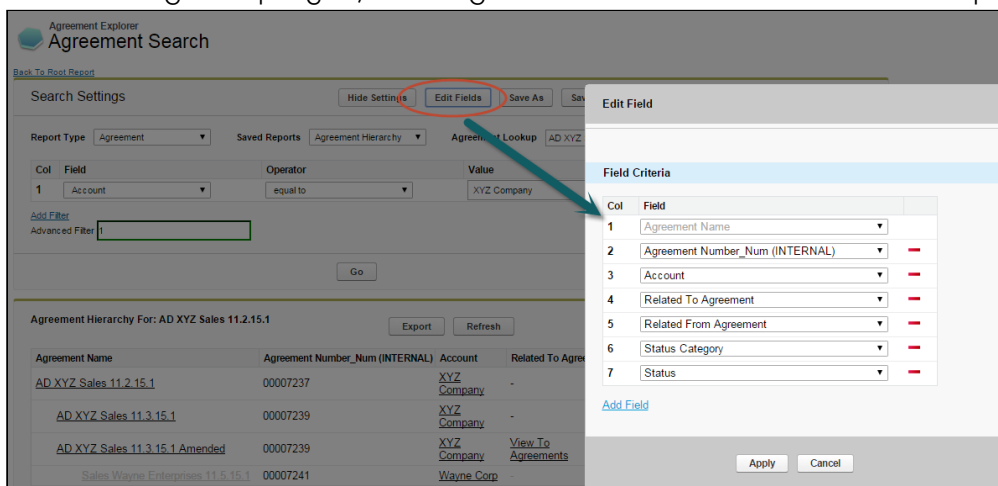
Individual fields are listed in sequence by column number. "Agreement Name" is always the first field in the fieldset and cannot be removed or reordered.

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

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

Field	Description of Action	Agreement Explorer Context Type
Agreement Name	Click on Agreement Name to open the corresponding agreement record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Account	Click on Account name to open the corresponding account record in a new tab.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related TO Agreement	Click **View To Agreements** to change the report view to a list of agreement records related to the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)
Related FROM Agreement	Click **View From Agreements** to change the report view to a list of agreement records related from the agreement of context.	Agreement, Agreement Search, Agreement Hierarchy by Account(s)

Field	Description of Action	Agreement Explorer Context Type
Agreement Hierarchy	Click on **Agreement Hierarchies** to navigate to the default Agreement Hierarchy report for the agreement of context.	Agreement Search

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

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

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

To Change Filter Settings for a Report

Agreement Explorer report results can be constrained through the use of Filter Sets defined for any given report. When you first run an Agreement Explorer report, the report listing is displayed based on the defined Filter Set. You can change these Filter settings to return specific results based on a set of expressions you build.

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

Any already existing Filter Sets are displayed in this section.
2. Define or change Filter Sets to filter the report based on the criteria you specify.

Field	Description
Field	Choose a field from an alphabetical list of fields available for the Object (including lookup fields). For example, if you want to filter the agreement records where Agreement Name contains "MSA," select Agreement Name from this drop-down list.
Operato r	Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains."

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

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

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

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

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

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

To Refresh Agreement Data for a Report

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

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

3. Return to the **Agreement Explorer** tab or Agreement or Account record and run the report.

> ⚠ Alternatively, the Contract Management administrator can schedule a job using the Apex Scheduler to refresh data such as agreement hierarchy and account hierarchy. For more information, see Schedule Jobs to Refresh Agreement Data.

To save Edits to report settings

When you edit report settings, you can run reports in an ad hoc fashion without saving any changes to the existing report by changing settings as described in the previous sections. Agreement Explorer also gives you the option to save edits you have made to an existing report, or to save edits as a new report.

1. Add, remove or change Filter settings for the report, including changing the context type of the report.
2. Add, remove or change the order of Field Sets for the report.
3. Click **Go** to run the report using any new Filter or Field Set settings.
4. Click **Save** to save your changes. Settings are changed for the existing report. You can only save changes to an existing report if you own the report (private).
5. Click **Save as** to save your changes as a new Agreement Explorer report.

a. Make changes as needed in the **Save Report** dialog box.
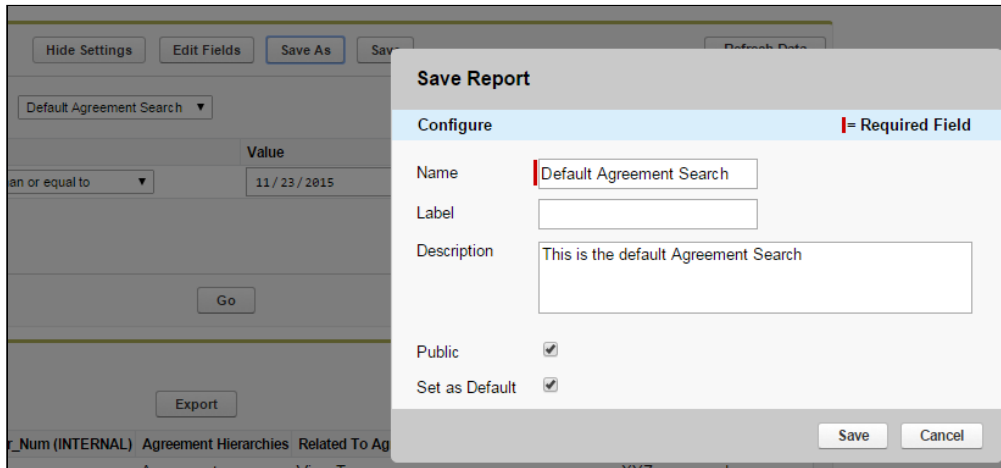
b. Click **Save**. A new Agreement Explorer report is created using the new report settings and the details you specified.

Viewing Related To Agreement Reports

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

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

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

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

Field	Description
Agreement Name	Click the Agreement Name to open the corresponding related agreement record in a new tab.
Agreement Number	The agreement number of the related agreement record.
Agreement Hierarchy	Click **View Hierarchy** to run display a hierarchy report for the related agreement record using administrator-defined default report settings.
Account	Click the Account name to open the related agreement's account record in a new tab.
Relationship	The relationship of the related record with the original agreement record.
Status Category	The Status Category of the related agreement record.
Status	The Status of the related agreement record.

Click **Export** to export the Related To Agreements report to an Excel spreadsheet.

You *cannot* save a Related To Agreement report as an Agreement Explorer report.

Viewing Related From Agreement Reports

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

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

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

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

Field	Description
Agreement Name	Click on the Agreement Name to open the corresponding related agreement record in a new tab.
Agreement Number	The agreement number of the related agreement record.
Agreement Hierarchy	Click **View Hierarchy** to run display a hierarchy report for the related agreement record using administrator-defined default report settings.
Account	Click on the Account name to open the related agreement's account record in a new tab.
Relationship	The relationship of the related record with the original agreement record.
Status Category	The Status Category of the related agreement record.
Status	The Status of the related agreement record.

Click **Export** to export the Related From Agreements report to an Excel spreadsheet. You *cannot* save a Related From Agreement report as an Agreement Explorer report.

Deleting an Agreement Explorer Report

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

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

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

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

Conga CLM on Salesforce Lightning

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

Enabling the Lightning Experience in Salesforce

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

Accessing Features in Lightning

One of the main differences you will find when you switch to Lightning is how your apps are accessed, like Contract Management. In Lightning, there is no Force.com app menu, and you cannot customize the default Tabs to include Custom Objects or Visualforce tabs. Instead, you access all Contract Management features by using the App Launcher.

1. Log in to Salesforce with Lightning enabled.
2. Click the **App Launcher** button in the upper left-hand corner of the Home screen.
3. From the App Launcher, click on **Contract Management**.
4. Select a Contract Management feature to work with (e.g., "Agreements" to start the agreement creation process.)

Creating an Agreement in Lightning

There are two ways to create a new agreement in the Lightning experience.

1. Go to **App Launcher > Contract Management**.
2. Click on **Agreements**.
3. From the Agreements List, click **New**.
   OR

Click the down arrow ∨ next to the Agreements tab and click **+New Agreement** from the drop-down menu.

4. Select an Agreement Record Type and click **Continue**.

5. On the New Agreement page, enter values for required fields and any optional fields that are available and click **Continue**.

> ⚠ It is recommended when using the Lightning Experience to configure the above page to contain as many fields as you want specified prior moving to the next step. You can configure which Agreement fields are available on this page by editing the **Agreement New Field Set**. For more information, see Creating an Agreement.

6. Click **Edit** to make more changes to your agreement record, or the pencil icon 🖉 to make changes to any editable field. Note that all the field values you had entered on the previous page, have already been saved to the record.

7. Scroll down the page to find Agreement Actions such as **Preview, Generate,** and **Import Offline Agreement**. Any Visualforce pages you have added to the page layout, such as **Document Finder** or **Master Agreement Clauses** are also displayed on this page.

   The agreement actions can also be accessed from the Agreement Actions panel on the right side of the Agreement Details page. The panel shows the action buttons clustered into three groups. The Agreement Life Cycle Actions group contains Submit Request, Send for Review, Send for Teams Review, Send for Signature, Activate, Cancel, Renew, Terminate, Amend, Send for Adobe Sign, Send for DocuSign, and Expire actions. The Document Actions group contains Generate, Regenerate, Import Offline Document, Preview, Merge Documents, Generate Supporting Document, Upload Signed Document, Review Offline, and Import Supporting Document actions. The additional actions group contains Agreement Hierarchy, In Effect, and custom actions. For more information on customizing action panel, see Enabling and Customizing the Action Panel. The action buttons are displayed according to the agreement status and status category.

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

Contract Wizard in Lightning

Use the Contract Management Contract Wizard to run custom, user-friendly Wizards based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). These Wizards are intended to be used by sales representatives, purchasing agents, HR managers, and other users to quickly create their own records by entering responses to criteria-based inputs that follow a logical series of steps. Wizards can also be used to collect data from customers to be posted to internal systems or for other business use.

Use the Wizards tab to run Wizards from the existing Wizard Designs. You can easily search and select from Wizard designs to create well-formed records. Wizards also contain a feature that allows users to review their responses prior to submission, returning to previous steps to make changes or corrections. Users can also use the tab to resume completion of in-progress Wizards or review completed or aborted Wizards.

For information on creating Wizards using the Wizard Designer, see Contract Wizard.

Running Wizards in Lightning

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

To run a Wizard

1. Navigate to the Wizard Launcher tab.
2. Click ⟩⟩ .
   This launches the wizard.
3. (**Optional**) Click the pencil icon (✏) to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.
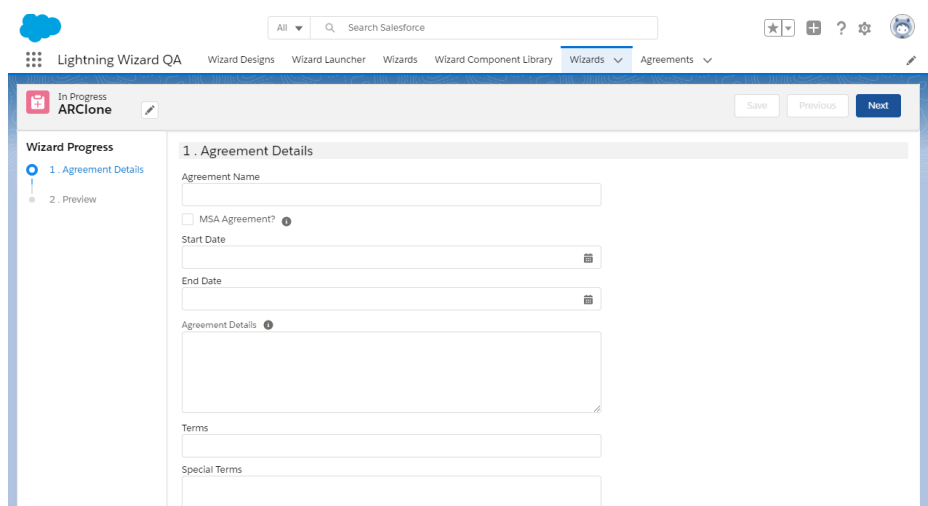
The new name for your Wizard is displayed in the In Progress tab of the Wizard Launcher tab.

4. Move through the steps of the Wizard, choosing values for the fields in each step. Click **Next** when you are finished with a step to move to the next step. Click **Previous** to return to the previous step. Click **Save** to save the data on the current wizard page.

> ⓘ **Note**
>
> You must fill in all the required fields on the current wizard page before clicking **Save**. If a lookup field is configured in the wizard design, it will appear as a search field in the wizard.

5. Some Wizard steps may include the option to add attachments in addition to providing traditional responses. To add an attachment:

   a. Click the **Add/Remove Attachments** link. This displays the Add Attachments window.

   b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Upload window.

   c. After the attachment is uploaded, click **Done**.

   d. Repeat the previous steps for each attachment you need to add.

   e. Click **Save**.

   The attached files are added to the Notes & Attachments Related List of the new agreement record and a new document version is created for each attachment. The attachments are added to the Document version if the object record is agreement.

   > ⓘ After uploading documents, you can see the number of documents uploaded beside Add/Remove Attachments. When you hover over Add/Remove Attachments, you can see the list of uploaded documents.

> If you have an 'Import Offline Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Agreement Document. If you have an 'Import Supporting Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Supporting Document.
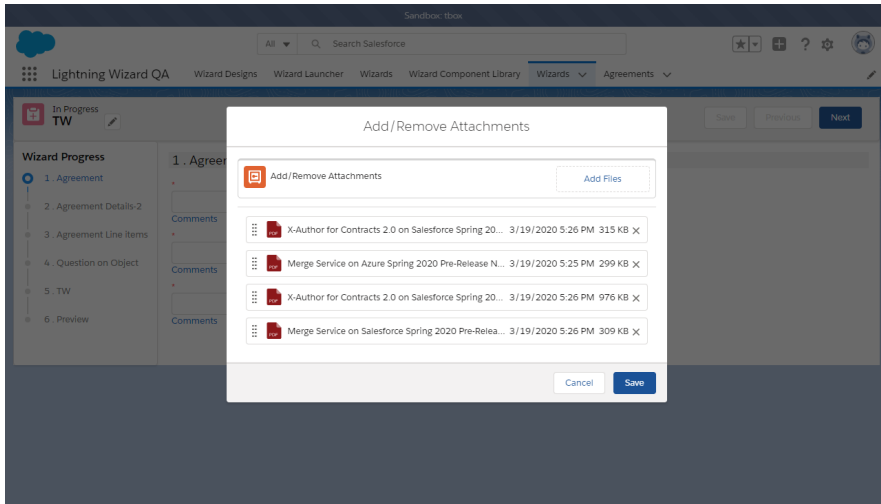
6. Some Wizard steps may include the option to add comments in addition to providing traditional responses. To add a comment:
   a. Click the **Comments** link. This displays Comments window.
   b. Enter a comment and click **Save**.

   > ⓘ When you enter a comment for an attached document, you can see the comment icon. When you hover over the comment icon, you can see the added comment.
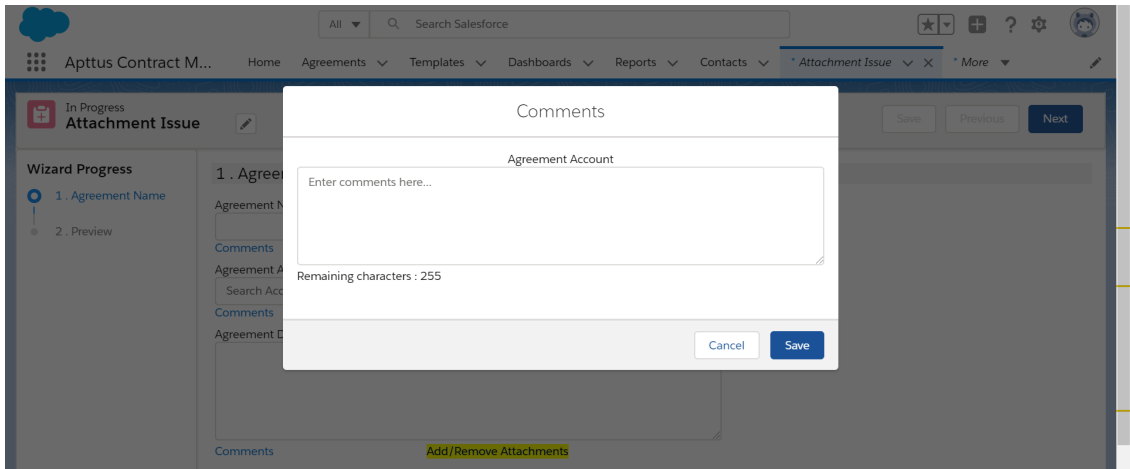
7. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses—for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.

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

9. Click **Edit** to change your answers for any steps in the Wizard.
10. When you are satisfied with your responses, click **Submit.** Depending on the design of the Wizard, one or more of the following will occur:
    • A record is created according to the Input Rules configured during designing a wizard.
    • You will be redirected to another page in Salesforce.
    • Depending on the rule configured for Submit in Wizard Design:
        • You will be navigated to the visual force page.
        • You will be navigated to the record detail page.

- You will be redirected to the created focus object on the record detail page.
- You will stay on the submitted wizard page:
  - If there are more than 2 focus objects defined and the submit rule is not defined.
  - If the wizard was not configured to create a record.

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

Limitations

1. You cannot launch Wizard with a static resource (image or CSS).
2. Salesforce Lightning limitation: The dependent picklist is displayed below the controlling picklist and not as per the order configured in the wizard design.

Working with Wizard Launcher in Lightning

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

Prerequisite

You must configure the Wizard Launcher tab to appear on the navigation menu. For more information see Adding Wizard Launcher Tab in Lightning.

To search for Wizards

1. Navigate to the Wizard Launcher tab.

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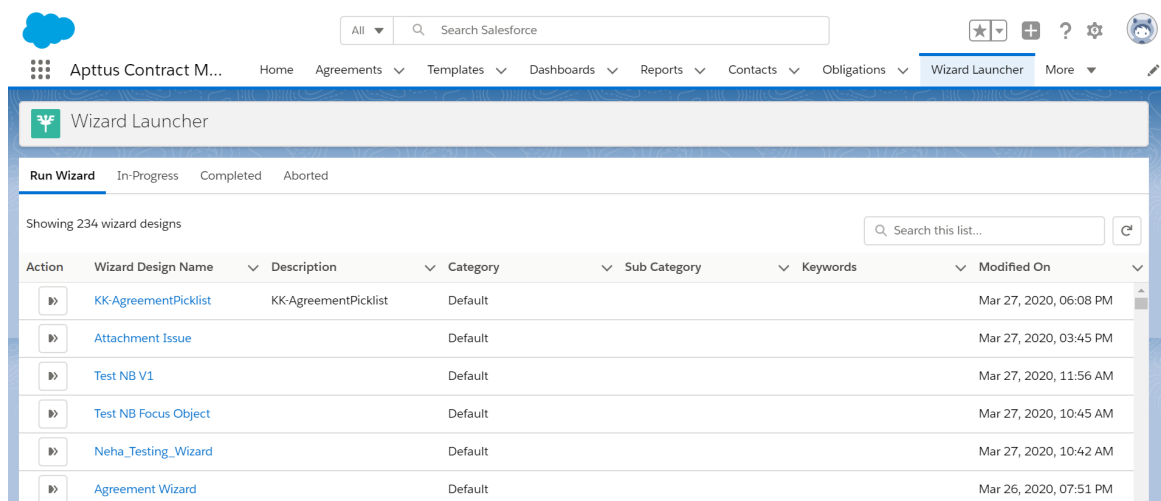
To continue an In Progress Wizard

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

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

To review a completed Wizard

You can revisit the Review page for a Completed Wizard.

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

Previewing Wizards in Lightning

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

- Preview a future step in the Wizard if you had previously navigated to that step.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

Using the Preview Progress Bar

1. Launch a new Wizard from the Wizard Launcher tab.
2. On the Progress Bar, you will see one of two possible views:
   - If you are running a linear, step-by-step Wizard with no conditionally-shown steps, you will be able to see and navigate to any step in the Wizard.

LWC Wizard

All ▾ | Search Salesforce

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

In Progress
TEST ✏

Save | Previous | **Submit**

Wizard Progress

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

Preview —

▾ 1 . Basic Agreement Information ✎ Edit

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

Do you wish to create an Agreement?
Yes

Total Agreement Values

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

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

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

What is the Subtype of this contract
Default

▾ 2 . Additional Agreement Information Required ✎ Edit

Agreement Name
Apttus Corporation Agreement 1234

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

Account Name
🏢 Apttus Software Ahmedabad ✕

Do you want to create line item?
Yes

Comments | Attachments

* Agreement Start Date
2020-03-26

* Agreement End Date
2020-03-31

▾ 3 . Product Information ✎ Edit

2 Items - Sorted by

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

▾ 4 . Miscellaneous Information ✎ Edit

Enter the Date of Trade Deal
03/28/2020

Does this contract contain Non Standard Legal Language?
true

Should this Agreement be Auto Renewed?
true

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

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

What is the Subtype of this contract
Default

Comments | Attachments

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

Owner Expiration
15 Days

What is the Division
Corporate

- If the Wizard you are running contains any conditional steps, you will only see the current step and the "Preview" step. The preview Progress Bar will display additional steps as you complete the current step and conditions are satisfied to include the other steps in the Wizard.

3. Click **Previous** to return to the last step you worked with.
4. After you have completed all the steps, the Preview page is displayed. Click the **Edit** button to navigate back to that step and update the required details.

Limitation

If a step has a two-column layout then that step is not displayed on the Preview page. For more information on how to configure a two-column layout in the wizard, see Creating Steps from the Wizard Designer.

Tracking Wizard Activity in Lightning

When a Wizard results in the creation of an Object record (such as an Agreement), a note is automatically added to the Notes & Attachments Related List of the created record identifying which Wizard originated the record.

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

To view wizard details in an agreement

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

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

Frequently Asked Questions in CLM

This topic provides information about the frequently asked questions in CLM.

Which special characters are not supported in the file name?

The unsupported characters in the file name include: **\, /, :, *, ?, ", <, >**, and **|**. If you add unsupported characters in the document generation workflow, the unsupported characters are automatically removed from the final document filename.

Appendix

Select one of the following topics for more information:

- Actions
- Supported File Sizes in Lightning
- Supported File Sizes in Classic
- Supported File Formats

Actions

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

Preview

Action	Preview Agreement
Description	Generates a *Draft* version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the MS-Word format. If more than one agreement template is set up, you are prompted to pick a specific template.
Availability	If Status Category = Request
Post Status	N/A

Comments	This action does not place the generated document in the Notes & Attachments related list.

Generate

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

Regenerate

Action	Regenerate Agreement
Description	Regenerates a new version of the agreement document from a selected template based on values from the agreement record. The regenerated agreement document is attached to the Notes & Attachments or Document Versions (if the document is Version Aware) related list. Because it is regenerated from template, any red lines made in previous version are not be carried into this version and must be manually applied.
Availability	If Status Category = In Authoring or In Signatures
Post Status	N/A
Comments	

Generate Supporting Document

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

Send for Review

Action	Send for Review
Description	Allows you to select one or more attachments from the Agreement record and from related parent/child agreements, select an email template, address the same, and send it out.
Availability	If Status Category = In Signatures or In Authoring
Post Status	Sets the status for an agreement to Other Party Review.
Comments	

Send for Signatures

Action	Send for Signatures
Description	Allows user to select one or more attachments from the Agreement record and from related parent / child agreements, select an email template, address the same, and send it out as a final copy for Signatures.
Availability	If Status Category = In Signatures or In Authoring
Post Status	Sets the status for an agreement to Other Party Signatures.
Comments	

Import Offline Document

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

Activate

Action	Activate
Description	• Marks the agreement as a finalized, executed agreement. • Prompts the user to select which attachment is the signed copy and records the same in activity history.
Availability	If Status Category = In Signatures
Post Status	Sets Status Category = In Effect, Status = Activated. If an Amendment or Renewal is being Activated, sets Status Category of Original Agreement to Amended or Renewed and Status to Superseded.
Comments	

Amend

Action	Amend

Description	Creates a new dot version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect
Post Status	Sets Status of Original Agreement to Being Amended, and Status Category of New Agreement to Request and Status to In Amendment
Comments	

Renew

Action	Renew
Description	Creates a new dot version of the Agreement (*nnnn.1, nnnn.2, and so on*) after doing a deep copy of the agreement fields and related objects.
Availability	If Status Category = In Effect
Post Status	Sets Status of Original Agreement to Being Renewed, and Status Category of New Agreement to Request and Status to In Renewal.
Comments	Agreement End Date must be in the past.

Expire

Action	Expire

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

Initiate Termination

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

Terminate

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

Cancel Request

Action	Cancel Request
Description	Voids an Agreement Request.
Availability	If Status Category = Request or In Authoring or In Signatures and Status <> Cancelled Request
Post Status	• Sets Status to Cancelled Request • If an Amendment is being Cancelled, sets Status Category of Original Agreement to In Effect and Status to Activated
Comments	

Supported File Sizes in Lightning

The following table lists the maximum file sizes you can upload for each use case when the Enable Files Comply System Property is enabled:

Use Case	File Size Limit
Add Attachments and Files	2 GB

Use Case	File Size Limit
Import Offline Document	• DOCX - 150 MB (with or without Intelligent Discovery) • DOCX - 10 MB (with Intelligent Discovery using Conga AI) ⓘ Extraction of large files is supported using Conga AI but the files take a long time during data extraction. • PDF - 200 MB (with Intelligent Discovery) • PDF - 1.8 GB (multiple files and without Intelligent Discovery) • PDF - 500 MB (single file and without Intelligent Discovery) • PDF - 10 MB (with Intelligent Discovery using Conga AI) ⓘ Extraction of large files is supported using Conga AI but the files take a long time during data extraction. ⓘ Refer send for review or parallel review supported file size for further processing the imported document.
Import Supporting Document	• PDF - 1.8 GB (multiple files) • PDF - 500 MB (single file) • DOCX - 150 MB ⓘ Refer send for review or parallel review supported file size for further processing the imported document.

Use Case	File Size Limit
Send for Review or Parallel Review	**Sending for review** • DOCX - 150 MB or 400 pages (whichever is the greater) **Reply to the review email with a single reviewed document** • DOCX - 10 MB **Reply to the review email with multiple reviewed documents** • DOCX - 25 MB (combined file size of reviewed documents) **Upload Reviewed Document** • DOCX - 150 MB
Send for Signature	**Sending for signature** • DOCX - 150 MB • PDF - 1.8 GB (multiple files) **Upload Signed Document** • DOCX - 150 MB (with or without Intelligent Discovery) • PDF - 200 MB (with Intelligent Discovery) • PDF - 1.8 GB (multiple files and without Intelligent Discovery)
Email agreement attachments or email in-effect view documents	2 GB
Merged documents	25 MB
Search agreement documents	• DOCX - 150 MB • PDF - 2 GB
Send for MS Team Review	10 MB (*Limited by MS Teams*)

Use Case	File Size Limit
Activate	• DOCX - 150 MB • PDF - 2 GB (multiple files) • PDF - 500 MB (single File)
Clone, Amend, Renew	• DOCX - 150 MB • PDF - 2 GB (multiple files) • PDF - 500 MB (single File) ⓘ Cloning, amending, or renewing agreements with large files impacts the storage space as duplicate copies of the large files are created.

Supported File Sizes in Classic

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

Use Case	File Size Limit
Uploading large files while importing or creating offline documents	10 MB *(Limited by* Force.com */ Classic-Apex)*
Importing an agreement document through Intelligent Import	200 MB (*Limited by Kira*)
Sending agreement documents for review, wet signature, or parallel review	10 MB (*Limited by Email template object*)
Emailing agreement attachments or emailing in-effect view documents	300 MB
Sending an agreement document for Microsoft Teams Review	10 MB (*Limited by MS Teams*)
Activating an agreement	15 MB (*Limited by* Force.com *governor limits while copying a file*)
Merging documents	25 MB

Use Case	File Size Limit
Searching agreement documents	10 MB
Uploading a document to Contract Management from KIRA (XAJS API)	25 MB

Supported File Formats

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

Feature	Supported File Formats
Generating or Regenerating an Agreement	DOC, DOCX, RTF, PDF, and PDF/A
Generating Supporting Documents	DOC, DOCX, RTF, PDF, and PDF/A
Sending an Agreement Document for Review	DOC, DOCX, RTF, PDF, and all file types that the Salesforce platform supports
Sending an Agreement Document for Parallel Review	DOCX
Sending an Agreement Document for Microsoft Teams Review	DOCX
Sending Agreement Documents for Signatures	DOC, DOCX, RTF, PDF, and all file formats that the Salesforce platform supports
Activating an Agreement	DOC, DOCX, RTF, PDF, and all file formats that the Salesforce platform supports
Importing an Offline Agreement	DOC, DOCX, RTF, PDF, and all file formats that the Salesforce platform supports
Storing an Executed Agreement	DOC, DOCX, RTF, PDF, and all file formats that the Salesforce platform supports

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

CLM for SOAP API Developers

This section describes the SOAP APIs provided by Conga CLM.

Topic	Description
What's Covered	This section walks an API user through the list of SOAP APIs provided by Conga.
Primary Audience	API developers.
IT Environment	Refer to the latest Conga CLMRelease Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CLM Documentation topic.

This section describes the following topics:

- Agreement Web Service
- Merge Web Service
- Author Web Service
- Callback Classes

Before using Conga CLM, you must be familiar with the following:

- Basic knowledge of Salesforce
- Basic knowledge of SOAP APIs
- Salesforce and Conga terms and definitions

If you are new to Conga Contract Management, begin here: Getting Started with CLM APIs.

Getting Started with CLM APIs

Select one of the following topics for more information:

- API Supported Packages
- Document Setup
- API Standards and Development Platforms
- Field Types
- Integrating Conga CLM with External Systems

API Supported Packages

Refer to the Conga CLM Release Notes for the package details of the latest release.

Document Setup

The Conga CLM API Reference section details the APIs that you can use to manipulate Conga CLM objects through API calls and passing parameters:

API Reference	The *API reference* section details the APIs that you can use to manipulate Conga CLM objects through API calls and passing parameters. The API reference section also includes some code samples.

API Standards and Development Platforms

Conga CLM APIs are based on Salesforce APIs and use the same standards and platforms.

Standards

Name	Reference
Simple Object Access Protocol (SOAP) 1.1	http://www.w3.org/TR/2000/NOTE-SOAP-20000508
Web Service Description Language (WDSL) 1.1	http://www.w3.org/TR/2001/NOTE-wsdl-20010315
WS-I Basic Profile 1.1	http://www.ws-i.org/Profiles/BasicProfile-1.1-2004-08-24.html

Development Platforms

Apttus SOAP API works with standard SOAP development environments. For a list of compatible development platforms, see Salesforce Developer Force API details.

Field Types

Conga CLM APIs use a subset of the supported data and field types on Salesforce.

The following table lists the APIs that Conga CLM provides. For a comprehensive list of all field types supported by Salesforce, see Salesforce Data Types.

Type	Description
Boolean	The **Boolean** field has a `true`(or 1) or`false`(or 0) value.
Data object	The **Data Object** field is an ID type and is represented by`CPQ.nnDO`in this document.
Date	The **Date** field contains date values only and do not contain relevant time values. Time in a date field is always set to midnight in the UTC time zone. If you want a timestamp you must use a **dateTime** field.
Decimal	The **Decimal** field provides an exact numeric value and you can arbitrarily size the precision and scale of the value.
ID	The **ID** field is an alphanumeric field that acts like the primary key for a specific record associated with an object. The ID value includes a three-character code that identifies which object the record is associated with. The ID for a specific record does not change. For some objects, this field may also be a`reference`type value, which contains the ID value for a related record. They are identified by field names ending in 'Id', such as`priceListId`. The ID field acts like foreign keys and their values can be changed using an`update()`call.
Integer	The **Integer** field contains whole numbers only. There are no digits after the decimal.
List	The **List** field includes a fixed set of values from which you must select a single value. Picklists are available as drop-down lists. If a picklist is unrestricted, the API does not limit entries to only currently active values.

Type	Description
String	The **String** field contains text and may have differing length restrictions based on the data you store in the specific field. For instance,`city`may be limited to 50 characters, while`AddressLine1`is limited to 255 characters.

Integrating Conga CLM with External Systems

Additional steps are required when you choose to integrate Conga CLM with external applications, customer portals, or other critical business systems. Because Contract Management Web Services are hosted on Salesforce, you should familiarize yourself with the Salesforce SOAP API and processes surrounding integration and best practices detailed here: https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_quickstart_intro.htm

> ⓘ **Best Practices**
>
> Conga recommends that you work with Conga Professional Services to design and implement your integration. Use this documentation for basic integration steps and to reference Contract Management Web Service calls.

The following basic steps are required to get started using the Conga CLM Web Services API.

1. **Generate the Enterprise or Partner WSDL** – Integration with data stored in Salesforce requires you to first point your browser to the Salesforce Enterprise or Partner WSDL. This WSDL is generally provided by Conga Professional Services. Refer to Salesforce Documentation for complete instructions on generating the Web Service WSDL.
2. **Generate the Apttus Web Services WSDL** – After you have connected to Apttus Web Service, go to your organization and download the WSDL for the appropriate Web Service (Contract Management Web Service, Batch Update, Proposal Web Service, and so on).
3. **Import the WSDL Files Into Your Development Platform** – After you have generated the WSDL files, you can import them into your development platform. Conga does not provide instructions for the import process. Refer to Salesforce documentation or documentation related to your development platform.
4. **Connect to Apttus** – Before you can begin using Contract Management Web Services, you must first authenticate to Apttus using the login() API.

- Generating the Conga CLM Web Services WSDL

Generating the Conga CLM Web Services WSDL

Before you can import Conga CLM SOAP Web Service into your development or testing platform, you must generate and download the Conga CLM WSDL for the appropriate Web Service.

The example provided here uses SoapUI.

> ⓘ There is a known bug in the WSDL Generator on Salesforce that does not include several field types, so it is recommended to update the WSDL file after you have generated it but *before* importing it into your development platform. You can find the details for any workaround tasks here:
> - • https://success.salesforce.com/issues_view?id=a1p3A000000eatxQAA&title=generated-wsdl-for-apex-webservices-is-malformed
> - • https://success.salesforce.com/issues_view?id=a1p300000008XKUAA2
>
> When updating generated WSDL, make sure that the target namespace for any schema you add points to the correct Web Service (for example, schemas/class/Apttus/AgreementWebService). If you are still having trouble, please ask Conga Professional Services for a modified WSDL for the Web Services you are using.

To generate the Apttus Web Services WSDL

1. Log in to the Salesforce organization that contains your Apttus records and data (sandbox or production).
2. Go to **Setup > Develop > Apex Classes** (on Lightning, go to **Setup > Custom Code > Apex Classes**.
3. Find the Web Service you want to generate the WSDL for (for example, **Contract ManagementWebService**).
4. Click the **WSDL** link to generate the WSDL. The WSDL XML is generated and displayed in a new tab.

5. Right-click on the page and select **View Page Source**. Copy the XML content to any text editor.
6. Save the file with the extension **.wsdl**.
7. Open SoapUI (or wherever is required on your development platform).
8. Create a new SOAP project and import the Apttus Web Services WSDL. All methods under that Web Service are now available to call.

> ⓘ Refer to the **Request/Response XML** section for any API in this reference to get the structure of the request and any prerequisite calls required for any API.

Connecting to Conga CLM

After you have downloaded the Enterprise or Partner WSDL, call the **login()** method to obtain a session ID from your org that you can use when calling Contract Management Web Services. After authenticating, you can use the same session ID until it either expires or your logout or login again.

The example provided here uses SoapUI, an API testing tool which can be downloaded for free here: https://www.soapui.org/.

Prerequisite: To authenticate with Conga, please make sure to have your production or test org credentials on hand (username and password).

To connect to Apttus Web Service using SoapUI

1. Open SoapUI. Go to **File > New SOAP Project**.
2. Enter a name for the project.
3. Click **Browse**. Navigate to the saved Enterprise or Partner WSDL file that you downloaded and click **Open**.
4. Click **OK** to close the project window.
5. From the Navigation panel to the left, highlight the project folder and click to expand. Click to expand the **SoapBinding**. The list of methods that comprise the Enterprise or Partner services are displayed.
6. Scroll down and right-click on **login**. Double-click on an existing **Request**. The request window opens in the SoapUI interface.

> ⓘ If you are doing this for the first time, you need to right-click on the **login** method and select **New Request**.

7. Select and delete all content following the **<soapenv:Header>** tag and the **</soapenv:Header>** tag.
8. Enter the username for your org (must have appropriate privileges) between the **<urn:username>** and **</urn:username>** tags.
9. Enter the username for your org (must have appropriate privileges) between the **<urn:password>** and **</urn:password>** tags.

The request should look like the following:

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
 xmlns:urn="urn:partner.soap.sforce.com">
    <soapenv:Header>
    </soapenv:Header>
    <soapenv:Body>
        <urn:login>
            <urn:username>username@example.com</urn:username>
            <urn:password>password</urn:password>
        </urn:login>
    </soapenv:Body>
</soapenv:Envelope>
```

10. From the upper-left corner of the window, click the **Run** (▶) icon. The response is generated in the right-hand window.
11. Make note of the **serverURL** and the **sessionId** returned by the server. You will use the information to make Conga Web Service calls.

API Reference

- 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.
- 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.

- Author Web Service

  The Author Web Service API contains all the services related to files or documents and can be used with various operations related to X-Author.

- Callback Classes

  The callback classes are used to create and register a custom code.

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.

You can invoke APIs in Agreement Web Service using the following command:

```
Apttus.AgreementWebService.<Name of the Function>
where the name of the function is API Name and its parameters.
```

You can use the Agreement web service APIs to complete the following tasks:

- Activating Agreements
- Publishing Document Outside of Salesforce
- Publishing the Document to Chatter
- Publishing the Document to Files and Attachments
- Selecting a Template for the Agreement Document
- Terminating Agreements
- Updating Smart Fields
- Sending a Document for Signatures

Activating Agreements

This API activates an agreement and deletes draft documents. This API only updates the Status Category to In Effect and the Status to Activated but does not publish the activated agreement document to multiple channels. You must call one of the following APIs to publish the document:

- publishToExternalRepository
- publishToChatterRepositorypublishToDocumentRepository

Prerequisite

You must ensure that the Status Category for the Agreement record is In Signatures or In Filing.

API	Signature
activateAgreement	*webService static Boolean activateAgreement(Id agreementId, List selectedDocIds, List removableDocIds)*

Request 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 Parameter		
Name	**Type**	**Description**
`result`	Boolean	Indicates whether the agreement was activated successfully.

Code Sample

```
1    Id agreementId = agreement.Id;
```

```
2    String[] activateDocIds = new String[1];
3    String[] remDocIds = new String[]{};
4    Boolean response =
     Apttus.AgreementWebService.activateAgreement(agreementId, activateDocIds,
     remDocIds);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:activateAgreement>
            <agr:agreementId>a07020000008w9BAAQ</agr:agreementId>
            <agr:selectedDocIds>00P02000000IYA7EAO</agr:selectedDocIds>
            <agr:removableDocIds>0002000000Cc0LAAS</agr:removableDocIds>
            <agr:removableDocIds>0760000000Cc0GAAS</agr:removableDocIds>
        </agr:activateAgreement>
    </soapenv:Body>
</soapenv:Envelope>
```

> **Example Response**
>
> ```xml
> <soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
>    <soapenv:Body>
>       <activateAgreementResponse>
>          <result>true</result>
>       </activateAgreementResponse>
>    </soapenv:Body>
> </soapenv:Envelope>
> ```

Publishing Document Outside of Salesforce

This API 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.

Prerequisite

Ensure that the APTS_ContentRepositoryType admin object value is set to External. For more information, see Admin Entries.

API	Signature
publishToExternalRepository	*webService static Boolean publishToExternalRepository(Id agreementId, Id attachmentId)*

Request Parameters		
Name	Type	Description
agreementId	ID	The id of the agreement
attachmentId	ID	The id of the document that is to be published.

Response Parameter		
Name	Type	Description
result	Boolean	Indicates whether the document was published successfully.

Code Sample

```
1  Id agreementId = agreement.Id;
2  Id attachmentId = attachment.Id;
3  Boolean response =
   Apttus.AgreementWebService.publishToExternalRepository(Id agreementId, Id
   attachmentId);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

Activating Agreements

Request/Response XML

Example Request

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
```

```
        <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY</agr:sessionId>
      </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:publishToExternalRepository>
            <agr:agreementId>a07020000008w9BAAQ</agr:agreementId>
            <agr:attachmentId>a070S000002aDcuQAE</agr:attachmentId>
        </agr:publishToExternalRepository>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <publishToExternalRepositoryResponse>
            <result>true</result>
        </publishToExternalRepositoryResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

Prerequisite

Ensure that the APTS_ContentRepositoryType admin object value is set to Chatter. For more information, see Admin Entries.

API	Signature
publishToChatterRepository	*webService static Boolean publishToChatterRepository(Id agreementId, Id attachmentId)*

Request 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.

Response Parameter		
Name	**Type**	**Description**
result	Boolean	Indicates whether the document was published to Chatter successfully.

Code Sample

```
1  Id agreementId = agreement.Id;
2  Id attachmentId = AttachmentId;
3  Boolean response = Apttus.AgreementWebService.publishToChatterRepository
   (agreementId, attachmentId);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

Activating Agreements

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:publishToChatterRepository>
            <agr:agreementId>a07020000008w9BAAQ</agr:agreementId>
            <agr:attachmentId>a070S000002aDcuQAE</agr:attachmentId>
        </agr:publishToChatterRepository>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <publishToChatterRepositoryResponse>
```

```
        <result>true</result>
      </publishToChatterRepositoryResponse>
    </soapenv:Body>
  </soapenv:Envelope>
```

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.

Prerequisite

Ensure that the APTS_ContentRepositoryType admin object value is set to Document. For more information, see Admin Entries.

API	Signature
publishToDocumentRepository	*webService static Boolean publishToDocumentRepository(Id agreementId, Id attachmentId)*

Request 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 Parameter		
Name	Type	Description
result	Boolean	Indicates whether the document was published to Files and Attachments successfully.

Code Sample

```
1   Id agreementId = agreement.Id;
2   Id attachmentId = attachment.Id;
3   Boolean response =
    Apttus.AgreementWebService.publishToDocumentRepository(Id agreementId, Id
    attachmentId);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

Activating Agreements

Request/Response XML

Example Request

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY</agr:sessionId>
```

```
            </agr:SessionHeader>
        </soapenv:Header>
        <soapenv:Body>
            <agr:publishToDocumentRepository>
                <agr:agreementId>a07020000008w9BAAQ</agr:agreementId>
                <agr:attachmentId>a070S000002aDcuQAE</agr:attachmentId>
            </agr:publishToDocumentRepository>
        </soapenv:Body>
    </soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <publishToDocumentRepositoryResponse>
            <result>true</result>
        </publishToDocumentRepositoryResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Selecting a Template for the Agreement Document

This associates a template with the agreement, enabling the agreement document to be published.

API	Signature
selectFirstTemplateIdForAgreement	*webService static Id selectFirstTemplateIdForAgreement(Id agreementId)*
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

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY
</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:selectFirstTemplateIdForAgreement>
            <agr:agreementId>a07020000008w9GAAQ</agr:agreementId>
        </agr:selectFirstTemplateIdForAgreement>
    </soapenv:Body>
</soapenv:Envelope>
```

> **Example Response**
>
> ```
> <soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
> tp://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
>     <soapenv:Body>
>         <selectFirstTemplateIdForAgreementResponse>
>             <result>a09R000000Alm7iIAB</result>
>         </selectFirstTemplateIdForAgreementResponse>
>     </soapenv:Body>
> </soapenv:Envelope>
> ```

Terminating Agreements

The terminateAgreementsAsync API allows you to bulk terminate agreements based on the agreement status.

API	Signature
terminateAgreementsAsync	*webService static Id terminateAgreementsAsync(List agreementIds)*

Request Parameters			
Name	Type	Description	Required?
agreementIds	List<ID>	List of agreement Ids	Yes

Code Sample

```
List<ID> agreementIdList = new List<ID> ();
Boolean response =
Apttus.AgreementWebService.terminateAgreementsAsync(agreementIdList);
```

Use Case

Bulk terminate agreements and their related agreements with the same agreement number.

Order of Execution

1. Check permissions.

2. Get the agreement object.
3. Register the terminate indicator.
4. Terminate the agreement.
5. Save the terminated agreement.
6. Reset the terminate indicator.
7. Refresh the original agreement.
8. Post-termination updates.

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:terminateAgreement>
            <agr:agreementId>a07020000008w9GAAQ</agr:agreementId>
        </agr:terminateAgreement>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <terminateAgreement>
            <result>a09R000000Alm7iIAB</result>
        </terminateAgreement>
    </soapenv:Body>
</soapenv:Envelope>
```

Updating Smart Fields

This updates multiple smart fields in a document with the latest values and creates a new check-in with the redlined version without manual intervention.

API	Signature
updateSmartFieldsOnAgreementDocument	*webService static String updateSmartFieldsOnAgreementDocument(Id agreementId, Id documentId)*

Prerequisite: You need to configure the Comply System Property—XAJS Endpoint. For more information, see Comply System Properties.

Request Parameters			
Name	Type	Required	Description
agreementId	ID	Yes	The id of the agreement
documentId	ID	Yes	The id of the document that is to be published.

Response

This API returns documentId of the newly created document after updating all the smart fields.

Code Sample

```
ID agreementId = 'a03123123123';
```

```
ID documentId = '069123123123'; //attachment or file id
Apttus.AgreementWebService.updateSmartFieldsOnAgreementDocument(agreementId,
documentId);
```

Use case

Consider an agreement A1 contains document D1. Create an agreement A2 and clone the document D1. This creates document D2. Attach D2 to A2. As D2 contains metadata from A1, you will not be able to call updateSmartFieldsOnAgreementDocument to update D2. To update D2, you need to call enableAuthoring API and then call updateSmartFieldsOnAgreementDocument.

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D020000008lUh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm8O7.VdNoOTWwjGFxgbrF03ylztaIg6VvFl
_EeKVGaQccY
</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:updateSmartFieldsOnAgreementDocument>
            <agr:agreementId>a07020000008w9GAAQ</agr:agreementId>
            <agr:documentId>a07020000008w9BAAQ</agr:documentId>
```

```
        </agr:updateSmartFieldsOnAgreementDocument>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <updateSmartFieldsOnAgreementDocument>
            <result>a070S000002I4J4QAK</result>
        </updateSmartFieldsOnAgreementDocument>
    </soapenv:Body>
</soapenv:Envelope>
```

Sending a Document for Signatures

This API allows you to send the agreement document for manual signatures.

API	Signature
sendForSignature	*webService static Boolean sendForSignature(Id primaryContactID, List emailCc, List emailBcc, List emailAdditionalTo, Id emailTemplateId, Id agreementId, List attachmentIds)*
Request Parameters	

Name	Type	Description	Required
primaryContact ID	ID	The id of the primary contact.	Yes
emailCc	list	The email ids of the recipients you need to CC in the email.	Optional
emailBcc	list	The email ids of the recipients you need to BCC in the email.	Optional

Request Parameters				
Name	**Type**	**Description**		**Required**
emailAdditional To	list	The email ids of the recipients you need to send the email.		Yes
emailTemplateI d	ID	The id of the email template that you need to use to send the email.		Yes
agreementId	ID	The id of the document that is to be signed.		Yes
attachmentIds	list	The ids of the documents that are to be signed.		Yes
Response Parameter				
Name		**Type**	**Description**	
result		Boolean	Indicates whether the agreement was sent for signatures successfully.	

Code Sample

```
1   List<String> addto = new list<String>{'test1@abc.com','test2@abc.com','tes
    t3@abc.com','test4@apttus.com'};
2   List<String> cc = new list<String>{'test5@abc.com','test6@abc.com','test7@
    abc.com','test8@abc.com'};
3   List<String> bcc = new list<String>{'test9@abc.com','test10@abc.com','test
    11@abc.com','test12@abc.com'};
4   List<id> attmentids = new list<String>{'00P0S000002nzJg','00P0S000002nzJb'}
    ;
5   id primaryContactID = '0030S00000MxYfb';
6   id emailTemplateId = '00XA0000000h9eQ';
7   id agreementId = 'a070S000002I3I4';
8   Boolean response =
    apttus.AgreementWebService.sendForSignature(primaryContactID,cc,bcc,addto,
    emailTemplateId,agreementId,attmentids);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Header>
        <agr:SessionHeader>
            <agr:sessionId>00D0S0000000Pa8!ARUAQMbFkHvnVLwOoAiCDHaWEz0Bkjf6uEcSsGd4853e7wLfvv88oUmBtR0xy2BYEgdcP6IrMA1b9qJ7N3uDyPC31sNPlfjs</agr:sessionId>
        </agr:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <agr:sendForSignature>
            <agr:primaryContactID>0030S00000MxYfbQAF</agr:primaryContactID>
            <agr:emailCc>test1@abc.com</agr:emailCc>
            <agr:emailCc>test2@abc.com</agr:emailCc>
            <agr:emailBcc>test3@abc.com</agr:emailBcc>
            <agr:emailBcc>test4@abc.com</agr:emailBcc>
            <agr:emailAdditionalTo>test5@abc.com</agr:emailAdditionalTo>
            <agr:emailAdditionalTo>test6@abc.com</agr:emailAdditionalTo>
            <agr:emailTemplateId>00XA0000000h9eQ</agr:emailTemplateId>
            <agr:agreementId>a070S000002I4J4QAK</agr:agreementId>
            <agr:attachmentIds>a1z0S000000u1hqQAA</agr:attachmentIds>
        </agr:sendForSignature>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
    <soapenv:Body>
        <sendForSignatureResponse>
            <result>true</result>
        </sendForSignatureResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

You can invoke APIs in Merge Web Service using the following commands:

```
Apttus.MergeWebService.<Name of the Function>
where the name of the function is API Name and its parameters.
```

```
Apttus_Proposal.MergeWebService.<Name of the Function>
where the name of the function is API Name and its parameters.
```

You can use the Merge web service APIs to complete the following tasks:

- Adding Header and Footer Text without Document Protection
- Adding Header and Footer Text with Document Protection
- Applying Security Parameters to a PDF
- Converting a Word Document into a given output format
- Converting a Word Document into a given output format (Deprecated)
- Converting a Word Document into a given output format for Standard Object (Deprecated)
- Converting a Word Document into a PDF
- Converting a Word Document into a PDF for Standard Objects
- Enabling Authoring for Agreement Documents
- Generating a Document
- Generating a Document for a Standard Object

Adding Header and Footer Text without Document Protection

This API allows you to append the given text to the header and footer for a given document.

> **ⓘ Note**
>
> **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.

API	Signature
appendToHeaderFooter	*webService static Boolean appendToHeaderFooter(Id docId, String headerText, String footerText, String sessionId, String serverUrl)*
Request Parameters	

Name	Type	Description	Required?
docId	ID	The id of the document which will have header and footer content added to it.	Yes

Request Parameters			
Name	**Type**	**Description**	**Required?**
headerText	String	The header text to be appended to the document.	Yes
footerText	String	The footer text to be appended to the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server Url.	Yes

Response Parameter		
Name	**Type**	**Description**
result	Boolean	Indicates whether the header and footer are added successfully.

Code Sample

```
ID docId= AttachmentId;
String headerText = 'This is Header';
String footerText = 'This is Footer';
String apiServerURL = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
services/Soap/u/50.0/' +
UserInfo.getOrganizationId();
String SessionId = sessionId; //This is the session Id.
String generatedDocId = Apttus_Proposal.MergeWebService.appendToHeaderFooter(docId,
headerText, footerText, sessionId, serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
    </soapenv:Header>
    <soapenv:Body>
        <mer:appendToHeaderFooter>
            <mer:docId>068R0000001Z56SIAS</mer:docId>
            <mer:headerText>Care Company</mer:headerText>
            <mer:footerText>Copyright 2020</mer:footerText>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:appendToHeaderFooter>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/">
    <soapenv:Body>
        <appendToHeaderFooter>
            <result>true</result>
        </appendToHeaderFooter>
    </soapenv:Body>
</soapenv:Envelope>
```

Adding Header and Footer Text with Document Protection

This API allows you to add header and footer text in a document. In FX1 documents, the document protection levels are reset when the header and footer are added. This API retains protection levels for FX1 documents.

API	Signature
appendToHeaderFooter2	*webService static Boolean appendToHeaderFooter2(Id docId, String headerText, String footerText, String pLevel, String sessionId, String serverUrl)*
Request Parameters	

Name	Type	Description	Required?
docId	ID	The id of the document which will have header and/or footer content add to it.	Yes
headerText	String	The header text to append to the document.	Yes
footerText	String	The footer text to append to 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
sessionId	String	The Salesforce session id.	Yes

Request Parameters			
Name	**Type**	**Description**	**Required?**
serverUrl	String	The Salesforce server Url.	Yes

Response Parameter		
Name	**Type**	**Description**
result	Boolean	Indicates whether the header and footer were added successfully.

Code Sample

```
ID docId = 'a0Y61000002K6IR';
String headerText = 'Agreement Id: 0123456789';
String footerText = 'Date Created: 11/27/2018 7:23:15 PM';
String pLevel = 'Full access';
String sessionId = sessionId; //This is the session Id.
String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/services/
Soap/u/50.0/' + UserInfo.getOrganizationId();
Boolean result = Apttus.MergeWebService.appendToHeaderFooter2(docId, headerText,
footerText, pLevel, sessionId, serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
    </soapenv:Header>
    <soapenv:Body>
        <mer:appendToHeaderFooter2>
            <mer:docId>a0Z61000052AFIR</mer:docId>
            <mer:headerText>Company</mer:headerText>
            <mer:footerText>Copyright</mer:footerText>
            <mer:pLevel>Full Access</mer:pLevel>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:appendToHeaderFooter2>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/">
    <soapenv:Body>
        <appendToHeaderFooter2>
            <result>true</result>
        </appendToHeaderFooter2>
    </soapenv:Body>
</soapenv:Envelope>
```

Applying Security Parameters to a PDF

This API applies Adobe PDF security parameters to the PDF document. Ensure that you have set an admin entry with the **PDFSecurityDefault** tags. For more information, see CLM for Administrators.

The `applyPDFSecurity()` 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 be `docId`, `session Id`, `serverUrl` and so on. This API controls the security properties of a PDF document, such as Content Copying, Filling of form fields, and Printing.

API	Signature
applyPDFSecurity	*webService static Boolean applyPDFSecurity(Id docId, String sessionId, String serverUrl)*

Request Parameters			
Name	Type	Description	Required?
docId	ID	The id of the PDF document to apply security parameters to.	Yes
session Id	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server Url.	Yes

Response Parameter		
Name	**Type**	**Description**
result	Boolean	Indicates if the security parameters were applied successfully to the PDF.

Code Sample

```
1   ID docId = 'a0Y61000002K6IR';
2   String sessionId = sessionId; //This is the session Id.
3   String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
    services/Soap/u/50.0/' + UserInfo.getOrganizationId();
4   Boolean result =
    Apttus.MergeWebService.applyPDFSecurity(docId,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

`<soapenv:Envelope`
`    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"`
`    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">`
`    <soapenv:Header>`
`        <mer:sessionId>00D020000008lUh!`
`AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC`
`__d7TM.vxCY</mer:sessionId>`

```
        </soapenv:Header>
        <soapenv:Body>
            <mer:applyPDFSecurity>
                <mer:docId>068R0000001Z56SIAS</mer:docId>
                <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
                <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
            </mer:applyPDFSecurity>
        </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/">
    <soapenv:Body>
        <applyPDFSecurity>
            <result>true</result>
        </applyPDFSecurity>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

> ⓘ **Note**
>
> - 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.

API	Signature
convertWordDocForAgreement	*webService static Id convertWordDocForAgreement(Id agreementId, Id docId, String docFileName, String docFormat, String pLevel, Boolean addWatermark, Boolean removeWatermark, String sessionId, String serverUrl)*

Request Parameters

Name	Type	Description	Required?
agreementId	ID	The id of the agreement providing the content of the document.	Yes
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

Request Parameters			
Name	Type	Description	Required?
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response Parameter		
Name	Type	Description
docId	ID	The id of the converted document.

Code Sample

```
String apiServerURL = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
services/Soap/u/50.0/' + 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,docFo
rmat,pLevel,addWatermark,removeWatermark,ServerInfo.getSessionId(),apiServerURL);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:convertAgreementWordDoc>
            <mer:agreementId>a07R000000AwP93IAF</mer:agreementId>
            <mer:docId>a20R00000025o1FIAQ</mer:docId>
            <mer:docFileName>MS-Original_TemplateWithOrgClause</mer:docFileName>
            <mer:docFormat>PDF</mer:docFormat>
            <mer:pLevel>Insert comments only</mer:pLevel>
            <mer:addWatermark>True</mer:addWatermark>
            <mer:removeWatermark>False</mer:removeWatermark>
            <mer:agreementNbr>00026745.0</mer:agreementNbr>
            <mer:dateFormat>YYYY-MM-DD</mer:dateFormat>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:convertAgreementWordDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/">
    <soapenv:Body>
        <convertAgreementWordDoc>
            <result>a070S000002aDcuQAE</result>
        </convertAgreementWordDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
convertAgreementWordDoc	*webService static Id convertAgreementWordDoc(Id agreementId, Id docId, String docFileName, String docFormat, String pLevel, Boolean addWatermark, Boolean removeWatermark, String agreementNbr, String dateFormat, String sessionId, String serverUrl)*

Request Parameters

Name	Type	Description	Required?
agreementId	ID	The id of the agreement providing the content for the document.	Yes
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

Request Parameters			
Name	**Type**	**Description**	**Required?**
docFormat	String	Indicates whether the document will be: • *DOC* • *DOCX* • *RTF*	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
agreementNbr	String	The agreement number of the document, upserted in the header.	Yes
dateFormat	String	The date format for the footer of the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response Parameter		
Name	Type	Description
result	ID	The id of the converted document.

Code Sample

```
1   ID agreementId = 'a016100000Che3D';
2   ID docId = 'a0Y61000002K6IR';
3   String docFileName = 'Agreement';
4   String docFormat = 'PDF';
5   String pLevel = 'Full access';
6   Boolean addWatermark = true;
7   Boolean removeWatermark = false;
8   String agreementNbr = '1234';
9   String dateFormat = 'M/d/yyyy HH:mm:ss';
10  String sessionId = sessionId; //This is the session Id.
11  String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
    services/Soap/u/50.0/' + UserInfo.getOrganizationId();
12  ID ConvertedDocId =
    Apttus.MergeWebService.convertAgreementWordDoc(agreementId,docId,docFileNa
    me,docFormat,pLevel,addWatermark,removeWatermark,agreementNbr,dateFormat,s
    essionId,serverUrl);
```

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.

API	Signature
convertWordDoc	*webService static Id convertWordDoc(Id docId, String docFileName, String docFormat, Id sObjectId, String pLevel, Boolean addWatermark, Boolean removeWatermark, String headerText, String footerText, String sessionId, String serverUrl)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
docId	ID	The id of the agreement document to be converted 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*	Yes
sObjectId	ID	The sObject id for which you want to update 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

Request Parameters			
Name	Type	Description	Required?
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
headerText	String	The header text to be appended to the document.	Yes
footerText	String	The footer text to be appended to the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response Parameter		
Name	Type	Description
result	ID	The id of the converted document.

Code Sample

```
1   ID docId = 'a0Y61000002K6IR';
2   String docFileName = 'Agreement';
3   String docFormat = 'PDF';
4   ID sObjectId = '0016100000KvBHi';
5   String pLevel = 'Full access';
6   Boolean addWatermark = true;
7   Boolean removeWatermark = false;
```

```
 8    String headerText = 'Agreement Id: 0123456789';
 9    String footerText = 'Date Created: 11/27/2018 7:23:15 PM';
10    String sessionId = sessionId; //This is the session Id.
11    String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
      services/Soap/u/50.0/' + UserInfo.getOrganizationId();
12
13    ID ConvertedDocId=
      Apttus.MergeSupport.convertWordDoc(docId,docFileName,docFormat,sObjectId,p
      Level,addWatermark,removeWatermark,headerText,footerText,sessionId,serverU
      rl) ;
```

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 to the Word document is not applicable to the PDF document.

API	Signature
convertWordDocToPDF	*webService static Id convertWordDocToPDF(Id docId, String docFileName, Boolean addWatermark, Boolean removeWatermark, String headerText, String footerText, String sessionId, String serverUrl)*
Request Parameters	

Name	Type	Description	Required?
docId	ID	The id of the word document to be converted to PDF.	Yes
docFileName	String	The filename for the newly created PDF.	Yes
addWatermark	Boolean	Indicates whether a draft watermark should be added to the PDF.	Yes

Request Parameters			
Name	**Type**	**Description**	**Required?**
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting PDF.	Yes
headerText	String	The header text to append to the document.	Yes
footerText	String	The footer text to append to the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response Parameter		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Code Sample

```
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/50.0/' + UserInfo.getOrganizationId();
String SessionId = sessionId;
Id convertedDocId = Apttus.MergeWebService.convertWordDocToPDF(docId, fileName,
addWatermark, removeWatermark, headerText, footerText, apiSessionId, apiServerURL);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:convertWordDocToPDF>
            <mer:docId>068R0000001Z56SIAS</mer:docId>
            <mer:docFileName>MSA</mer:docFileName>
            <mer:addWatermark>True</mer:addWatermark>
            <mer:removeWatermark>False</mer:removeWatermark>
            <mer:headerText>Company</mer:headerText>
            <mer:footerText>Copyright 2020</mer:footerText>
            <mer:sessionId>00D020000008lUh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:convertWordDocToPDF>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/">
    <soapenv:Body>
        <convertWordDocToPDF>
            <result>a070S000002aDcuQAE</result>
        </convertWordDocToPDF>
    </soapenv:Body>
</soapenv:Envelope>
```

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 to the Word document is not applicable to the PDF document.

API	Signature
convertWordDocToPDF2	*webService static Id convertWordDocToPDF2(Id docId, String docFileName, Id sObjectId, String pLevel, Boolean addWatermark, Boolean removeWatermark, String headerText, String footerText, String sessionId, String serverUrl)*
Request Parameters	

Name	Type	Description	Required?
docId	ID	The id of the word document to be converted to PDF.	Yes
docFileName	String	The filename for the newly created PDF.	Yes
sObjectId	Id	The id of the standard object.	Yes

Request Parameters			
Name	Type	Description	Required?
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 PDF.	Yes
removeWatermark	Boolean	Indicates whether a draft watermark on the source word document should be removed from the resulting PDF.	Yes
headerText	String	The header text to append to the document.	Yes
footerText	String	The footer text to append to the document.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server URL.	Yes

Response Parameter		
Name	Type	Description
result	ID	The id of the generated document.

Code Sample

```
 1   ID docId = 'a0Y61000002K6IR';
 2   String docFileName = 'Agreement';
 3   ID sObjectId = null;
 4   String pLevel = null;
 5   Boolean addWatermark = true;
 6   Boolean removeWatermark = false;
 7   String headerText = 'Agreement Id: 0123456789';
 8   String footerText = 'Date Created: 11/27/2018 7:23:15 PM';
 9   String sessionId = sessionId; //This is the session Id.
10   String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
     services/Soap/u/50.0/' + UserInfo.getOrganizationId();

11
12   ID ConvertedDocId =
     Apttus.MergeWebService.convertWordDocToPDF2(docId,docFileName,sObjectId,pL
     evel,addWatermark,removeWatermark,headerText,footerText,sessionId,serverUr
     l);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Header>
        <mer:SessionHeader>
```

```
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:convertWordDocToPDF2>
         <mer:docId>00P02000000IY8p</mer:docId>
         <mer:docFileName>MS-NDA-Regenerated_TemplateWithOrgClause_ct__.docx</mer:doc
FileName>
         <mer:sObjectId>a07020000008w91</mer:sObjectId>
         <mer:pLevel>Full Access</mer:pLevel>
         <mer:addWatermark>False</mer:addWatermark>
         <mer:removeWatermark>False</mer:removeWatermark>
         <mer:headerText>Company</mer:headerText>
         <mer:footerText>Copyright 2020</mer:footerText>
         <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
         <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
      </mer:convertWordDocToPDF2>
   </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Body>
      <convertWordDocToPDF2Response>
         <result>00P02000000IayZEAS</result>
      </convertWordDocToPDF2Response>
   </soapenv:Body>
</soapenv:Envelope>
```

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*.

API	Signature
enableAuthoring	*webService static Boolean enableAuthoring(Id sObjectId, String pLevel, List docIds, String sessionId, String serverUrl)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
sObjectId	ID	The ID of the standard object for which authoring is to be enabled.	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
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. You can list comma separated docIds.	Yes
sessionId	String	The Salesforce session id.	Yes
serverUrl	String	The Salesforce server id.	Yes

Response Parameter		
Name	Type	Description
result	Boolean	Indicates if the authoring was enabled successfully for the listed documents.

Code Sample

```
1  ID sObjectId = 'a016100000Che3D';
2  String pLevel = 'Full access';
3  ID[] docIds = new ID[]
4  {'a0Y61000002K6IR','a0Y61000003K7jR'};
5  String sessionId = sessionId; //This is the session Id.
6  String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
   services/Soap/u/50.0/' + UserInfo.getOrganizationId();
7
8  Boolean success =
   Apttus.MergeWebService.enableAuthoring(sObjectId,pLevel,docIds,sessionId,s
   erverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request
`<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">`

```
    <soapenv:Header>
          <mer:SessionHeader>
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
      <mer:enableAuthoring>
        <mer:sObjectId>a07020000008w91</mer:sObjectId>
        <mer:pLevel>Full Access</mer:pLevel>
         <mer:docIds>00P02000000IY8Q</mer:docIds>
         <mer:docIds>00P02000000IY8p</mer:docIds>
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
      </mer:enableAuthoring>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
      <enableAuthoringResponse>
        <result>true</result>
      </enableAuthoringResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
generateDoc	*webService static Id generateDoc(Id templateId, Id agreementId, String pLevel, String docFormat, String sessionId, String serverUrl)*

Request 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

Response Parameter		
Name	Type	Description
generatedDocId	ID	The id of the generated document.

Code Sample

```
1   ID templateId= 'a036F00000urlTX';
2   Id agreementId = 'a016F00001V5HZA';
3   String pLevel = 'Read only';
4   String docFormat = 'DOC';
5   String apiServerURL = System.Url.getSalesforceBaseUrl().toExternalForm() +
    '/services/Soap/u/50.0/' + UserInfo.getOrganizationId();
6   String SessionId = UserInfo.getSessionId();  //This is the session Id.
7   String generatedDocId = Apttus.MergeWebService.generateDoc(templateId,
    agreementId, pLevel, docFormat, SessionId, apiServerURL);
```

This API is the same as the **generateDoc** API and additionally enables you to add a draft watermark to the generated document.

API	Signature
generateDoc2	*webService static Id generateDoc2(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*

Request 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

Request Parameters			
Name	**Type**	**Description**	**Required?**
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
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 Parameter		
Name	**Type**	**Description**
generatedDocId	ID	The id of the generated document.

Code Sample

```
1    ID templateId= 'a036F00000urlTX';
2    Id agreementId = 'a016F00001V5K6C';
3    String pLevel = 'Read only';
4    String docFormat = 'DOC';
5    Boolean isDraft = true;
6    String apiServerURL = System.Url.getSalesforceBaseUrl().toExternalForm() +
     '/services/Soap/u/50.0/' + UserInfo.getOrganizationId();
7    String SessionId = UserInfo.getSessionId();  //This is the session Id.
8    String generatedDocId = Apttus.MergeWebService.generateDoc2(templateId,
     agreementId, pLevel, docFormat, isDraft, SessionId, apiServerURL);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:generateDoc>
         <mer:templateId>a09R000000AjMCy</mer:templateId>
         <mer:agreementId>a07020000008w91</mer:agreementId>
         <mer:pLevel>Full Access</mer:pLevel>
         <mer:docFormat>DOCX</mer:docFormat>
```

```
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
      </mer:generateDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <generateDocResponse>
            <result>00P02000000IazXEAS</result>
        </generateDocResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Generating a Document for a Standard Object

This API 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*.

API	Signature
generateCustomDoc	*webService static Id generateCustomDoc(Id templateId, Id sObjectId, String sObjectType, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
templateId	ID	The id of the template used to generate the word doc.	Yes
sObjectId	ID	The id of the sObject holding the data for the merge fields.	Yes
sObjectType	String	The type of the sObject.	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
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 Parameter		
Name	**Type**	**Description**
docID	ID	The id of the generated document.

Code Sample

```
ID templateId = 'a036100000Fha5D';
ID sObjectId = '0016100000KvBHi';
String sObjectType = 'Account';
String pLevel = 'Full access';
String docFormat = 'DOCX';
Boolean isDraft = true;
String sessionId = UserInfo.getSessionId();
String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/services/
Soap/u/50.0/' + UserInfo.getOrganizationId();
ID docId =
Apttus.MergeWebService.generateCustomDoc(templateId,sObjectId,sObjectType,pLevel,docF
ormat,isDraft,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
```

```
    <soapenv:Body>
        <mer:generateCustomDoc>
            <mer:templateId>a09R000000AjMCy</mer:templateId>
            <mer:sObjectId>0015500000YAdXR</mer:sObjectId>
            <mer:sObjectType>Account</mer:sObjectType>
            <mer:pLevel>Read only</mer:pLevel>
            <mer:docFormat>PDF</mer:docFormat>
            <mer:isDraft>True</mer:isDraft>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:generateCustomDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <generateCustomDocResponse>
            <result>00P02000000IazhEAC</result>
        </generateCustomDocResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
submitGenerateDoc	*webService static Id submitGenerateDoc(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*

Request 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* • *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
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 Parameter		
Name	Type	Description
result	ID	The id of the generated document.

Code Sample

```
1    ID templateId = 'a036100000Fha5D';
2    ID agreementId = 'a016100000Che3D';
3    String pLevel = 'Full access';
4    String docFormat = 'DOC';
5    Boolean isDraft = false;
6    String sessionId = sessionId; //This is the session Id.
7    String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
     services/Soap/u/50.0/' + UserInfo.getOrganizationId();
8
9    ID callId =
     Apttus.MergeWebService.submitGenerateDoc(templateId,agreementId,pLevel,doc
     Format,isDraft,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
  http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
```

```
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:submitGenerateDoc>
            <mer:templateId>a09R000000AjMCy</mer:templateId>
            <mer:agreementId>a07020000008w91</mer:agreementId>
            <mer:pLevel>Insert comments only</mer:pLevel>
            <mer:docFormat>DOC</mer:docFormat>
            <mer:isDraft>False</mer:isDraft>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:submitGenerateDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <submitGenerateDocResponse>
            <result>a0G020000009fMbEAI</result>
        </submitGenerateDocResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
submitGenerateCustomDoc	*webService static Id submitGenerateCustomDoc(Id templateId, Id sObjectId, String sObjectType, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*

Request Parameters			
Name	Type	Description	Required?
templateId	ID	The id of the template used to generate the word doc.	Yes
sObjectId	ID	The sObject id which comprises the data for the merge fields.	Yes
sObjectType	String	The type of the sObject.	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

Request Parameters			
Name	**Type**	**Description**	**Required?**
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 Parameter		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Code Sample

```
1   ID templateId = 'a036100000Fha5D'
2   ID sObjectId = '0016100000KvBHi';
3   String sObjectType = 'Account';
4   String pLevel = 'Full access';
5   String docFormat = 'DOC';
6   Boolean isDraft= false;
7   String sessionId = sessionId; //This is the session Id.
8   String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
    services/Soap/u/50.0/' + UserInfo.getOrganizationId();
9
```

CLM

```
10    ID callId =
      Apttus.MergeWebService.submitGenerateCustomDoc(templateId,sObjectId,sObjec
      tType,pLevel,docFormat,isDraft,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:submitGenerateCustomDoc>
            <mer:templateId>a09R000000AjMCy</mer:templateId>
            <mer:sObjectId>0015500000YAdXR</mer:sObjectId>
            <mer:sObjectType>Account</mer:sObjectType>
            <mer:pLevel>Full Access</mer:pLevel>
            <mer:docFormat>PDF</mer:docFormat>
            <mer:isDraft>False</mer:isDraft>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
```

```
        </mer:submitGenerateCustomDoc>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <submitGenerateCustomDocResponse>
            <result>a0G020000009fMlEAI</result>
        </submitGenerateCustomDocResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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*.

API	Signature
generateSupportingDoc	*webService static Id generateSupportingDoc(Id templateId, Id agreementId, String pLevel, String docFormat, String sessionId, String serverUrl)*

Request Parameters			
Name	Type	Description	Required?
templateId	ID	The id of the template used to generate the word document.	Yes

Request Parameters			
Name	Type	Description	Required?
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

Response Parameter		
Name	Type	Description
result	ID	The id of the generated document.

Code Sample

```
1    ID templateId = 'a036100000Fha5D';
```

```
2    ID agreementId = 'a016100000Che3D';
3    String pLevel = 'Full access';
4    String docFormat = 'DOC';
5    String sessionId = sessionId; //This is the session Id.
6    String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
     services/Soap/u/50.0/' + UserInfo.getOrganizationId();
7    ID docId =
     Apttus.MergeWebService.generateSupportingDoc(templateId,agreementId,pLevel
     ,docFormat,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:generateSupportingDoc>
         <mer:templateId>a09R000000AjMCy</mer:templateId>
         <mer:agreementId>a07020000008w91</mer:agreementId>
         <mer:pLevel>Insert Comments Only</mer:pLevel>
         <mer:docFormat>DOCX</mer:docFormat>
```

```
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
    </mer:generateSupportingDoc>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <generateSupportingDocResponse>
            <result>00P02000000Ib0GEAS</result>
        </generateSupportingDocResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

This API is the same as the **generateSupportingDoc** API and additionally enables you to add a draft watermark to the generated document.

API	Signature
generateSupportingDoc2	*webService static Id generateSupportingDoc2(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*
Request 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

Request Parameters

Name	Type	Description	Required?
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'.	Yes
docFormat	String	Indicates whether the document will be 'DOC', 'DOCX', 'PDF', or '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 Parameter

Name	Type	Description
result	ID	The id of the generated document.

Code Sample

```
1  ID templateId = 'a036100000Fha5D';
2  ID agreementId = 'a016100000Che3D';
3  String pLevel = 'Full access';
4  String docFormat = 'DOC';
5  isDraft= true;
6  String sessionId = sessionId; //This is the session Id.
7  String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
   services/Soap/u/50.0/' + UserInfo.getOrganizationId();
```

```
  8    ID docId =
       Apttus.MergeWebService.generateSupportingDoc2(templateId,agreementId,pLeve
       l,docFormat,isDraft,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:generateSupportingDoc2>
            <mer:templateId>a09R000000AjMCy</mer:templateId>
            <mer:agreementId>a07020000008w91</mer:agreementId>
            <mer:pLevel>Insert Comments Only</mer:pLevel>
            <mer:docFormat>DOCX</mer:docFormat>
            <mer:isDraft>True</mer:isDraft>
            <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
            <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
        </mer:generateSupportingDoc2>
```

```
        </soapenv:Body>
   </soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Body>
      <generateSupportingDoc2Response>
         <result>00P02000000Ib0aEAC</result>
      </generateSupportingDoc2Response>
   </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
submitGenerateSupportingDoc	*webService static Id submitGenerateSupportingDoc(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)*

Request Parameters		
Name	**Type**	**Description**
templateId	ID	The id of the template used to generate the word document.

Request Parameters		
Name	**Type**	**Description**
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 Parameter		
Name	**Type**	**Description**
result	ID	The id of the generated document.

Code Sample

```
1    ID templateId = 'a036100000Fha5D';
2    ID agreementId = '0016100000KvBHi';
3    String pLevel = 'Full access';
4    String docFormat = 'DOC';
5    Boolean isDraft= false;
6    String sessionId = sessionId; //This is the session Id.
7    String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
     services/Soap/u/50.0/' + UserInfo.getOrganizationId();
8
9    ID callId =
     Apttus.MergeWebService.submitGenerateSupportingDoc(templateId,agreementId,
     pLevel,docFormat,isDraft,sessionId,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:submitGenerateSupportingDoc>
```

```
        <mer:templateId>a09R000000AjMCy</mer:templateId>
        <mer:agreementId>a07020000008w91</mer:agreementId>
        <mer:pLevel>Insert Comments Only</mer:pLevel>
        <mer:docFormat>DOCX</mer:docFormat>
        <mer:isDraft>True</mer:isDraft>
        <mer:sessionId>00D020000008lUh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIl7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
        <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D020000008lUh</mer:serverUrl>
    </mer:submitGenerateSupportingDoc>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Body>
      <submitGenerateSupportingDocResponse>
         <result>a0G020000009fMqEAI</result>
      </submitGenerateSupportingDocResponse>
   </soapenv:Body>
</soapenv:Envelope>
```

Merging Multiple Documents to a PDF without PDF Protection

You can use any of the following Merge Webservice APIs to merge multiple documents into a single PDF. The supported file types are DOC, DOCX, XLS, XLSX, PPT, PPTX, and PDF. Choose the API that best suits your needs (note limitations for each):

- mergeDocsToPDF
- mergeDocsToPDF2
- createPDF

API	Signature
mergeDocsToPDF	*webService static Id mergeDocsToPDF(Id parentId, List docIds, String docFileName, String sessionId, String serverUrl)*

This API merges multiple documents using the values specified in the docIds parameter into a single PDF document with the name docFileName.

Request 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.

Response Parameter		
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.

Code Sample

```
1  ID parentId = '0016100000KvBHi'
2  ID[] docIds = new ID[]{'a0Y61000002K6IR','a0Y61000003K7jR'};
3  String docFileName = 'Agreement-Merged.pdf';
4  String sessionId = sessionId;
5  String serverUrl = System.Url.getSalesforceBaseUrl().toExternalForm() + '/
   services/Soap/u/50.0/' + UserInfo.getOrganizationId();
6  ID docId =
   Apttus.MergeWebService.mergeDocsToPDF(parentId,docIds,docFileName,sessionI
   d,serverUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:mergeDocsToPDF>
         <mer:parentId>a070S000002bSFzQAM</mer:parentId>
         <mer:docIds>0690S000000SvnfQAC</mer:docIds>
         <mer:docIds>0690S000000SvnkQAC</mer:docIds>
```

```xml
            <mer:docFileName>Merged.PDF</mer:docFileName>
            <mer:sessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</mer:sessionId>
            <mer:serverUrl>https://testmanagedclm--tbox.my.salesforce.com/services/Soap/
u/50.0/00D0S0000000Pa8</mer:serverUrl>
        </mer:mergeDocsToPDF>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <mergeDocsToPDFResponse>
            <result>0690S000000SvwcQAC</result>
        </mergeDocsToPDFResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Merging Multiple Documents to a PDF with PDF Protection

The API is an enhancement of the existing mergeDocsToPDF API. The 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. The supported file types are DOC, DOCX, XLS, XLSX, PPT, PPTX, and 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.

API	Signature
mergeDocsToPDF2	*webService static Id mergeDocsToPDF2(Apttus.CustomClass.ActionParams mergeParams)*

Request 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
ProtectOutputDoc	Boolean	If true, protect the output document with PDF security as defined in Comply properties.	Yes

Request Parameters			
Name	**Type**	**Description**	**Required?**
addAutoHeaderFooter	Boolean	If true: • The agreement number is added as the header on the generated agreement. • The timestamp as defined in comply system property is added as the footer on the generated agreement. If false, you need to define the following parameters. <table><tr><td colspan="5">**Request Parameters**</td></tr><tr><td>**S. N o**</td><td>**Na me**</td><td>**T y p e**</td><td>**Description**</td><td>**Req uire d?**</td></tr><tr><td>1</td><td>Ad dHe ade r</td><td>B o ol e a n</td><td>If true, you need to define parameters from 2-6.</td><td>Opti ona l</td></tr></table>	Yes

Request Parameters			
Name	**Type**	**Description**	**Required?**
		Request Parameters	

Request Parameters

S. No	Name	Type	Description	Required?
2	HeaderMode	String	The existing footer values are customized based on the values provided for parameters 3-6. Supported value: Overwrite	Yes if Add Header is true
3	HeaderText	String	The text that should be displayed at the header of the generated document.	Yes if Add Header is true
4	HeaderFont	String	The system font for the header text. Sample value: Arial, Tahoma	Yes if Add Header is true

Request Parameters			
Name	Type	Description	Required?
		Request Parameters	

Inner table:

S.No	Name	Type	Description	Required?
5	HeaderFontSize	Integer	The font size of the header text.	Yes if AddHeader is true
6	HeaderAlignment	String	The alignment of the header text. Supported values: Left, Right, Center	Yes if AddHeader is true
7	AddFooter	Boolean	If true, you need to define parameters from 8-12.	Optional

Request Parameters			
Name	**Type**	**Description**	**Required?**
		Request Parameters 	

Nested table under Description:

S.No	Name	Type	Description	Required?
8	Footer Mode	String	The existing footer values are customized based on the values provided for parameters 9-12. Supported value: Overwrite	Yes if Add Footer is true
9	Footer Text	String	The text that should be displayed at the footer of the generated document.	Yes if Add Footer is true
10	Footer Font	String	The system font for the footer text. Sample value: Arial, Tahoma	Yes if Add Footer is true

Request Parameters			
Name	**Type**	**Description**	**Required?**
		Request Parameters	

Inner table under Description:

S. No	Name	Type	Description	Required?
11	Footer FontSize	Integer	The font size of the footer text.	Yes if Add Footer is true
12	Footer Alignment	String	The alignment of the footer text. Supported values: Left, Right, Center	Yes if Add Footer is true

Response Parameter		
Name	**Type**	**Description**
docId	ID	The id of the generated PDF document.

Code Sample

```
1  public String docFormat { get; set; }
2  public String outputDocFileBasename { get; set; }
3  private Boolean protectOutputDocStatus;
4  public String protectOutputDocFlag { get; set; }
```

```
 5  private Boolean preserveRedlinesStatus;
 6  public String preserveRedlinesFlag { get; set; }
 7  public List<SelectOption> listOfDocxAttachmentsRelated2Agreement_Selected
    { get; set; }
 8  public List<SelectOption> listOfPDFAttachmentsRelated2Agreement_Selected
    { get; set; }
 9  public String apiServerURL = '';
10  private String servicesSOAPInfo = '/services/Soap/u/50.0/';
11
12  ...
13  ...
14
15  private void init() {
16
17  docFormat = 'PDF';
18  protectOutputDocFlag = 'True';
19  protectOutputDocStatus = true;
20  preserveRedlinesFlag = 'True';
21  preserveRedlinesStatus = true;
22  outputDocFileBasename = 'Agreement_outputDocFilename_mergeDocsToPDF2';
23  sessionId = UserInfo.getSessionId();
24  apiServerURL = System.Url.getSalesforceBaseUrl().toExternalForm() +
    servicesSOAPInfo + UserInfo.getOrganizationId();
25  }
26
27
28  public void mergeDocsToPDF2_ControllerAction() {
29
30  String outputDocFilename = outputDocFileBasename + '.' + docFormat;
31
32  List<Apttus.CustomClass.AttachmentInfo> attachmentsInfoList = new
     List<Apttus.CustomClass.AttachmentInfo>();
33  List<Id> attachmentsIdList = new List<Id>();
34
35  // Attachments: Docx
36  if (listOfDocxAttachmentsRelated2Agreement_Selected != null) {
37
38  if (!listOfDocxAttachmentsRelated2Agreement_Selected.isEmpty()) {
39
40  for (selectoption so : listOfDocxAttachmentsRelated2Agreement_Selected) {
41
42  Apttus.CustomClass.AttachmentInfo attachmentInfo = new
     Apttus.CustomClass.AttachmentInfo();
43
44  Attachment attachmentDetails = getAttachmentDetails(so.getValue());
```

```
45    attachmentInfo.Title = attachmentDetails.Name;
46    attachmentInfo.RecordId = attachmentDetails.Id;
47    attachmentsInfoList.add(attachmentInfo);
48    }
49    }
50    }
51
52    // Attachments: PDF
53    if (listOfPDFAttachmentsRelated2Agreement_Selected != null) {
54
55    if (!listOfPDFAttachmentsRelated2Agreement_Selected.isEmpty()) {
56
57    for (selectoption so : listOfPDFAttachmentsRelated2Agreement_Selected) {
58
59    Apttus.CustomClass.AttachmentInfo attachmentInfo = new
       Apttus.CustomClass.AttachmentInfo();
60
61    Attachment attachmentDetails = getAttachmentDetails(so.getValue());
62    attachmentInfo.Title = attachmentDetails.Name;
63    attachmentInfo.RecordId = attachmentDetails.Id;
64    attachmentsInfoList.add(attachmentInfo);
65    }
66    }
67    }
68
69    //
70    // Attachments
71    // DocIds is all that is needed by this API - mergeDocsToPDF2
72    //
73    for (Apttus.CustomClass.AttachmentInfo info : attachmentsInfoList) {
74
75    attachmentsIdList.add(info.RecordId);
76    }
77
78    if (getAgreement!= null &&
79    !string.isBlank(outputDocFilename) &&
80    (docFormat.equalsIgnoreCase('PDF')) &&
81    (attachmentsInfoList.size() != 0) &&
82    apiServerURL != null && apiServerURL != '' &&
83    sessionId != null && sessionId != '') {
84
85    //Agreement__c is self lookup field on Agreement
```

```
86    System.debug(apiName + ': getAgreement.Agreement__c: ' +
      getAgreement.Agreement__c);
87    Apttus__APTS_Agreement__c myAgreement = [SELECT Id, Name FROM
      Apttus__APTS_Agreement__c WHERE Id = :getAgreement.Agreement__c];
88
89    // API Parameters
90    Apttus.CustomClass.ActionParams apiParameters = new
       Apttus.CustomClass.ActionParams();
91
92    apiParameters.ParentId = myAgreement.Id;
93    apiParameters.DocIds = attachmentsIdList;
94    apiParameters.DocFileName = outputDocFilename;
95    apiParameters.PreserveRedlines = getBooleanStatus(preserveRedlinesFlag);
96    apiParameters.ProtectOutputDoc = getBooleanStatus(protectOutputDocFlag);
97    apiParameters.SessionId = sessionId;
98    apiParameters.SessionUrl = apiServerURL;
99
100   apiParameters.addAutoHeaderFooter = false;
101   apiParameters.AddHeader = true;
102   apiParameters.HeaderMode = 'Overwrite';
103   apiParameters.HeaderText= 'Contract Management';
104   apiParameters.HeaderFont = 'Arial';
105   apiParameters.HeaderFontSize = '12';
106   apiParameters.HeaderAlignment = 'Left';
107   apiParameters.AddFooter = false;
108   apiParameters.FooterMode = 'Overwrite';
109   apiParameters.FooterText= 'Apttus';
110   apiParameters.FooterFont = 'Arial';
111   apiParameters.FooterFontSize = '12';
112   apiParameters.FooterAlignment = 'Left';
113
114
115   System.debug(apiParameters);
116
117   try {
118
119   //submit request
120   Id myDocId = Apttus.MergeWebService.mergeDocsToPDF2(apiParameters);
121
122   if (myDocId != null) {
123
124   // Get details of the corresponding word document.
125   String pdfFilename = '%' + outputDocFileBasename + '%.pdf';
126   System.debug(' ' + apiName + ': Querying for: ' + pdfFilename);
```

```
127    List<Attachment> myDocIds = [SELECT Id, Name, CreatedDate FROM Attachment
       WHERE ParentID = :myAgreement.Id AND Name like :pdfFilename ORDER BY
       CreatedDate DESC];
128    Attachment myAttachment = myDocIds.get(0);
129    getGeneratedDocumentDetails(myAttachment.Id, 'PDF');
130
131    } else {
132
133    ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERROR, 'API
       mergeDocsToPDF2() returned null. Please try again.'));
134    }
135
136    } catch (Exception ex) {
137
138    System.debug('Apttus.MergeWebService.mergeDocsToPDF2: Oops!!! Caught an
       Exception 1: ' + ex.getMessage());
139    }
140
141    } else {
142    ApexPages.addMessage(new ApexPages.Message(ApexPages.Severity.ERROR,
       'Argument(s) was not set. Please try again'));
143    }
144    }
145
146
147    private Boolean getBooleanStatus(String flagValue) {
148
149    If ( flagValue.equalsIgnoreCase('True')) {
150    return true;
151    } else {
152    return false;
153    }
154    }
```

> ### ⓘ Note
>
> 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. For more information, see .Merging Multiple
> Documents to a PDF with PDF Protection vWinter-20.
> All redlines that are present in input documents are accepted prior to collation.

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService" xmlns:cus="http://soap.sforce.com/schemas/class/Apttus/CustomClass">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D0S0000000Pa8!ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At3rLd9z6BjXv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:mergeDocsToPDF2>
            <mer:mergeParams>
                <cus:AddAutoHeaderFooter>False</cus:AddAutoHeaderFooter>
                <cus:AddFooter>True</cus:AddFooter>
                <cus:AddHeader>True</cus:AddHeader>
                <cus:AddWatermark>True</cus:AddWatermark>
                <cus:DocFileName>Merged.PDF</cus:DocFileName>
                <cus:DocIds>0690S000000SvnkQAC</cus:DocIds>
                <cus:DocIds>0690S000000SvwIQAS</cus:DocIds>
                <cus:FooterAlignment>Center</cus:FooterAlignment>
                <cus:FooterFont>Tahoma</cus:FooterFont>
                <cus:FooterFontSize>8</cus:FooterFontSize>
                <cus:FooterMode>Overwrite</cus:FooterMode>
                <cus:FooterText>Copyright 2020</cus:FooterText>
                <cus:HeaderAlignment>Center</cus:HeaderAlignment>
                <cus:HeaderFont>Tahoma</cus:HeaderFont>
```

```
            <cus:HeaderFontSize>8</cus:HeaderFontSize>
            <cus:HeaderMode>Overwrite</cus:HeaderMode>
            <cus:HeaderText>Apttus</cus:HeaderText>
            <cus:ParentId>a070S000002bSFzQAM</cus:ParentId>
            <cus:PreserveRedlines>False</cus:PreserveRedlines>
            <cus:ProtectionLevel>Full Access</cus:ProtectionLevel>
            <cus:ProtectOutputDoc>True</cus:ProtectOutputDoc>
            <cus:RemoveWatermark>False</cus:RemoveWatermark>
            <cus:RetainInputHeaderFooter>False</cus:RetainInputHeaderFooter>
            <cus:SessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</cus:SessionId>
            <cus:SessionUrl>https://testmanagedclm--tbox.my.salesforce.com/services/
Soap/u/50.0/00D0S0000000Pa8</cus:SessionUrl>
            <cus:SObjectId>a070S000002bSFzQAM</cus:SObjectId>
        </mer:mergeParams>
    </mer:mergeDocsToPDF2>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
  <soapenv:Body>
    <mergeDocsToPDF2Response>
        <result>0690S000000SvzCQAS</result>
    </mergeDocsToPDF2Response>
  </soapenv:Body>
</soapenv:Envelope>
```

Creating PDF

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.

API	Signature
createPDF	*webService static Id createPDF(Apttus.CustomClass.ActionParams params)*

Request 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**
>
> 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 Parameter		

Name	Type	Description
result	Id	The Id of the generated (merged) PDF.

Code Sample

```
1  CustomClass.ActionParams objParam = new CustomClass.ActionParams();
2  objParam.SessionId = ServerInfo.getSessionId();
3  objParam.SessionUrl = ServerInfo.getServerUrl();
4  objParam.ParentId = '{parentID}';
```

```
5   objParam.DocIds = new ID[]{ID.valueOf('{docId}'),
6   ID.valueOf('{docId}')};
7   objParam.DocFileName = 'My_Merged_PDF.pdf';
8   objParam.AddFooter = true;
9   ID mergedPDF = MergeWebService.createPDF(objParam);
```

> ⓘ **Note**
>
> Values inside '{ }' in the above code sample denote an Id is required.

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService" xmlns:cus="http://
soap.sforce.com/schemas/class/Apttus/CustomClass">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:createPDF>
         <mer:params>
            <cus:DocFileName>Merged.PDF</cus:DocFileName>
            <cus:DocIds>0690S000000SvjOQAS</cus:DocIds>
            <cus:DocIds>0690S000000SvnkQAC</cus:DocIds>
```

```
            <cus:ParentId>a070S000002bSFzQAM</cus:ParentId>
            <cus:SessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</cus:SessionId>
            <cus:SessionUrl>https://testmanagedclm--tbox.my.salesforce.com/services/
Soap/u/50.0/00D0S0000000Pa8</cus:SessionUrl>
        </mer:params>
    </mer:createPDF>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <createPDFResponse>
            <result>0690S000000SvzWQAS</result>
        </createPDFResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Merging Proposal Documents into a single PDF Document

Use this API to package multiple proposal documents together into a singled merged PDF document. Implementation requires creation of a custom Visualforce page to make use of the API for document packaging purposes.

API	Signature
createPDFPackage	*webService static Id createPDFPackage(Apttus_Proposal.CustomClass.ActionParams params)*

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.
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

```
1    // Attachments
2        //
3        List<Apttus_Proposal.CustomClass.AttachmentInfo>
     attachmentsInfoList = new
      List<Apttus_Proposal.CustomClass.AttachmentInfo>();
4        // Attachment: Primary
```

```
 5          Apttus_Proposal.CustomClass.AttachmentInfo attachmentInfo = new
     Apttus_Proposal.CustomClass.AttachmentInfo();
 6          ...
 7          ...
 8          attachmentInfo.Title           = attachmentDetails.Name;
 9          attachmentInfo.RecordId         = attachmentDetails.Id;
10          attachmentsInfoList.add(attachmentInfo);
11
12          // Attachments: Docx
13          for (selectoption so :
     listOfDocxAttachmentsRelated2Proposal_Selected) {
14
15              Apttus_Proposal.CustomClass.AttachmentInfo attachmentInfo =
     new Apttus_Proposal.CustomClass.AttachmentInfo();
16              ...
17              ...
18              attachmentInfo.Title           = attachmentDetails.Name;
19              attachmentInfo.RecordId         = attachmentDetails.Id;
20              attachmentsInfoList.add(attachmentInfo);
21
22          }
23          // Attachments: PDFs
24          for (selectoption so :
     listOfPDFAttachmentsRelated2Proposal_Selected) {
25
26              Apttus_Proposal.CustomClass.AttachmentInfo attachmentInfo =
     new Apttus_Proposal.CustomClass.AttachmentInfo();
27              ...
28              ...
29              attachmentInfo.Title           = attachmentDetails.Name;
30              attachmentInfo.RecordId         = attachmentDetails.Id;
31              attachmentsInfoList.add(attachmentInfo);
32
33          }
34          //
35          // External Links
36          //
37          List<Apttus_Proposal.CustomClass.ExternalLink>
     externalLinksInfoList = new
     List<Apttus_Proposal.CustomClass.ExternalLink>();
38          if ( !string.isBlank(externalLinks) ) {
39
40              String[] arrayOfURLs = parseURLsCSV(externalLinks);
41
42              for (String str : arrayOfURLs) {
```

```
43
44                    String url      = str.trim();
45                    String filename = getFilenameFromURL(url);
46
47                    Apttus_Proposal.CustomClass.ExternalLink externalLinkInfo
     = new Apttus_Proposal.CustomClass.ExternalLink();
48                    externalLinkInfo.Title  = filename;
49                    externalLinkInfo.Url    = url;
50                    externalLinksInfoList.add(externalLinkInfo);
51                }
52            }
53            // API Parameters
54            Apttus_Proposal.CustomClass.ActionParams apiParameters  = new
     Apttus_Proposal.CustomClass.ActionParams();
55            apiParameters.ParentId          = myProposal.Id;
56            apiParameters.Attachments       = attachmentsInfoList;
57            apiParameters.ExternalLinks      = externalLinksInfoList;
58            apiParameters.DocFileName        = 'outputCollatedPDFFilename.pdf';
59            apiParameters.SessionId          = sessionId;
60            apiParameters.SessionUrl         = apiServerURL;
61            try {
62
63                //submit request
64                Id myDocId =
     Apttus_Proposal.MergeWebService.createPDFPackage(apiParameters);
65
66            } catch (Exception ex) {
67
68                System.debug('Apttus.MergeWebService.createPDFPackage: Oops!!!
     Caught an Exception: ' + ex);
69            }
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService" xmlns:cus="http://soap.sforce.com/schemas/class/Apttus/CustomClass">
   <soapenv:Header>
      <mer:SessionHeader>
         <mer:sessionId>00D0S0000000Pa8!ARUAQJ53E09loYXezDoz9WVOJugDkLwI58ibwr3Iefz8bY7_HNQ5j3jV302ejFtvD2n1wEI_VL_78sOCL76iVZ5ywpCZaAJs</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:createPDF>
         <mer:params>
            <cus:Attachments>
               <cus:RecordId>0690S000000SxbRQAS</cus:RecordId>
               <cus:Title>Test_DemoTemplate-KK_2020-07-17_1.0.0.doc</cus:Title>
            </cus:Attachments>
            <cus:Attachments>
               <cus:RecordId>0690S000000SxYhQAK</cus:RecordId>
               <cus:Title>Test_00AJ_Template with Clause_2020-07-17_1.0.0.doc</cus:Title>
            </cus:Attachments>
            <cus:DocFileName>PDF_Package.PDF</cus:DocFileName>
            <cus:DocIds>0690S000000SvjOQAS</cus:DocIds>
            <cus:DocIds>0690S000000SvnkQAC</cus:DocIds>
            <cus:ParentId>a070S000002bSFzQAM</cus:ParentId>
            <cus:SessionId>00D0S0000000Pa8!ARUAQJ53E09loYXezDoz9WVOJugDkLwI58ibwr3Iefz8bY7_HNQ5j3jV302ejFtvD2n1wEI_VL_78sOCL76iVZ5ywpCZaAJs</cus:SessionId>
            <cus:SessionUrl>https://testmanagedclm--tbox.my.salesforce.com/services/Soap/u/50.0/00D0S0000000Pa8</cus:SessionUrl>
         </mer:params>
      </mer:createPDF>
   </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
    <soapenv:Body>
        <createPDFResponse>
            <result>0690S000000T0XIQA0</result>
        </createPDFResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

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.

API	Signature
createWordPackage	*webService static Id createWordPackage(Apttus.CustomClass.ActionParams params)*

Request Parameters			
Name	Type	Description	Required?
ParentId	ID	The ID of the parent object associated with the result.	Yes
Attachments	List<Apttus.CustomClass.AttachmentInfo>	List of all documents in the order to be packaged.	Yes

Request Parameters			
Name	**Type**	**Description**	**Requi red?**
ExternalLin ks	List<Apttus.Custom Class.ExternalLink>	List of external links to be embedded in document. (*not currently supported*)	Yes
DocFileNa me	String	Name of the packaged document file (.doc or .docx).	Yes
ProtectionL evel	String	Protection level of the document generated.	Yes
AddWater mark	Boolean	Indicates whether to add a watermark to the document.	Yes
RemoveWa termark	Boolean	Indicates whether to remove a watermark from the document.	Yes
AddAutoHe aderFooter	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.	Yes
HeaderTex t	String	Text to include in the document header.	Yes
FooterText	String	Text to include in the document footer.	Yes
PreserveRe dlines	Boolean	Indicates whether the redlines in the input document will be preserved/ accepted in the packaged document. The default value is false.	Yes
SessionId	ID	The Session ID to use for callback.	Yes
SessionUrl	String	The Server URL to use for callback.	Yes

Request Parameters			
Name	Type	Description	Requi red?
RetainInput HeaderFoo ter	Boolean	Indicates whether the merged document retains the existing header and footer of the original documents and page numbers are cumulative.	Optio nal
Cumulative PageNumb er	Boolean	Indicates whether the merged document page numbers are cumulative.	Optio nal

ⓘ 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.

When RetainInputHeaderFooter is set to True, the remaining parameters (CumulativePageNumber, and AddAutoHeaderFooter) are not evaluated. When CumulativePageNumber is set to True, the combined document has cumulative page numbers. When AddAutoHeaderFooter is set to True, then the header and footer are inserted according to the input provided. The following table provides a combination of inputs and their results.

Scenario	RetainInputHe aderFooter	CumulativeP ageNumber	AddAutoHea derFooter	Result
Documents with header and footer	True	True	False	• The existing header and footer of the documents are retained. • The default footer is not added as the RetainInputHeaderF ooter parameter is set to True.

Scenario	RetainInputHeaderFooter	CumulativePageNumber	AddAutoHeaderFooter	Result
Documents without header and footer	True	True	False	• The default footer is not added as the RetainInputHeaderFooter parameter is set to True.
Documents with header and footer	False	True	False	• The existing header and footer of the documents are removed. • The default footer is inserted and the footer has cumulative page numbers.
Documents without header and footer	False	True	False	• The default footer is inserted and the footer has cumulative page numbers.
Documents with header and footer	True	False	False	• The existing header and footer of the documents are retained. • The default footer is not added as the RetainInputHeaderFooter parameter is set to True.

Scenario	RetainInputHeaderFooter	CumulativePageNumber	AddAutoHeaderFooter	Result
Documents without header and footer	True	False	False	• The existing header and footer of the documents are retained. • The default footer is not added as the RetainInputHeaderFooter parameter is set to True.
Documents with header and footer	False	False	True	• The existing header and footer of the documents are removed. • The header and footer are inserted with the default page number format.
Documents without header and footer	False	False	True	• The existing header and footer of the documents are removed. • The header and footer are inserted with the default page number format.

Response Parameter		
Name	Type	Description
result	ID	Returns the ID of the merged DOCX document.

Code Sample

```
1   // attachments
2   List<Apttus.CustomClass.AttachmentInfo> attachments = new
     List<Apttus.CustomClass.AttachmentInfo>();
3   Apttus.CustomClass.AttachmentInfo attInfo = new
     Apttus.CustomClass.AttachmentInfo();
4   attInfo.Title = 'Agreement-1';
5   attInfo.RecordId = attSO.Id;
6
7   attachments.add(attInfo);
8
9   Apttus.CustomClass.AttachmentInfo attInfo2 = new
     Apttus.CustomClass.AttachmentInfo();
10  attInfo2.Title = 'Agreement-2';
11  attInfo2.RecordId = attSO2.Id;
12
13  attachments.add(attInfo);
14
15  // external links (not supported)
16  List<Apttus.CustomClass.ExternalLink> links = new
     List<Apttus.CustomClass.ExternalLink>();
17
18  Apttus.CustomClass.ExternalLink linkInfo = new
     Apttus.CustomClass.ExternalLink();
19  linkInfo.Title = 'Drawing-1';
20  linkInfo.Url = 'https://drive.google.com/doc1.docx';
21
22  links.add(linkInfo);
23
24  Apttus.CustomClass.ExternalLink linkInfo2 = new
     Apttus.CustomClass.ExternalLink();
25  linkInfo2.Title = 'Drawing-2';
26  linkInfo2.Url = 'https://drive.google.com/doc2.docx';
27
28  links.add(linkInfo2);
29
30  // create action parameters
31  Apttus.CustomClass.ActionParams  params = new
     Apttus.CustomClass.ActionParams();
32
```

```
33    params.ParentId = agreementSO.Id;
34    params.Attachments = attachments;
35    params.ExternalLinks = links;
36    params.AddAutoHeaderFooter = true;
37    params.ProtectionLevel = AgreementProtection.LEVEL_FULL_ACCESS;
38    params.DocFileName = 'Agreement-Merged.docx';
39    params.AddWatermark = true;
40    params.RemoveWatermark = false;
41    params.HeaderText = 'Agreement Id: 0123456789';
42    params.FooterText = 'Date Created: 11/27/2011 7:23:15 PM';
43    params.PreserveRedlines = true;
44    params.SessionId = ServerInfo.getSessionId();
45    params.SessionUrl = ServerInfo.getServerUrl();
46    params.RetainInputHeaderFooter = true;
47    params.CumulativePageNumber = true;
48
49    ID docId = Apttus.MergeWebService.createWordPackage(params);
50
51    System.debug('Merged Doc ID=' + docId);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="
http://soap.sforce.com/schemas/class/Apttus/MergeWebService" xmlns:cus="http://
soap.sforce.com/schemas/class/Apttus/CustomClass">
    <soapenv:Header>
        <mer:SessionHeader>
```

```
        <mer:sessionId>00D0S0000000Pa8!
ARUAQJ53E09loYXezDoz9WVOJugDkLwI58ibwr3Iefz8bY7_HNQ5j3jV302ejFtvD2n1wEI_VL_78sOCL76iV
Z5ywpCZaAJs</mer:sessionId>
      </mer:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <mer:createWordPackage>
         <mer:params>
            <cus:AddAutoHeaderFooter>True</cus:AddAutoHeaderFooter>
            <cus:AddFooter>False</cus:AddFooter>
            <cus:AddHeader>False</cus:AddHeader>
            <cus:AddWatermark>False</cus:AddWatermark>
            <cus:Attachments>
               <cus:RecordId>0690S000000SxbRQAS</cus:RecordId>
               <cus:Title>Test_DemoTemplate-KK_2020-07-17_1.0.0.doc</cus:Title>
            </cus:Attachments>
            <cus:Attachments>
               <cus:RecordId>0690S000000SxYhQAK</cus:RecordId>
               <cus:Title>Test_00AJ_Template with Clause_2020-07-17_1.0.0.doc</cus:Ti
tle>
            </cus:Attachments>
            <cus:CumulativePageNumber>True</cus:CumulativePageNumber>
            <cus:DocFileName>Package.docx</cus:DocFileName>
            <cus:FooterText>Copyright 2020</cus:FooterText>
            <cus:HeaderText>Apttus</cus:HeaderText>
            <cus:ParentId>a070S000002bVP7QAM</cus:ParentId>
            <cus:PreserveRedlines>False</cus:PreserveRedlines>
            <cus:ProtectionLevel>Full Access</cus:ProtectionLevel>
            <cus:ProtectOutputDoc>True</cus:ProtectOutputDoc>
            <cus:RemoveWatermark>False</cus:RemoveWatermark>
            <cus:RetainInputHeaderFooter>True</cus:RetainInputHeaderFooter>
            <cus:SessionId>00D0S0000000Pa8!
ARUAQJ53E09loYXezDoz9WVOJugDkLwI58ibwr3Iefz8bY7_HNQ5j3jV302ejFtvD2n1wEI_VL_78sOCL76iV
Z5ywpCZaAJs</cus:SessionId>
            <cus:SessionUrl>https://testmanagedclm--tbox.my.salesforce.com/services/
Soap/u/50.0/00D0S0000000Pa8</cus:SessionUrl>
         </mer:params>
      </mer:createWordPackage>
   </soapenv:Body>
</soapenv:Envelope>
```

Merging Documents

This API allows you to merge multiple documents into a single document. The supported file types are DOC, DOCX, XLS, XLSX, PPT, PPTX, and PDF.

API	Signature
mergeDocuments	*webService static Id mergeDocuments(Apttus.CustomClass.ActionParams params)*
Request Parameters	

Name	Type	Description	Required?
ParentId	ID	The ID of the parent object associated with the result.	Yes
sObjectId	ID	The ID of the standard object	Yes
Attachments	List<Apttus.CustomClass.AttachmentInfo>	List of all documents in the order to be merged.	Yes
ExternalLinks	List<Apttus.CustomClass.ExternalLink>	List of external links to be embedded in the document.	Optional

Request Parameters			
Name	Type	Description	Required?
DocFileName e	String	Name of the packaged document file (.doc or .docx).	Yes
ProtectionLevel	String	Protection level of the document generated.	Yes
AddWatermark	Boolean	Indicates whether to add a watermark to the document.	Yes
RemoveWatermark	Boolean	Indicates whether to remove a watermark from the document.	Yes
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.	Yes
HeaderText	String	Text to include in the document header.	Yes
FooterText	String	Text to include in the document footer.	Yes
PreserveRedlines	Boolean	Indicates whether the redlines in the input document will be preserved/ accepted in the packaged document. The default value is false.	Yes
SessionId	ID	The Salesforce Session ID.	Yes
SessionUrl	String	The Salesforce Server URL.	Yes

Request Parameters			
Name	Type	Description	Required?
RetainInput HeaderFoot er	Boolean	Indicates whether the merged document retains the existing header and footer of the original documents and page numbers are cumulative.	Option al
Cumulative PageNumbe r	Boolean	Indicates whether the merged document page numbers are cumulative.	Option al

Response Parameter		
Name	Type	Description
docId	ID	The id of the generated PDF document.

Code Sample

```
1   {"SessionId":"00D0b000000DwSP!
    AQcAQOVWzYqVxU8jtOXxaQJe43sDdhLe4fsuRXsVri9ztEp8huD1u8ugJ3XI02CwbVssgtPdwm
    A4cQWuRnvJHJAFjWJZYZiX",
2   "SessionUrl":"https://yogi-dev2-dev-ed--c.na57.visual.force.com/services/
    Soap/u/50.0/00D0b000000DwSP",
3   "ParentId":"a010b00000k3f69AAA",
4   "sObjectId":"a010b00000k3f69AAA",
5   "Attachments":[{"RecordId":"0690b00000CBrXVAA1",
6   "Title":"test333.docx",
7   "docType":"application/vnd.openxmlformats-
    officedocument.wordprocessingml.document"},
8   {"RecordId":"0690b00000CBrXBAA1",
9   "Title":"test345.docx",
10  "docType":"application/vnd.openxmlformats-
    officedocument.wordprocessingml.document"}],
11  "ExternalLinks":[],
12  "DocFileName":"MergedDocument",
13  "AddWatermark":true,
14  "RemoveWatermark":false,
15  "AddAutoHeaderFooter":false,
```

```
16    "HeaderText":"Apttus",
17    "FooterText":"2020 Copyright",
18    "PreserveRedlines":true,
19    "RetainInputHeaderFooter":false,
20    "CumulativePageNumber":false}"
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService" xmlns:cus="http://soap.sforce.com/schemas/class/Apttus/CustomClass">
    <soapenv:Header>
        <mer:SessionHeader>
            <mer:sessionId>00D0S0000000Pa8!ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At3rLd9z6BjXv</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:mergeDocuments>
            <mer:Params>
                <cus:AddAutoHeaderFooter>False</cus:AddAutoHeaderFooter>
                <cus:AddFooter>True</cus:AddFooter>
                <cus:AddHeader>True</cus:AddHeader>
                <cus:AddWatermark>True</cus:AddWatermark>
                <cus:Attachments>
                    <cus:RecordId>0690S000000SxbRQAS</cus:RecordId>
                    <cus:Title>Test_DemoTemplate-KK_2020-07-17_1.0.0.doc</cus:Title>
                </cus:Attachments>
```

```
            <cus:Attachments>
                <cus:RecordId>0690S000000SxYhQAK</cus:RecordId>
                <cus:Title>Test_00AJ_Template with Clause_2020-07-17_1.0.0.doc</cus:Ti
tle>
            </cus:Attachments>
            <cus:DocFileName>Merged.PDF</cus:DocFileName>
            <cus:DocIds>0690S000000SvnkQAC</cus:DocIds>
            <cus:DocIds>0690S000000SvwIQAS</cus:DocIds>
            <cus:FooterAlignment>Center</cus:FooterAlignment>
            <cus:FooterFont>Tahoma</cus:FooterFont>
            <cus:FooterFontSize>8</cus:FooterFontSize>
            <cus:FooterMode>Overwrite</cus:FooterMode>
            <cus:FooterText>Copyright 2020</cus:FooterText>
            <cus:HeaderAlignment>Center</cus:HeaderAlignment>
            <cus:HeaderFont>Tahoma</cus:HeaderFont>
            <cus:HeaderFontSize>8</cus:HeaderFontSize>
            <cus:HeaderMode>Overwrite</cus:HeaderMode>
            <cus:HeaderText>Apttus</cus:HeaderText>
            <cus:ParentId>a070S000002bSFzQAM</cus:ParentId>
            <cus:PreserveRedlines>False</cus:PreserveRedlines>
            <cus:ProtectionLevel>Full Access</cus:ProtectionLevel>
            <cus:ProtectOutputDoc>True</cus:ProtectOutputDoc>
            <cus:RemoveWatermark>False</cus:RemoveWatermark>
            <cus:RetainInputHeaderFooter>False</cus:RetainInputHeaderFooter>
            <cus:SessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At
3rLd9z6BjXv</cus:SessionId>
            <cus:SessionUrl>https://testmanagedclm--tbox.my.salesforce.com/services/
Soap/u/50.0/00D0S0000000Pa8</cus:SessionUrl>
            <cus:SObjectId>a070S000002bSFzQAM</cus:SObjectId>
        </mer:Params>
    </mer:mergeDocuments>
   </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
   <soapenv:Body>
      <mergeDocumentsResponse>
```

```
            <result>0690S000000RvzCWRS</result>
        </mergeDocumentsResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Regenerate Documents with Redlines

This API allows you to regenerate agreement documents with redlines.

API	Signature
regenerateDocWithRedlines	*webService static Id regenerateDocWithRedlines(Apttus.CustomClass.DocGenParam params)*
Request Parameters	

Name	Type	Description	Required?
templateId	ID	The ID of the template	Yes
versionDetailId	ID	The Id of the document version	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
isDraft	Boolean	Indicates whether a draft watermark should be added to the document.	Yes

Request Parameters			
Name	Type	Description	Required?
SObjectId	ID	The Id of the object which holds data for merge fields.	
sourceDocumentId	ID	The Id of the document to regenerate. The document is used to compare for redlines.	Yes
sessionid	String	The Salesforce session ID.	Yes
sessionUrl	String	The Salesforce server Url.	Yes

Response Parameter		
Name	Type	Description
result	Boolean	Indicates whether the document was regenerated successfully.

Code Sample

```
ID templateId = 'a090x00000oiMeoAAE';
ID agreementId = 'a070x000007Fed0AAC';
ID versionDetailId = 'a0h0x000003HYXUAA4';
String pLevel = '0';
String docFormat = 'DOCX';
Boolean isDraft = false;
ID sourceDocumentId = '0690x0000021Hy4AAE';
CustomClass.DocGenParam docGenParam = New CustomClass.DocGenParam(templateId,
versionDetailId, pLevel, docFormat, isDraft, SObjectId, sourceDocumentId, sessionid,
sessionUrl);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<soapenv:Envelope
    xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
    xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService"
    xmlns:cus="http://soap.sforce.com/schemas/class/Apttus/CustomClass">
    <soapenv:Header>
            <mer:SessionHeader>
            <mer:sessionId>?</mer:sessionId>
        </mer:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <mer:regenerateDocWithRedlines>
            <mer:params>
                <cus:AcceptRedlines>False</cus:AcceptRedlines>
                <cus:DocFormat>PDF</cus:DocFormat>
                <cus:IsDraft>True</cus:IsDraft>
                <cus:ProtectionLevel>Full Access</cus:ProtectionLevel>
                <cus:ReviewerName>Conga</cus:ReviewerName>
                <cus:SessionId>00D0S0000000Pa8!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZlP5TQivHyO5biv
we.toaF9MrQ</cus:SessionId>
                <cus:SessionUrl>https://testmanaged--5s20minor.my.salesforce.com/
services/Soap/u/50.0/00D020000008lUh</cus:SessionUrl>
                <cus:SObjectId>0015500000YAdXR</cus:SObjectId>
                <cus:SourceDocumentId>a07020000008w91</cus:SourceDocumentId>
                <cus:TemplateId>a09R000000AjMCy</cus:TemplateId>
                <cus:VersionDetailId>a6v0S0000009DEY</cus:VersionDetailId>
            </mer:params>
        </mer:regenerateDocWithRedlines>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
    <soapenv:Body>
        <regenerateDocWithRedlines>
            <result>true</result>
        </regenerateDocWithRedlines>
    </soapenv:Body>
</soapenv:Envelope>
```

Author Web Service

The Author Web Service API contains all the services related to files or documents and can be used with various operations related to X-Author.

You can invoke APIs in Author Web Service using the following command:

```
Apttus.AuthorWebService.<Name of the Function>
where the name of the function is API Name and its parameters.
```

You can use the Author web service APIs to complete the following tasks:

- Initiating Parallel Review
- Ending Parallel Review
- Getting Word Document Information for Parent with Files
- Subscribing to Document Lock Release Notification

Initiating Parallel Review

This initiates the parallel review for a document that is part of an Agreement. The document must be part of the agreement document version object and document versioning must be enabled.

API	Signature
initiateParallelReview	*webService static void initiateParallelReview(Id attachmentId, Id agreementId, Id documentVersionDetailId, String emailSubject, String emailBody, List reviewersInfo)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
attachmentId	ID	Id of the document that is to be reviewed.	Yes
agreementId	ID	Id of the agreement.	Yes
documentVersionDetailId	ID	Id of the document version.	Yes
emailSubject	String	Subject of the review email.	Yes
emailBody	String	Body of the review email.	Yes
List<ReviewerWrapper> reviewersInfo	List	List of reviewers.	Yes

Code Sample

```
Id attachmentId = '0691l000001qT6kAAE';
Id agreementId = 'a0G1l000004ENBsEAO';
Id documentVersionDetailId = 'a0m1l000007aCKGAA2';
List<Apttus.ReviewerWrapper> reviewersList = new List<Apttus.ReviewerWrapper>();
List<Apttus.ReviewerWrapper.ContentControls> contentControls = null;
Apttus.ReviewerWrapper reviewerWrapper = new Apttus.ReviewerWrapper('0051l000006MJuvA
AG', 'recipientname', 'uthakkar@conga.com', contentControls);
reviewersList.add(reviewerWrapper);
Apttus.AuthorWebService.initiateParallelReview(attachmentId, agreementId,
documentVersionDetailId, 'Email Subject', 'Email Body in HTML', reviewersList);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```xml
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:aut="
http://soap.sforce.com/schemas/class/Apttus/AuthorWebService" xmlns:rev="http://
soap.sforce.com/schemas/class/Apttus/ReviewerWrapper">
    <soapenv:Header>
        <aut:SessionHeader>
            <aut:sessionId>00D0S0000000Pa8!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZlP5TQivHyO5biv
we.toaF9MrQ</aut:sessionId>
        </aut:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <aut:initiateParallelReview>
            <aut:attachmentId>00P0S000002S0kY</aut:attachmentId>
            <aut:agreementId>a070S000002bSKV</aut:agreementId>
            <aut:documentVersionDetailId>a1y0S000000K2aN</aut:documentVersionDetailId>
            <aut:emailSubject>Request for review</aut:emailSubject>
            <aut:emailBody>Please review and approve the attached document.</aut:emailBo
dy>
            <aut:reviewersInfo>
                <rev:reviewerEmail>abc@test.com</rev:reviewerEmail>
                <rev:reviewerName>abc</rev:reviewerName>
            </aut:reviewersInfo>
            <aut:reviewersInfo>
                <rev:reviewerEmail>xyz@test.com</rev:reviewerEmail>
                <rev:reviewerName>xyz</rev:reviewerName>
            </aut:reviewersInfo>
        </aut:initiateParallelReview>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
```

```
    <soapenv:Body>
        <initiateParallelReviewResponse/>
    </soapenv:Body>
</soapenv:Envelope>
```

Ending Parallel Review

This ends the parallel review for a document belonging to a particular review cycle.

API	Signature
endParallelReview	*webService static void endParallelReview(Id reviewCycleId, String emailId, Id documentVersionDetailId, String comment)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
reviewCycleId	ID	Id of the review cycle.	Yes
emailId	String	Email Id of the reviewer.	Yes
documentVersionDetailId	ID	Id of the document version.	Yes
comment	String	Reviewer comment.	Optional

Code Sample

```
ID reviewCycleId = 'a2a4N000000X86gQAC';
String emailId = 'recipientemail@email.com';
ID documentVersionDetailId = 'a1y0S000000TsvxQAC' ;
String comment = 'Review done Please incorporate changes ';
emailId
documentVersionDetailId
documentVersionDetailId );
AuthorWebService.endParallelReview(reviewCycleId ,
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:aut="http://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
   <soapenv:Header>
      <aut:SessionHeader>
         <aut:sessionId>00D0S0000000Pa8!ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZlP5TQivHyO5bivwe.toaF9MrQ</aut:sessionId>
      </aut:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <aut:endParallelReview>
         <aut:reviewCycleId>a6v0S0000009DEY</aut:reviewCycleId>
         <aut:emailId>msuthrave@apttus.com</aut:emailId>
         <aut:documentVersionDetailId>a1y0S000000K2bB</aut:documentVersionDetailId>
         <aut:comment>End review</aut:comment>
      </aut:endParallelReview>
   </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
```

```
    <soapenv:Body>
        <endParallelReviewResponse/>
    </soapenv:Body>
</soapenv:Envelope>
```

Getting Word Document Information for Parent with Files

This method returns the list of word documents of type files, based on parent id passed in parameter.

API	Signature
getWordDocumentInfosForParentWithFiles	*webService static List getWordDocumentInfosForParentWithFiles(Id parentId)*

Parameters		
Name	**Type**	**Description**
`parentId`	ID	The id of the parent agreement.

Response		
Name	**Type**	**Description**
`List`	ContentDocumentLink	Returns the list of content document link.

Code Sample

```
1  ID agreementId = 'a0Y61000002K6IR';
2  List<ContentDocumentLink> lstContentDocumentLink =
   Apttus.AuthorWebService.getWordDocumentInfosForParentWithFiles(agreementId
   );
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:aut="http://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
   <soapenv:Header>
      <aut:SessionHeader>
         <aut:sessionId>00D0S0000000Pa8!ARUAQGAA1VTGcAG1zxylmAb1RJmiUnspuO5dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4veO1At3rLd9z6BjXv</aut:sessionId>
      </aut:SessionHeader>
   </soapenv:Header>
   <soapenv:Body>
      <aut:getWordDocumentInfosForParentWithFiles>
         <aut:parentId>a070S000002bUEyQAM</aut:parentId>
      </aut:getWordDocumentInfosForParentWithFiles>
   </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/AuthorWebService" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
   <soapenv:Body>
      <getWordDocumentInfosForParentWithFilesResponse>
            <result xsi:type="ContentDocumentLink">
```

```xml
        <Id>06A0S000000lhTHUAY</Id>
        <ContentDocument xsi:type="ContentDocument">
            <Id>0690S000000SviVQAS</Id>
            <CreatedById>0050S000001GAHMQA4</CreatedById>
            <FileExtension>doc</FileExtension>
            <FileType>WORD</FileType>
            <LastModifiedById>0050S000001GAHMQA4</LastModifiedById>
            <LastModifiedDate>2020-07-16T09:56:19.000Z</LastModifiedDate>
            <LatestPublishedVersion xsi:type="ContentVersion">
                <Id>0680S000000SzTGQA0</Id>
                <ContentSize>73929</ContentSize>
            </LatestPublishedVersion>
            <LatestPublishedVersionId>0680S000000SzTGQA0</LatestPublishedVersionId>
            <OwnerId>0050S000001GAHMQA4</OwnerId>
            <SystemModstamp>2020-07-16T09:56:37.000Z</SystemModstamp>
            <Title>Corporate-Original_Template with 2 Smart Clauses</Title>
        </ContentDocument>
        <ContentDocumentId>0690S000000SviVQAS</ContentDocumentId>
        <LinkedEntityId>a070S000002bUEyQAM</LinkedEntityId>
    </result>
    <result xsi:type="ContentDocumentLink">
        <Id>06A0S000000lhTJUAY</Id>
        <ContentDocument xsi:type="ContentDocument">
            <Id>0690S000000SviWQAS</Id>
            <CreatedById>0050S000001GAHMQA4</CreatedById>
            <FileExtension>doc</FileExtension>
            <FileType>WORD</FileType>
            <LastModifiedById>0050S000001GAHMQA4</LastModifiedById>
            <LastModifiedDate>2020-07-16T09:56:21.000Z</LastModifiedDate>
            <LatestPublishedVersion xsi:type="ContentVersion">
                <Id>0680S000000SzTHQA0</Id>
                <ContentSize>14391</ContentSize>
            </LatestPublishedVersion>
            <LatestPublishedVersionId>0680S000000SzTHQA0</LatestPublishedVersionId>
            <OwnerId>0050S000001GAHMQA4</OwnerId>
            <SystemModstamp>2020-07-16T09:56:38.000Z</SystemModstamp>
            <Title>Corporate-NR_Test_001_Regenerated_ct_2.0_2020-01-27</Title>
        </ContentDocument>
        <ContentDocumentId>0690S000000SviWQAS</ContentDocumentId>
        <LinkedEntityId>a070S000002bUEyQAM</LinkedEntityId>
    </result>
    <result xsi:type="ContentDocumentLink">
        <Id>06A0S000000lhTMUAY</Id>
        <ContentDocument xsi:type="ContentDocument">
```

```
                    <Id>0690S000000SviaQAC</Id>
                    <CreatedById>0050S000001GAHMQA4</CreatedById>
                    <FileExtension>docx</FileExtension>
                    <FileType>WORD_X</FileType>
                    <LastModifiedById>0050S000001GAHMQA4</LastModifiedById>
                    <LastModifiedDate>2020-07-16T09:56:20.000Z</LastModifiedDate>
                    <LatestPublishedVersion xsi:type="ContentVersion">
                        <Id>0680S000000SzTLQA0</Id>
                        <ContentSize>39544</ContentSize>
                    </LatestPublishedVersion>
                    <LatestPublishedVersionId>0680S000000SzTLQA0</LatestPublishedVersionId>
                    <OwnerId>0050S000001GAHMQA4</OwnerId>
                    <SystemModstamp>2020-07-16T09:56:30.000Z</SystemModstamp>
                    <Title>RS 11 Mar 02_Redlines_Web OL Font Template_2020-03-11</Title>
                </ContentDocument>
                <ContentDocumentId>0690S000000SviaQAC</ContentDocumentId>
                <LinkedEntityId>a070S000002bUEyQAM</LinkedEntityId>
            </result>
        </getWordDocumentInfosForParentWithFilesResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Subscribing to Document Lock Release Notification

This API allows you to subscribe to document lock release notification during online contract collaboration.

API	Signature
subscribeToDocumentLock	*webService static Boolean subscribeToDocumentLock(Id documentVersionId, Id agreementId, Id userId)*

Request Parameters			
Name	**Type**	**Description**	**Required?**
documentversionId	ID	Id of the document version	Yes
agreementId	ID	Id of the document	Yes

Request Parameters			
Name	Type	Description	Required?
userID	ID	User ID of the subscriber	Yes

Response Parameter		
Name	Type	Description
result	Boolean	Indicates whether the subscription to document lock release notification was successful.

Code Sample

```
id documentversionId ='a6v0S0000009DEY';
id agreementId = 'a07020000008w9BAAQ';
id CurrentUserID = getCurrentUser().Id;
Apttus.AuthorWebservice.subscribeToDocumentLock(documentversionId, agreementId,
CurrentUserID);
```

Integration Details

Use the following information in your integrations with Apttus Contract Management Web Services API. For information on how to get started, refer to Integrating Conga CLM with External Systems.

API Prerequisites

None.

Request/Response XML

Example Request

```
<?xml version="1.0" encoding="UTF-8"?>
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:aut="
http://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
   <soapenv:Header>
```

```
    <aut:SessionHeader>
        <aut:sessionId>00D0S0000000Pa8!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZlP5TQivHyO5biv
we.toaF9MrQ</aut:sessionId>
    </aut:SessionHeader>
    </soapenv:Header>
    <soapenv:Body>
        <aut:subscribeToDocumentLock>
            <aut:documentversionId>a6v0S0000009DEY</aut:reviewCycleId>
            <aut:agreementId>a07020000008w9BAAQ</aut:emailId>
            <aut:CurrentUserID>0050S000002KSZwQAO</aut:documentVersionDetailId>
        </aut:subscribeToDocumentLock>
    </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/AuthorWebService">
    <soapenv:Body>
        <subscribeToDocumentLockResponse>
            <result>true</result>
        </subscribeToDocumentLockResponse>
    </soapenv:Body>
</soapenv:Envelope>
```

Callback Classes

Apttus Contract Management allows you to create and register custom code in the form of callback class for the following operations:

- IAgreementLifecycleCallback2 and IDynamicSectionCallback2

IAgreementLifecycleCallback2 and IDynamicSectionCallback2

Contract Management on salesforce provides the following callback interfaces:

IAgreementLifecycleCallback2

The administrator can use this callback class to handle the Agreement lifecycle specific actions like afterCreate , afterClone, afterTerminate, afterAmend, and so on.

IDynamicSectionCallback2

The administrator can use this callback class to handle the dynamic section when an agreement document is generated.

To enable the callback interface for IAgreementLifecycleCallback2

1. Write a class implementing the Interface.
2. Overwrite the methods and write what you want to add in a specific action method.
3. Go to **Setup** > **Custom Settings** > **Comply Custom Classes**.
4. Create a New Entry.
5. Execute actual Action and check the log.
6. Create Apex Class implementing the Callback Interface.

Callback Methods Invoked

S.No	Callback Method	When is the callback method invoked
01	afterActivate	After Agreement is Activated
02	afterAmend	After Agreement is amended
03	afterCancel	After Agreement is canceled
04	afterClone	After Agreement is Cloned
05	afterComplete	Called After Every Action (ActionType is Sent as Parameter to the method)
06	afterCreate	After New Agreement is created
07	afterCreateChild	After New Child Agreement is Created
08	afterCreateExecuted	After create of Store Executed Agreement

S.No	Callback Method	When is the callback method invoked
09	afterCreateFromOpportunity	After New Agreement is created for Opportunity
10	afterCreateOffline	After offline Agreement is created
11	afterExpire	After Agreement is expired
12	afterRenew	After Agreement is Renewed
13	afterTerminate	After Agreement is Terminated

IAgreementLifecycleCallback2

```
global class APTS_CustomAgreementLifecycleCallback implements
 CustomClass.IAgreementLifecycleCallback2 {

    global void afterActivate(APTS_Agreement__c originalSO,
CustomClass.ActivationType activationType){
        logMessage('Action after Activate' , 'After Activate');
    }

    global void afterAmend(APTS_Agreement__c originalSO, APTS_Agreement__c
amendmentSO){
        logMessage('Action after Amend' , 'After Amend');
    }
    global void afterCancel(APTS_Agreement__c agreementSO){
        logMessage('Action after Cancel' , 'After Cancel');
    }
    global void afterClone(APTS_Agreement__c originalSO, APTS_Agreement__c cloneSO){
        logMessage('Action after Clone' , 'After Clone');
    }
    global void afterComplete(APTS_Agreement__c agreementSO, CustomClass.ActionType
actionType){
        logMessage('Action after Complete' , ''+actionType);
    }
    global void afterCreate(APTS_Agreement__c agreementSO){
        logMessage('Action after Create' , 'After Create');
    }
```

```
    global void afterCreateChild(APTS_Agreement__c parentSO, APTS_Agreement__c
childSO){
        logMessage('Action after Create Child ' , 'After Create '+childSo);
    }
    global void afterCreateExecuted(APTS_Agreement__c agreementSO){
        logMessage('Action after Executed' , 'After Execute '+agreementSO);
    }
    global void afterCreateFromOpportunity(APTS_Agreement__c agreementSO){
        logMessage('Action after Create agreement from Opp' , 'After Create');
    }
    global void afterCreateOffline(APTS_Agreement__c agreementSO){
            logMessage('Action after Create offline' , 'After Create');
    }
    global void afterExpire(APTS_Agreement__c agreementSO){
            logMessage('Action after Expire' , 'After Expire');
    }
    global void afterRenew(APTS_Agreement__c originalSO, APTS_Agreement__c renewalSO)
{

            logMessage('Action after Renew' , 'After Renew');

    }
    global void afterTerminate(APTS_Agreement__c agreementSO){
            logMessage('Action after Terminate' , 'After Terminate');
    }

    private void logMessage(String message , String action){
        System.debug('[LifecycleCallback ('+action+')] :'+message);
    }
}
```

Scenarios

This section covers the following scenarios:

- Making an Agreement Effective

Making an Agreement Effective

After an agreement is finalized and signed between the engaged parties, you can activate the agreement to bring it into effect.

To make an agreement effective

1. Generate an agreement document using Generating a Document.
2. Send the generated document for parallel review using Initiating Parallel Review.
3. After all the reviewers have reviewed the document, end the review using Ending Parallel Review.
4. Send the reviewed document for signatures using Sending a Document for Signatures.
5. After the document is signed, activate the document to make it effective using Activating Agreements.

Troubleshooting

Refer to this topic for descriptions of API error messages thrown by Salesforce and suggested actions to take. An exception is an error caused during code execution. There are a number of built-in Apex exceptions as well as custom exceptions provided by Conga.

The following exceptions thrown by Salesforce that can be handled by Conga and converted to custom error messages:

- System.Exception: Exception thrown under most circumstances.
- System.CalloutException: Exception thrown when communicating with external systems.
- DMLException: Exception thrown when performing CRUD ('Create', 'Read', 'Update', 'Delete') actions.

Refer to the following table for a list of custom error messages provided by Conga for some SOAP APIs, included suggested actions to take to resolve the exception.

API	Error Message	Suggested Action
Apttus_Proposal.MergeWebService.convertWordDocToPDF	Invalid attachment docId.	Ensure that you have provided the correct docId of the attachment.
Apttus_Proposal.MergeWebService.mergeDocsToPDF	Invalid Merge Webservice Endpoint.	Ensure that you have provided the correct endpoint in the Merge Webservice Endpoint comply system property.

API	Error Message	Suggested Action
Apttus.AgreementWebService.activateAgreement	No attachment(s) selected for activation.	Ensure that you have provided the correct docId of the attachment.
	You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
	No document or attachment found. This agreement must have a document or attachment to continue	Ensure that you have provided the correct docId of the attachment.
	Invalid attachment {0}	Ensure that you have provided the correct docId of the attachment.
Apttus.AgreementWebService.publishToExternalRepository	External repository is not enabled.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
Apttus.AgreementWebService.publishToChatterRepository	Chatter repository is not enabled.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
Apttus.AgreementWebService.publishToDocumentRepository	Document repository is not enabled.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.

API	Error Message	Suggested Action
Apttus.AgreementWebService.selectFirstTemplateIdForAgreement	You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. ({0})	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
Apttus.MergeWebService.convertWordDoc	Invalid attachment {0}	Ensure that you have provided the correct docId of the attachment.
Apttus.MergeWebService.convertWordDocToPDF	Invalid attachment {0}	Ensure that you have provided the correct docId of the attachment.
Apttus.MergeWebService.convertWordDocToPDF2	Invalid attachment {0}	Ensure that you have provided the correct docId of the attachment.
Apttus.MergeWebService.generateCustomDoc	Insufficient Privileges.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
Apttus.MergeWebService.submitGenerateCustomDoc	Insufficient Privileges.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.
Apttus.AuthorWebService.getWordDocumentInfosForParentWithFiles	You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary.	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.

API	Error Message	Suggested Action
Apttus.AgreementWebService.sendForSignature	Maximum of 150 Recipients can be added.	Ensure that you do not add more than 150 email addresses of recipients.
	Duplicate email address identified.	Review the email addresses you have entered and remove any duplicate email addresses.
	Please specify at least one recipient.	Ensure that you have provided at least one valid email address of a recipient.
	Invalid email address found. Kindly verify and provide valid email address separated by ;	Ensure that you have provided valid email addresses of the recipients separated by a semicolon.
	Missing Template ID: The send for signature email can't be triggered as the email template Id is missing.	Ensure that you have provided an email template Id.
	Missing Agreement ID: The send for signature email can't be triggered as the agreement Id is missing.	Ensure that you have provided an agreement Id.
	Missing Attachments: The send for signature email can't be triggered as there are no documents attached.	Ensure that at least one reviewed document is available in the agreement.
Apttus.AuthorWebService.subscribeToDocumentLock	You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. ({0})	Authentication or access (system permissions) issue. Contact an administrator or check the appropriate topic for authentication instructions.

API	Error Message	Suggested Action
Apttus.MergeWebService. mergeDocuments	Merge operation is only applicable for doc, docx and pdf file types.	Ensure that the documents you are trying to merge are in DOC, DOCX, or PDF format.
	Selected documents cannot be merged as the combined file size of the documents exceeds 25 MB.	Ensure that the file size of the documents you are trying to merge is less than 25 MB.

The following are standard Salesforce exceptions that cannot be handled or changed:

- LimitException
- UnexpectedException
- AssertException
- NoAccessException
- NoDataFoundException
- SerializationException
- VisualforceException

You can learn more about these exceptions and recommended actions to take by consulting Salesforce documentation. For additional guidance, please refer to the article.

CLM for REST API Developers

This section describes the REST APIs provided by Conga CLM.

Topic	Description
What's Covered	This section walks an API user through the list of REST APIs provided by Conga.
Primary Audience	API developers.
IT Environment	Refer to the latest Conga CLMRelease Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CLM Documentation topic.

Before using Conga CLM, you must be familiar with the following:

- Basic knowledge of Salesforce
- Basic knowledge of REST APIs
- Salesforce and Apttus terms and definitions

This section describes the following topics:

- Authenticating Agreement Services APIs
- Agreement REST API Services Version 1

Authenticating Agreement Services APIs

Basics

The Agreement Services API follows a microservice architecture that enables CLM into any part of an application and is built on the JSON API specification, follows predictable REST URLs and supports cross-origin resource sharing.

Endpoint

The Agreement Services API is installed with the CLM managed package and can be exposed to external applications via a Salesforce site or community.

```
https://myorg.force.com/services/apexrest/Apttus/clm/:version/:API
```

Versions

The Agreement Services API ensures backward compatibility by properly versioning any changes to the APIs. Should changes to the API structure need to be made, it will occur within a new version and older functionality will be preserved.

Content Type

Requests made to the API must be encoded as **JSON** and contain the header

```
Content-Type: application/json
```

Includes

You can easily include resource relationships on most top-level resources. Multiple includes are defined using comma-delimited values.

Caching

Server side caching is used and can be configured per request using the cacheStrategy query parameter.

Errors

Any request that returns an error follows a standard format. The Agreement Services API will return an array of errors that contains objects containing the status, title, and data with the error details.

Code	Response
201	Created Successfully
200	Updated Successfully
204	Deleted Successfully

Code	Response
400	Invalid JSON
422	Validation Error
500	Something went wrong on our end

Agreement REST API Services Version 1

(Open API documentation is only available to view online)

CLM Features by Release

Review the latest CLM Features by Release document.

- Features by Release

Features by Release

This document contains an overview of features introduced in each major release of CLM. For more information, see CLM Features by Release.

Conga Customer Community & Learning Center Resources

Transform your business and drive success with your one-stop shop, resource-rich Conga Customer Community.

After registering as a new member, you can explore a variety of resources, including exclusive access to our product user groups, where you can ask questions, collaborate with peers, and learn best practices.

From a personalized onboarding checklist to free expert-led webinars and our thought-leadership blog, the community is not only a gateway to your success, but a way to manage your Conga account, access the install center, and submit support tickets.

Don't forget to check out the Conga Learning Center to review your limited catalog of getting started courses. Want more? Consider upgrading to the Conga Learning Pass to unlock our premium training subscription.

Ready to get started?

Log into the Conga Customer Community with your credentials. Not yet registered? No problem. Set up an account to receive your credentials via our registration page.

After you log in, explore everything the community has to offer by clicking the "Get started" tab in the top navigation menu.

If you're ready to jump right into training, there are two ways to access the Conga Learning Center:

- On the home page, click the "Learning center" tile
- In the top navigation, click the "Learn" tab and then click "Learning center" on the dropdown menu