



Conga CLM



Table of Contents

- CLM Release Notes 13
 - February23.12.01 Release Notes 13
 - Packages..... 13
 - System Requirements and Supported Platforms 15
 - New Features..... 15
 - Enhancements..... 15
 - Data Model Changes..... 15
 - Fixed Issues 15
 - Known Issues 16
- February23.10.20 Release Notes 17
 - Packages..... 17
 - System Requirements and Supported Platforms 19
 - New Features..... 19
 - Enhancements..... 19
 - Data Model Changes..... 19
 - Fixed Issues 19
 - Known Issues 20
- February23.09.22 Release Notes 21
 - Packages..... 21
 - System Requirements and Supported Platforms 23
 - New Features..... 23
 - Enhancements..... 23
 - Data Model Changes..... 23
 - Fixed Issues 23
 - Known Issues 24
- February23.08.25 Release Notes 25
 - Packages..... 25
 - System Requirements and Supported Platforms 27
 - New Features..... 27
 - Enhancements..... 27

| | |
|---|----|
| Data Model Changes..... | 27 |
| Fixed Issues..... | 27 |
| Known Issues | 28 |
| February23.07.14 Release Notes | 29 |
| Packages..... | 29 |
| System Requirements and Supported Platforms | 31 |
| New Features..... | 31 |
| Enhancements..... | 31 |
| Data Model Changes..... | 31 |
| Fixed Issues..... | 32 |
| Known Issues | 32 |
| February23.05.19 Release Notes..... | 34 |
| Packages..... | 34 |
| System Requirements and Supported Platforms | 36 |
| New Features..... | 36 |
| Enhancements..... | 36 |
| Data Model Changes..... | 36 |
| Fixed Issues..... | 36 |
| Known Issues | 36 |
| February23.04.21 Release Notes..... | 38 |
| Packages..... | 38 |
| System Requirements and Supported Platforms | 40 |
| New Features..... | 40 |
| Enhancements..... | 40 |
| Data Model Changes..... | 40 |
| Fixed Issues..... | 40 |
| Known Issues | 41 |
| February23.03.24 Release Notes | 42 |
| Packages..... | 43 |
| System Requirements and Supported Platforms | 44 |
| New Features..... | 44 |
| Enhancements..... | 44 |
| Data Model Changes..... | 45 |
| Fixed Issues..... | 45 |

| | |
|---|-----|
| Known Issues | 45 |
| February23.03.10 Release Notes | 47 |
| Packages..... | 47 |
| System Requirements and Supported Platforms | 48 |
| New Features..... | 48 |
| Enhancements..... | 49 |
| Data Model Changes..... | 49 |
| Fixed Issues..... | 49 |
| Known Issues | 49 |
| February23.02.15 Release Notes | 51 |
| Packages..... | 51 |
| System Requirements and Supported Platforms | 53 |
| New Features..... | 53 |
| Enhancements..... | 53 |
| Data Model Changes..... | 54 |
| Fixed Issues..... | 54 |
| Known Issues | 55 |
| February '23 Release Notes | 56 |
| About CLM | 64 |
| Key Terminology..... | 67 |
| What's New in CLM Documentation | 74 |
| CLM for Administrators..... | 105 |
| Setting Up Conga CLM..... | 106 |
| Pre-installation Settings..... | 106 |
| Installing Conga CLM..... | 107 |
| Registering for Conga Upgrade Program..... | 108 |
| Post-installation Settings..... | 110 |
| Upgrading Conga CLM | 112 |
| Logging in to Contract Management..... | 115 |
| Configuring the CLM User Interface | 115 |
| Creating a Page Layout | 116 |
| Creating a Record Type | 116 |
| Configuring a Custom Link for Opportunity..... | 117 |

| | |
|--|-----|
| Configuring Custom Links on the Home Page | 118 |
| Customizing Agreement Actions..... | 120 |
| Adding Agreement Hierarchy Button | 121 |
| Adding In-Effect View Button..... | 121 |
| Adding the Email Agreement(s) Document(s) Button in Classic..... | 122 |
| Configuring Agreement Hierarchy Page Header..... | 122 |
| Configuring the Availability of Custom Buttons..... | 123 |
| Adding Agreement Hierarchy Button for Accounts..... | 124 |
| Configuring Documents Tab in Lightning..... | 124 |
| Configuring Document Action Column in Classic..... | 126 |
| Hiding Contracts and Templates Tabs in X-Author Contracts for Cloud..... | 127 |
| Translatable Customizations..... | 128 |
| Translating X-Author Contracts User Interface..... | 128 |
| Removing the Path Field..... | 135 |
| Configuring In-Effect View Page Header | 136 |
| Configuring New Agreement Form Fields..... | 136 |
| Populating the File Size Field..... | 136 |
| Setting Up Quick Search on the Home Page..... | 137 |
| User Profile Management..... | 137 |
| Managing User Profile | 138 |
| Creating a User Profile..... | 140 |
| Adding a Single User | 141 |
| Assigning Conga CLM License to a User..... | 141 |
| Assigning Users to Queues..... | 141 |
| Providing Read Access | 142 |
| Profile Settings and Security..... | 143 |
| Setting Up Lite User License..... | 154 |
| Folder Security and Sharing Permissions..... | 156 |
| Assigning Custom Permissions to User Profiles..... | 158 |
| Application Management Settings | 163 |
| Enabling Record Type for Template Authoring..... | 163 |
| Populating Contract and Template Picklists..... | 164 |
| Creating Formula Fields for an Agreement Rule Criteria..... | 166 |
| Saving Agreement Data..... | 168 |

| | |
|---|-----|
| Overriding Base Clone Specifications..... | 169 |
| Creating Validation Rules | 177 |
| Adding and Defining Action Panel..... | 177 |
| Conga CLM Objects..... | 178 |
| Objects Supporting Document Generation | 182 |
| Temporary Email Template Cleanup | 187 |
| Schedule Jobs to Refresh Agreement Data | 188 |
| Scheduling Expiration Date for Email Downloadable Link | 189 |
| Adding Custom Locale..... | 190 |
| Configuration to Email Multiple Agreement Documents in Lightning..... | 192 |
| Configuring Email Templates in Lightning..... | 193 |
| Setting Up Organization-Wide Email Address | 194 |
| Generating Registration Setting..... | 195 |
| Configuring Notification Email for Review Cycle Cancellation | 198 |
| Managing Templates..... | 198 |
| About Agreement Phases | 201 |
| Configuring Agreement Clause Categories and Subcategories..... | 202 |
| Configuring Agreement Term Exception..... | 205 |
| Configuring Dynamic Document Assembly | 208 |
| Configuring Offline Agreement Window | 234 |
| Configuring Template DataSource Filter..... | 238 |
| Configuring Template Versioning | 240 |
| Document Generation for Templates with Nested Clauses | 256 |
| Publishing Templates..... | 256 |
| Query Template..... | 261 |
| Securing Documents..... | 264 |
| Setting Up Template Filtering Rules..... | 265 |
| Setting Up Template Object for Contract Management | 266 |
| Document Generation Capabilities | 267 |
| Agreement Document Output Formats..... | 288 |
| Managing Alternate Clauses..... | 291 |
| Agreement Lifecycle Management..... | 291 |
| About Agreement Lifecycle Management Process..... | 293 |
| Requesting and Drafting an Agreement..... | 295 |

| | |
|--|-----|
| Generating An Agreement - User Permissions..... | 305 |
| Configuring Columns in the Template Selection Page in Lightning..... | 305 |
| Negotiating An Agreement..... | 306 |
| Controlling Access Permissions for Agreements..... | 322 |
| Routing Documents to Content Libraries | 324 |
| Managing Offline Agreements | 347 |
| Configuring Obligation Management..... | 361 |
| Searching and Reporting | 362 |
| Editing Classic Email Templates..... | 372 |
| Configuring Old Activation UI..... | 373 |
| Connecting to External APIs..... | 373 |
| Managing Send for Review | 376 |
| Configuring Activation Settings..... | 392 |
| Versioning Contract Documents..... | 396 |
| Understanding Document Versions | 397 |
| Document Version Properties..... | 398 |
| Enabling Contract Document Versioning..... | 401 |
| Configuring Document Finder | 409 |
| Managing Workflow | 411 |
| Creating New Workflow Rules..... | 411 |
| Automating the Process Through Workflow Rules..... | 411 |
| Creating a Workflow Task..... | 412 |
| Creating Email Alerts | 413 |
| Defining Field Updates..... | 414 |
| Validating Workflows..... | 414 |
| Migrating Attachments to Files..... | 415 |
| Prerequisites..... | 415 |
| Key Points To Remember | 415 |
| Converting Attachments to Files..... | 416 |
| Deleting Attachments | 420 |
| Migrating from Notes and Attachments to Files in Lightning | 422 |
| Configuring Agreement Document Protection | 422 |
| Enabling Document Protection..... | 423 |
| Defining Protection Password..... | 423 |

| | |
|--|-----|
| Setting Up Agreement Protection..... | 424 |
| Use Case for Setting Up Agreement Document Protection..... | 425 |
| PDF Security for Agreement Documents..... | 426 |
| Retention Policies..... | 428 |
| Creating Retention Policies..... | 429 |
| Calculating Retention Date..... | 431 |
| Recording Retention Authorized Users..... | 432 |
| Sending Purge Notification..... | 433 |
| About Purge Agreements..... | 437 |
| Retention Policy Schema..... | 437 |
| Contract Wizard..... | 441 |
| Getting Started with the Wizard Designer..... | 444 |
| Creating a New Wizard Design..... | 445 |
| Using the Wizard Component Library..... | 477 |
| Running Wizards..... | 483 |
| Example: Configuring a Sales Contract Wizard..... | 489 |
| Configuring Wizards as Self-Service with Salesforce Sites and Communities..... | 505 |
| Integrating the Contract Wizard with Other Applications..... | 520 |
| Configuring Meta Property Field Sets for Set Custom Value Rules..... | 522 |
| Auto-Populating Wizard Fields at Runtime..... | 523 |
| Use Case for Contract Wizard..... | 528 |
| Providing Access to Run Wizards..... | 530 |
| Configuring Wizard as a Related Tab..... | 531 |
| Contract Lifecycle Management with Salesforce Lightning..... | 532 |
| Enabling the Lightning Experience in Salesforce..... | 533 |
| Managing Comply System Properties..... | 535 |
| Enabling and Customizing the Action Panel..... | 535 |
| Adding Wizard Launcher Tab in Lightning..... | 540 |
| Appendices..... | 540 |
| Agreement Fields..... | 541 |
| Agreement Actions..... | 554 |
| Agreement Status Categories and Statuses..... | 561 |
| Admin Entries..... | 566 |
| Comply System Properties..... | 591 |

| | |
|---|-----|
| Comply Custom Properties | 602 |
| Custom Permissions..... | 603 |
| CLM Glossary | 605 |
| Frequently Asked Questions..... | 609 |
| Conga CLM Limitations..... | 610 |
| Comply User Properties | 610 |
| CLM for Users..... | 611 |
| Setting Up CLM..... | 612 |
| Logging in to CLM..... | 612 |
| Managing User Profiles..... | 613 |
| Managing Agreement Lifecycle | 615 |
| Creating an Agreement..... | 615 |
| Use Case for Creating an Agreement..... | 629 |
| Generating an Agreement | 630 |
| Sending an Agreement Document for Review | 632 |
| Sending an Agreement Document for Parallel Review..... | 637 |
| Sending an Agreement Document for Microsoft Teams Review..... | 646 |
| Sending an Agreement Document for Collaborative Review Using Office 365 Review..... | 650 |
| Negotiating an Agreement Document | 656 |
| Finalizing an Agreement..... | 658 |
| Activating an Agreement | 661 |
| Managing Agreement Lifecycle Post-Activation | 664 |
| Working with Offline Agreements..... | 665 |
| Working with Agreements..... | 679 |
| Searching Agreement Documents | 679 |
| Viewing Agreement Hierarchy..... | 682 |
| Emailing Multiple Agreement Documents | 684 |
| Accessing In-Effect View | 686 |
| Viewing Account's Agreement Hierarchy..... | 689 |
| Clause Versioning..... | 690 |
| Uploading Signed Documents | 691 |
| Merging Documents in Salesforce Lightning | 693 |
| Importing Supporting Documents | 696 |

| | |
|--|-----|
| Using Smart Search to Search Content in Agreement Documents in Lightning | 696 |
| Working with Documents..... | 705 |
| Contract Document Versioning..... | 706 |
| Restriction..... | 707 |
| About Document Versions Concepts | 707 |
| New Document versus Incremented Version..... | 709 |
| Viewing Document Versions on an Agreement Record..... | 710 |
| Viewing Document Version Details..... | 710 |
| Checking in the Final Version..... | 711 |
| Document Versions and Template Versioning..... | 712 |
| Searching and Viewing Version-Aware Documents..... | 712 |
| Contract Wizard in Classic..... | 715 |
| Using the Wizards Tab..... | 716 |
| Running a Wizard..... | 717 |
| Tracking Wizard Activity | 724 |
| Accessing the Preview Sidebar..... | 725 |
| Use Case for Running Contract Wizard | 727 |
| Reports and Dashboards | 730 |
| About Agreement Explorer Reports..... | 730 |
| Conga CLM on Salesforce Lightning | 766 |
| Enabling the Lightning Experience in Salesforce | 766 |
| Accessing Features in Lightning..... | 766 |
| Creating an Agreement in Lightning | 766 |
| Contract Wizard in Lightning..... | 768 |
| Frequently Asked Questions in CLM..... | 777 |
| Appendix..... | 777 |
| Actions..... | 777 |
| Supported File Sizes in Lightning..... | 784 |
| Supported File Sizes in Classic..... | 787 |
| Supported File Formats | 788 |
| CLM for SOAP API Developers..... | 790 |
| Getting Started with CLM APIs..... | 790 |
| API Supported Packages | 791 |

| | |
|---|-----|
| Document Setup..... | 791 |
| API Standards and Development Platforms..... | 791 |
| Field Types..... | 792 |
| Integrating Conga CLM with External Systems..... | 793 |
| API Reference..... | 796 |
| Agreement Web Service..... | 797 |
| Merge Web Service..... | 816 |
| Author Web Service..... | 906 |
| Callback Classes..... | 916 |
| Scenarios..... | 919 |
| Making an Agreement Effective..... | 919 |
| Troubleshooting..... | 920 |
| CLM for REST API Developers..... | 925 |
| Authenticating Agreement Services APIs..... | 925 |
| Basics..... | 925 |
| Endpoint..... | 925 |
| Versions..... | 926 |
| Content Type..... | 926 |
| Includes..... | 926 |
| Caching..... | 926 |
| Errors..... | 926 |
| Agreement REST API Services Version 1..... | 927 |
| CLM Features by Release..... | 928 |
| Features by Release..... | 928 |
| Conga Customer Community & Learning Center Resources..... | 929 |
| Ready to get started?..... | 929 |

CLM

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.

- [February23.12.01 Release Notes](#)
- [February23.10.20 Release Notes](#)
- [February23.09.22 Release Notes](#)
- [February23.08.25 Release Notes](#)
- [February23.07.14 Release Notes](#)
- [February23.05.19 Release Notes](#)
- [February23.04.21 Release Notes](#)
- [February23.03.24 Release Notes](#)
- [February23.03.10 Release Notes](#)
- [February23.02.15 Release Notes](#)
- [February '23 Release Notes](#)


February23.12.01 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.12.01 release. For documentation updates, see [What's New in CLM Documentation](#).

 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

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 | 4.0.243.2 | 4.243.2 |
| Conga Contract Lifecycle Management (New) | 14.0.696.20 | 14.696.20 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.7 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.50.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73.1 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 1.2.6 | 1.6 |

i 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

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

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 |
|-------------|-------------------|--|
| N/A | CONTRACTS-15728 | The following error displays when searching for a specific user during Microsoft Office 365 review: <code>Cannot read properties of undefined (reading 'toLowerCase')</code> |

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. |
| 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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |


February23.10.20 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.10.20 release. For documentation updates, see [What's New in CLM Documentation](#).


 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

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 | 4.0.243.2 | 4.243.2 |
| Conga Contract Lifecycle Management (New) | 14.0.696.19 | 14.696.19 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.7 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.50.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73.1 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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.

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. |
| 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. |
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| Conga Internal ID | Description |
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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. |
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| 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. |


February23.09.22 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.09.22 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 (New) | 4.0.243.2 | 4.243.2 |
| Conga Contract Lifecycle Management (New) | 14.0.696.18 | 14.696.18 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.7 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.50.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73.1 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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 |
|-------------|-------------------|---|
| 00858559 | CONTRACTS-13265 | Unable to add a user in the To field when sending a document for Office 365 mixed review. |

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|--|
| 00858845 | CONTRACTS-12954 | Generating or regenerating agreement documents shows duplicate details in the Document Version Detail section. |

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. |

February23.08.25 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.08.25 release. For documentation updates, see [What's New in CLM Documentation](#).

 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.


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.

i 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 | 4.0.243.1 | 4.243.1 |
| Conga Contract Lifecycle Management (New) | 14.0.696.16 | 14.696.16 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.7 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.50.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73.1 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
|--|-------------------------------|---------------------------------|
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|---|
| 00857167 | CONTRACTS-12352 | When you try to create an agreement using a wizard, duplicate agreements are created. |

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. |

February23.07.14 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.07.14 release. For documentation updates, see [What's New in CLM Documentation](#).

i This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.


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.

i 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 | 4.0.243.1 | 4.243.1 |
| Conga Contract Lifecycle Management (New) | 14.0.696.15 | 14.696.15 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.7 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.50.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration (New) <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73.1 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
|--|-------------------------------|---------------------------------|
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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 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 | CONTRACTS-1025 | When there is a conditional date field in a wizard, the condition changes based on the time zone. |
| NA | CONTRACTS-10960 | 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. |
| 00846899 | CONTRACTS-10849 | 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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |
| 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. |

| Conga Internal ID | Description |
|-------------------|--|
| CLM-2690 | In the Salesforce One app, clicking the lookup option does not open a new pop-up window. |


February23.05.19 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.05.19 release. For documentation updates, see [What's New in CLM Documentation](#).

 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.


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 | 4.0.243.1 | 4.243.1 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
|---|-------------------------------|---------------------------------|
| Conga Contract Lifecycle Management (New) | 14.0.696.13 | 14.696.13 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.5 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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 CLM in this release.

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](#).

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 | <p>You encounter an error when you click in the TO field while sending a document for review using the Safari browser.</p> <p>Workaround: Use Chrome or Microsoft Edge to send documents for review.</p> |
| 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. |

| 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. |

February23.04.21 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.04.21 release. For documentation updates, see [What's New in CLM Documentation](#).


 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

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.

i 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 | 4.0.243.1 | 4.243.1 |
| Conga Contract Lifecycle Management (New) | 14.0.696.12 | 14.696.12 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.5 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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 |
|-------------|-------------------|--|
| 00832530 | CLM-8334 | While creating input control in a wizard an error is displayed on navigating back to the Wizard list page. |

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|---|
| 00835806 | CLM-8333 | When the 'Retain header and footer' checkbox is selected based on the 'APTS_DefaultHeaderFooterOptionForMerge' admin entry and two documents are merged, the header and footer are not retained in the merged document. |
| 00830667 | CLM-8325 | On creating an agreement using the Clone or Amend options and deleting the newly created agreement, a null pointer error is displayed. |

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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |

February23.03.24 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.03.24 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.

i 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 (New) | 4.0.243.1 | 4.243.1 |
| Conga Contract Lifecycle Management (New) | 14.0.696.10 | 14.696.10 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.5 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
|---|-------------------------------|---------------------------------|
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|--|
| 00831315 | CLM-8320 | When a user clicks View on the Agreement Related list to view a document in an activated agreement, the user encounters an error. |

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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |
| 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. |

February23.03.10 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.03.10 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.

i 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 | 4.0.243 | 4.243 |
| Conga Contract Lifecycle Management (New) | 14.0.696.8 | 14.696.8 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API (Required if you are using DocuSign) | 8.1.142 | 8.142.5 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
|---|-------------------------------|---------------------------------|
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|---|
| 00808561 | CLM-8299 | <p>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.</p> <p>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.</p> |

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 | <p>You encounter an error when you click in the TO field while sending a document for review using the Safari browser.</p> <p>Workaround: Use Chrome or Microsoft Edge to send documents for review.</p> |
| 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. |


February23.02.15 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February23.02.15 release. For documentation updates, see [What's New in CLM Documentation](#).

 This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your Customer Success Manager (CSM) or Account Executive (AE) to discuss your specific features and licensing.

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 | 4.0.243 | 4.243 |
| Conga Contract Lifecycle Management (New) | 14.0.696.7 | 14.696.7 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.5 |
| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 1.2.6 | 1.6 |

i 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 enhancements are new to Conga CLM Wizard in this release.

Document Type for Imported Document

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. 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](#).

Agreement Name and Type are Removed

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 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](#).

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 |
|-------------|-------------------|---|
| 00827183 | CLM-8286 | If you have configured a custom email template for sending for review in Salesforce Lightning, you can see extra spaces or the text is overridden by header images. |

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|--|
| 00823792 | CLM-8272 | When you add capital letters in the email address while sending for review, the review email is not sent to the reviewers and the review cycle for each reviewer is stuck in the Not Started status. |
| 00823600 | CLM-8266 | On the Review Cycle page, the document name is not truncated. Resolution info: The document name on the review cycle page is truncated. |

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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |

February '23 Release Notes

Conga CLM for Salesforce February '23 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the CLM February '23 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.

i 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 (New) | 4.0.243 | 4.243 |
| Conga Contract Lifecycle Management (New) | 14.0.696 | 14.696 |
| Conga Content Integration | 8.1.0020 | 8.20 |
| Conga DocuSign API <i>(Required if you are using DocuSign)</i> | 8.1.142 | 8.142.5 |

| Package | Latest Certified Version Name | Latest Certified Version Number |
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| Conga CLM DocuSign Integration <i>(Required if you are using DocuSign)</i> | 5.1.50 | 5.5 |
| Adobe Sign <i>(Required if you are using Adobe Sign)</i> | 24.2 | 24.2 |
| Conga CLM Adobe Sign Integration <i>(Required if you are using Adobe Sign)</i> | 10.1.73 | 10.73 |
| CongaSign CLM Integration <i>(Required if you are using Conga Sign)</i> | 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

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

Send Documents for Mixed Review using Office 365

You can send agreement documents for review to stakeholders in and out of your organization. You can also initiate 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). For more information, see [Sending an Agreement Document for Collaborative Review Using Office 365 Review](#).

Use SharePoint Site for Office 365 Review

An administrator can create a Microsoft SharePoint site to apply security and give access to only selected stakeholders when users send Office 365 documents for internal, external, or mixed review. In the Office 365 Settings, you can use the SharePoint Site field to add Microsoft SharePoint Site. For more information, see [Configuring Office 365 Settings](#).

Enhancements

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

Impact of Salesforce Org's Hostnames Changes on CLM

To support the enhanced domains within Salesforce, Salesforce has changed the base domain URL of the sandboxes. Hence, you need to update the Instance URL comply system property with the new URL. For example, the existing URL: <https://testmanaged--tbox.my.salesforce.com> and the new URL: <https://testmanaged--tbox.sandbox.my.salesforce.com>. You must also ensure that Use enhanced domains and Redirect previous My Domain URLs to your current My Domain checkboxes are unselected in the My Domain Settings. For more information, see [Comply System Properties](#).

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_ActivateDocumentSelectable | APTS_ActivateDocumentSelectAll | APTS_ActivateDocumentPublishAll | 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 |

Import Offline Conga Generated Documents without Metadata

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. For more information, see [Importing an Offline Document](#).

Increase in Character Limit

The RuntimeHelpText__c field in the WizardInputControl2__c object is introduced to increase the character limit from 255 to 510 characters for the help text on the input field in a wizard.

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 | | | | |

| Object | Field | Description | System/ User | New/ Changed |
|-----------------------------|--------------------|--|--------------|--------------|
| | Office365Review__c | A formula field for Office 365 review | User | New |
| Office365Settings__c.object | | | | |
| | SharePointSite__c | A field for configuring a site for office 365 review | User | New |
| WizardInputControl2__c | | | | |
| | RuntimeHelpText__c | A field to store help text of a wizard field | User | New |

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 |
|-------------|-------------------|--|
| NA | CONTRACTS-3267 | <p>The review cycle does not complete when a user reviews the document in a word processor other than MS Word.</p> <p>Resolution info: When a contract administrator tries to end the review by uploading a document that was reviewed in a word processor other than MS Word, the contract administrator will receive an email notification to upload the correct document and the review cycle stays in progress.</p> |

| Case Number | Conga Internal ID | Description |
|-------------|-------------------|--|
| 00815753 | CONTRACTS-3316 | Special characters (< , > , \ , /) are restricted to use in the agreement name. Resolution info: You can use special characters (< , > , \ , /) in the agreement name. |
| 00864289 | CONTRACTS-3010 | An activity history entry is not added after sending an agreement document for Office 365 review. |

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. |

| Conga Internal ID | Description |
|-------------------|--|
| 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. |
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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. |
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| 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:





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 |
|---|---|
| <ul style="list-style-type: none"> • Manage user profiles <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • Work with agreements <ul style="list-style-type: none"> • Create • Generate • Send for review • Negotiate • Finalize • Sign/Execute • Activate • Manage agreement lifecycle post-activation <ul style="list-style-type: none"> • Amend • Renew • Terminate • Expire • Work with offline agreements <ul style="list-style-type: none"> • 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 <div data-bbox="815 1391 1426 1559" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> For end-user functionality, see CLM for Users, CLM for SOAP API Developers, and CLM for REST API Developers.</p> </div> |

| Administrator | Administrator/User |
|--|--------------------|
| <ul style="list-style-type: none"> • Configure agreement rules to route content • Configure intelligent import • Configure agreement versioning • Implement agreement protection • Configure contract wizard • Manage workflow <ul style="list-style-type: none"> • Create, edit, delete, and validate workflow rules • Configure workflow and approval email alerts • Configure retention policies • Configure reports <ul style="list-style-type: none"> • Manage cycle time reports • Configure Agreement Explorer <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> For administrator functionality, see CLM for Administrators.</p> </div> | |

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 | <p>A feature that helps protect your documents when they are generated in Microsoft Word format.</p> <p>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.</p> |
| 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 | <p>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.</p> <p>Only users with UnlockCheckedInDocument action permission can unlock the locked agreement.</p> |
| Agreement Protection | A tab in the Conga Contract Management application that specifies protection settings (available on the Agreement Wizard) for agreements. |
| Agreement Rule | <p>A condition that allows you to configure how an agreement request is processed when the user clicks Submit Request.</p> <p>Based on the administrator-defined criteria for a specific agreement record type, agreement rules can dictate if:</p> <ul style="list-style-type: none"> • 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 | <p>An action that enables you to modify the terms of an active agreement.</p> <p>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.</p> |
| Apttus Retention Policy Schema | <p>An XML schema that describes the retention policy specification.</p> <p>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.</p> <p>You can edit the specification of a retention policy to define the date until which the agreement is retained.</p> |
| 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 | <p>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").</p> <p>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.</p> |
| 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 | <p>A user interface that organizes and presents key statistics in an easy to understand format</p> <p>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.</p> |
| 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 | <p>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.</p> <div data-bbox="635 927 1426 1111" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>You need to have an Intelligent Import license to process third-party paper in Conga CLM.</p> </div> |
| 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 | <p>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:</p> <ul style="list-style-type: none"> • Fields, related lists, and custom links • Field properties (visible, read-only, and required) • Page section customizations |
| Query template | <p>This feature allows you to narrow down the list of templates available for document generation.</p> |
| Record | <p>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.</p> |
| Record Type | <p>An element that allows you to offer different business processes, picklist values, and page layouts to different users.</p> <p>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.</p> |
| Redlining | <p>Allows you to identify the changes made by reviewers and accept or reject changes according to your business requirement.</p> |
| Renew | <p>An action that enables users to create a new version of the agreement.</p> |
| Reports | <p>Salesforce delivers standard report folders that contain reports for each record type. For example, Accounts, Opportunities, Leads, and so on.</p> |
| Retention Policy | <p>A rule that determines the length of time a record must be stored.</p> |
| Template | <p>A blueprint to generate a variety of document types when merged with data from agreements or quotes.</p> |

| 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.

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. |
| |  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. |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|---|
| | | Admin Entries | Modified topic. Added the following admin entries. <ul style="list-style-type: none"> • 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_DefaultHeaderFooterOptionForMerge admin entry. |

| Document | Publication Date | Topic | Description |
|----------|------------------|--|--|
| | | 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. |
| | 📅 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. |
| | 📅 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. | |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|---|
| | | 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. |
| | | 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. |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|---|
| | | 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. |

| Document | Publication Date | Topic | Description |
|--|---|--|---|
| | 📅 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. |
| | | 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. | | |

| Document | Publication Date | Topic | Description |
|----------|------------------|---|--|
| | | Sending an Agreement Document for Parallel Review | Modified topic. Added details about the following enhancements: <ul style="list-style-type: none"> • 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. |
| | | 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: <ul style="list-style-type: none"> • 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. |

| Document | Topic | Description |
|---------------------|---|--|
| | 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 <i>APTS_SkipFileSplitWhileSavingFile</i> 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. |
| | 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • APTS_ExcludedNamespaces |

| Document | Topic | Description |
|----------|---|--|
| | Configuring Wizards as Self-Service with Salesforce Sites and Communities | <p>Updated section. Removed content related to guest users.</p> <p><i>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.</i></p> |
| | Configuring the Availability of Custom Buttons | <p>Modified topic. Added details about configuring custom buttons.</p> |
| | Enabling and Customizing the Action Panel | <p>Modified topic. Added details about configuring custom buttons.</p> |
| | Editing Classic Email Templates | <p>New topic. A new feature for this release.</p> |
| | Configuring New Activation UI | <p>New topic. A new feature for this release.</p> |
| | Configuring In-Effect View Page Header | <p>New topic. A new feature for this release.</p> |
| | Configuring MS Teams Setting | <p>Modified topic. Added details about MS Teams job.</p> |
| | Configuring Smart Search | <p>New topic. A new feature for this release.</p> |
| | Online Contract Collaboration | <p>Removed content related to Online Contract Collaboration. See the Online Contract Collaboration (OCC) Administrator Guide for information related to OCC.</p> |
| | Mapping Clauses and Fields to Provisions | <p>Removed page. Deprecated feature.</p> |

| Document | Topic | Description |
|----------|--|--|
| | 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. |
| | 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. <i>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.</i> |
| 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. |
| | Enabling and Customizing the Action Panel | Modified topic. Added the following custom buttons: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Added APTS_SkipContentSearchForActivation • APTS_SkipRemoveDraftDocumentOnActivation • APTS_RetainFileNameForParallelReviewMergedDocument Updated the following admin entries: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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_XAAAddInLoadType 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: <ul style="list-style-type: none"> • APTS_CustomLinksForActionPanel • APTS_TemplateSelectionGuidance |
| | Comply System Properties | Modified topic. Added the following comply system properties: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Document Type • Agreement status |
| | Creating an Offline Agreement | Modified topic. Added details about: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Document viewer • Agreement status |
| | Uploading Signed Documents | Modified topic. Added details about: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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 <i>subscribeToDocumentLock</i> API. |
| | Merging Documents | New topic. Added the details about the <i>mergeDocuments</i> API. |
| | Sending a Document for Signatures | New topic. Added the details about the <i>sendForSignature</i> API. |
| | Integrating Conga CLM with External Systems | A new topic for external integrations using the <i>Conga CLM</i> 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: <ul style="list-style-type: none"> • 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 XAJIS 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 | <p>Added the following comply system properties:</p> <ul style="list-style-type: none"> • 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 • XAJIS 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: <ul style="list-style-type: none"> • RetainInputHeaderFooter • CumulativePageNumber |

Winter '19

| Document | Topic | Description |
|-------------|--|---|
| Winter 2019 | Admin Objects | Modified topic. Added the following admin objects: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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](#)

- [Migrating Attachments to Files](#)
- [Configuring Agreement Document Protection](#)
- [Retention Policies](#)
- [Contract Wizard](#)
- [Contract Lifecycle Management with Salesforce Lightning](#)
- [Appendices](#)

Setting Up Conga CLM

Select one of the following topics for more information:

- [Pre-installation Settings](#)
- [Installing Conga CLM](#)
- [Registering for Conga Upgrade Program](#)
- [Post-installation Settings](#)
- [Upgrading Conga CLM](#)
- [Logging in to Contract Management](#)

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](https://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** to 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 February '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 February '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 February '23

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

Upgrading Conga CLM from September '22 to February '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 February '23. These packages are required to utilize the new features and enhancements of February '23.

| Order | Product | September '22 Upgrade Version (Name Number) | February '23 Upgrade Version (Name Number) |
|---|-------------------------------------|---|--|
| 1 | Conga Base Library | 3.1.238 3.238 | 4.0.243 4.243 |
| 2 | Conga Contract Lifecycle Management | 13.1.683 13.683 | 14.0.696 14.696 |
| 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 May '22 to February '23

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

| Order | Product | May '22 Upgrade Version (Name Number) | February '23 Upgrade Version (Name Number) |
|---|-------------------------------------|---|--|
| 1 | Conga Base Library | 3.0.232 3.232 | 4.0.243 4.243 |
| 2 | Conga Contract Lifecycle Management | 13.0.669 13.669 | 14.0.696 14.696 |
| 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 | 8.0.117 8.117 | 8.1.142 8.142.2 |
| 5 | Conga Contract DocuSign Integration | 4.2.48 4.48 | 5.1.50 5.5 |
| Upgrade the following packages if you use Adobe Sign: | | | |
| 4 | Adobe Sign | 23.14 23.14 | 24.2 24.2 |
| 5 | Conga Contract EchoSign Integration | 9.2.69 9.69 | 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 existing Visualforce page containing javascript code and configuring the action to invoke the javascript code in a new Visualforce page

before displaying the agreement to the user for editing. Ajax javascript libraries supplied by Salesforce are available for use in the javascript code.

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(Apptus__Status_Category__c,"Request"),
(ISPICKVAL(Apptus__Status__c,"Request") ) ), IF (OR ($User.UIThemeDisplayed ==
'Theme4d', $User.UIThemeDisplayed == 'Theme4t', $User.UIThemeDisplayed ==
'Theme4u') , HYPERLINK("/apex/Apptus__LightningOfflineDocumentImport?
action=UploadSignedDocument&id=" &Id, IMAGE("/resource/
Apptus__Button_UploadSignedDocument", "Upload Signed Document"), "_self" ) ,
HYPERLINK("/apex/Apptus__OfflineDocumentImport?action=UploadSignedDocument&id="
&Id, IMAGE("/resource/Apptus__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

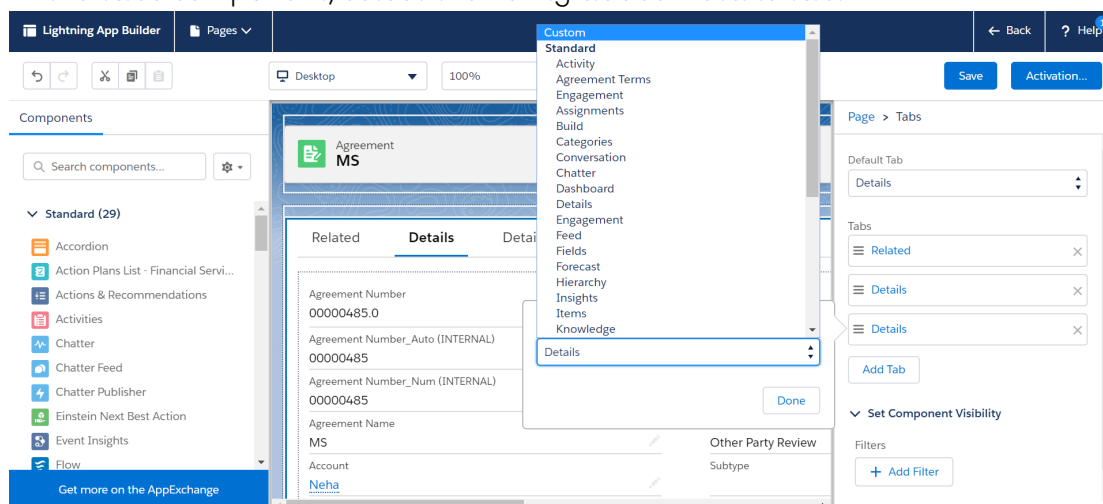
You must configure the registration setting to allow users to configure columns on the Documents tab. For more information, see [Generating Registration Setting](#).

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.

- i** 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.

Locale Settings

Time Zone: (GMT-07:00) Mexican Pacific Standard Time (America/Mazatlan)

Locale: Spanish (Mexico)

Language: Español

Currency: EUR - Euro

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.

Sistema de traducción
Nuevo idioma Ayuda para esta página

Seleccione el idioma que desee agregar. Agregue traductores para este idioma en el cuadro Lista seleccionada y haga clic en Guardar. Una vez que los traductores han agregado todos los valores traducidos, seleccione Activo para que estas traducciones estén disponibles para los usuarios.

Modificar idioma de traducción

Seleccionar idioma: Idioma: Español, Activo:

Identificar traductores para este idioma

Para hacer que los usuarios sean traductores de este idioma, selecciónelos en la Lista disponible y haga clic en Agregar. Asegúrese de otorgar el permiso de "Ver parámetros y configuración" a todos los traductores para que puedan empezar a traducir.

Buscar Usuarios: [] [Buscar]

Lista disponible: --Ninguno--

Lista seleccionada: A, B, C, D, G, H, J

[Agregar] [Eliminar]

[Guardar] [Cancelar]

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.

```

<!-- SPINNER -->
<apex:actionStatus id="spinnerLightning">
  <apex:facet name="start">
    <div class="slds-spinner_container" style="position: fixed;">
      <div role="status" class="slds-spinner slds-spinner--large slds-spinner--brand">
        <div class="slds-spinner__dot-a"></div>
        <div class="slds-spinner__dot-b"></div>
      </div>
    </apex:facet>
  </apex:actionStatus>
<!-- / SPINNER -->
<script type="text/javascript">
  $(document).ready(function() {
    addPlaceholder();
  });
  function onAjaxStart() {
    $.blockUI({ message: '<div>{!$Label.LoadingPage}</div>' });
  }
  function onAjaxStop() {
    $.unblockUI();
    $(".tagit-autocomplete").hide();
  }
  function ownerChange() {
    searchAgreements();
  }
  function addPlaceholder() {
    addHtmlPlaceholder('{!$Label.Agreement}' + ' ' + '{!$Label.apptus_owner}');
  }
</script>
<apex:form id="idBrowseSObject" style="min-width:1000px">
  <apex:outputPanel id="tempPanel">
    <apex:pageBlock title="{!IF(source == 'XAuthor', IF(IsCheckInMode, $Label.apptus__checkin, $Label.apptus__checkout), '')}">
      <apex:actionFunction name="searchAgreements">

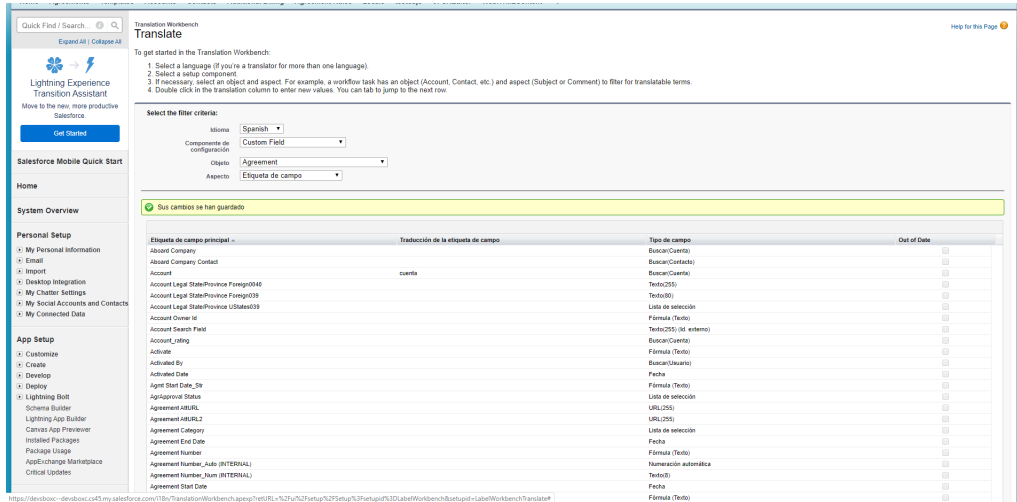
```

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.

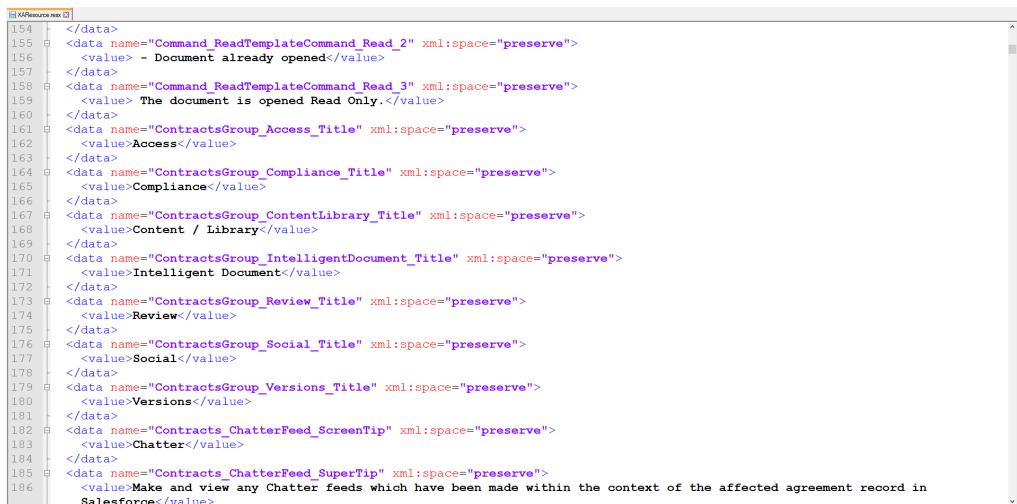
15. Click **Save**.
16. Go to **Setup > Translation Workbench > Translate**.
17. In the Select the filter criteria section, select the following options:
18. In the Field Label Translation column, double-click on the field space next to a field you need to translate available in the Master Field Label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



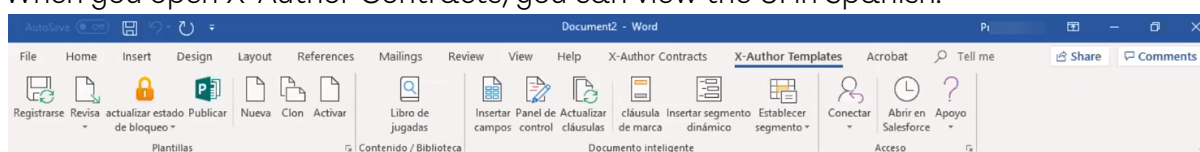
After translation:

```

154 </data>
155 <data name="Command_ReadTemplateCommand_Read_2" xml:space="preserve">
156 <value>- Documento ya abierto</value>
157 </data>
158 <data name="Command_ReadTemplateCommand_Read_3" xml:space="preserve">
159 <value>El documento está abierto Solo lectura.</value>
160 </data>
161 <data name="ContractsGroup_Access_Title" xml:space="preserve">
162 <value>Acceso</value>
163 </data>
164 <data name="ContractsGroup_Compliance_Title" xml:space="preserve">
165 <value>Conformidad</value>
166 </data>
167 <data name="ContractsGroup_ContentLibrary_Title" xml:space="preserve">
168 <value>Contenido / Biblioteca</value>
169 </data>
170 <data name="ContractsGroup_IntelligentDocument_Title" xml:space="preserve">
171 <value>Documento Inteligente</value>
172 </data>
173 <data name="ContractsGroup_Review_Title" xml:space="preserve">
174 <value>Revisión</value>
175 </data>
176 <data name="ContractsGroup_Social_Title" xml:space="preserve">
177 <value>Social</value>
178 </data>
179 <data name="ContractsGroup_Versions_Title" xml:space="preserve">
180 <value>Versiones</value>
181 </data>
182 <data name="Contracts_ChatterFeed_ScreenTip" xml:space="preserve">
183 <value>Chatter</value>
184 </data>
185 <data name="Contracts_ChatterFeed_SuperTip" xml:space="preserve">
186 <value>Cree y vea cualquier fuente de Chatter que se haya realizado dentro del contexto del registro del acuerdo afectado en Salesforce.</value>

```

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

- **Creating a User Profile**

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

- **Adding a Single User**

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

- **Adding Multiple Users**

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

- **Assigning 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

i 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**.

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

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

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](#).

i 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 | Administrator |
|--|----------------------|----------------------------|-------------------------------------|---|----------------------|
| 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 | Administrator |
|-------------------------------------|---------------------------|----------------------------|-------------------------------------|---|----------------------|
| 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 | Administr ator |
|--|------------------|--------------------------------|---|---|-------------------------------------|
| 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 | Administr ator |
|---------------------------|------------------|--------------------------------|---|---|-------------------------------------|
| 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 | Administr ator |
|--------------------------|------------------|--------------------------------|---|---|----------------------------|
| 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 | Administr ator |
|----------------------------|------------------|--------------------------------|---|---|----------------------------|
| 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 | 00D4T000000mfpUAC |
| 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) |
|----------|-------------------|-----------------|----------------------|---------------------|-------------------|
| SI | 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) |
|----------|-------------------|-----------------|----------------------|---------------------|-------------------|
| SI | 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

i 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:

i 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.

i 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_ProfilePermissions | 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

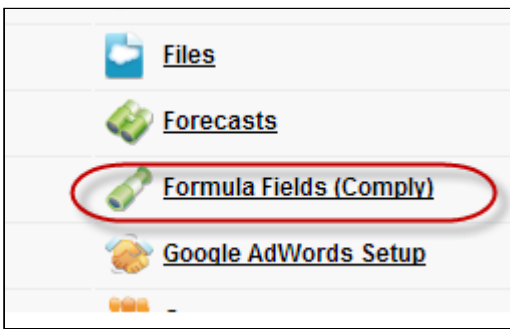
1. Go to **Setup > Create > Objects**.
2. Under the Label column, click **Template** to edit the custom Template object. The custom object definition is displayed.
3. Scroll down to the Custom Fields & Relationships related list.
4. Click the **Subcategory** Field Label.
5. Click **New** to create subcategory 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**.

 A screenshot of a web form titled 'Formula Field (Comply) Edit' and 'New Formula Field (Comply)'. The form has a header with 'Formula Field (Comply) Edit' and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the header is an 'Information' section with the following fields:

- 'Field Name' with an empty text input field.
- 'Type' with a dropdown menu showing 'Relationship'.
- 'Business Object' with a dropdown menu showing 'Agreement'.
- 'Formula' with an empty text input field.
- 'Description' with a text area and a small orange circle icon to its left.

 At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

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`.

Formula Field (Comply) Edit
New Formula Field (Comply)

Formula Field (Comply) Edit Save Save & New Cancel

Information

Field Name Opportunity Stage

Type Relationship

Business Object Agreement

Formula Related_Opportunity__r.StageName

Description

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**.

Formula Field (Comply) Edit
New Formula Field (Comply)

Formula Field (Comply) Edit Save Save & New Cancel

Information

Field Name Opportunity Type

Type Relationship

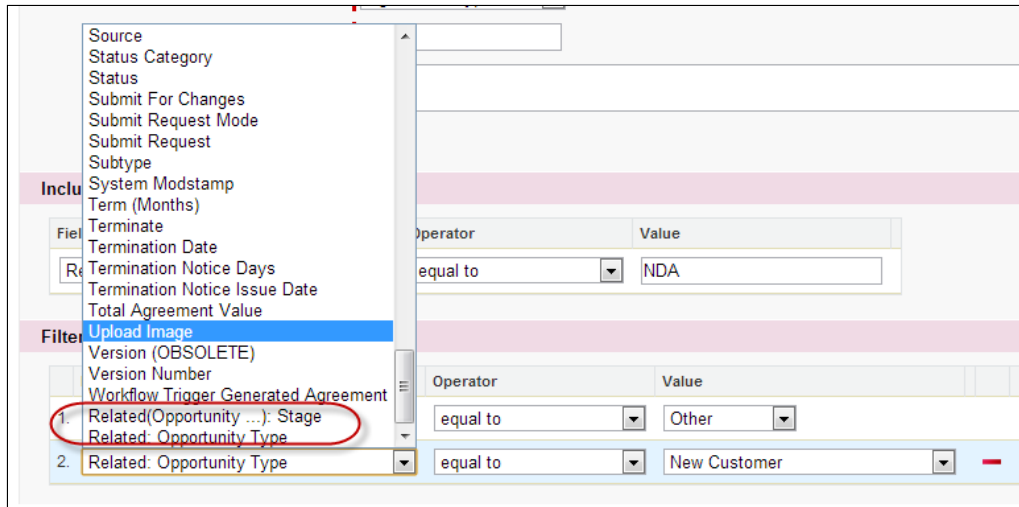
Business Object Agreement

Formula Related_Opportunity__r.Type

Description

Save Save & New Cancel

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.

Parent Agreement

Primary Contact

Requestor **User**

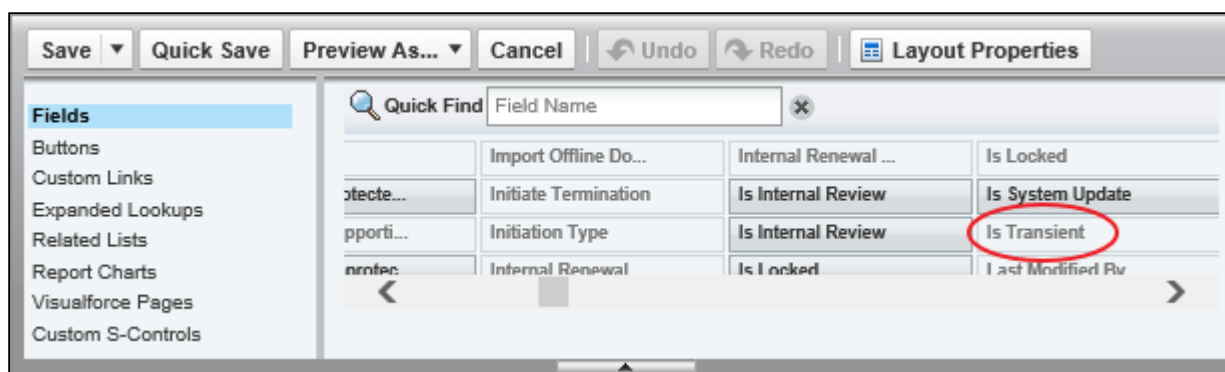
Owner

Is Transient

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.

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

Overriding Clone Behavior of Custom Objects

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


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

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.

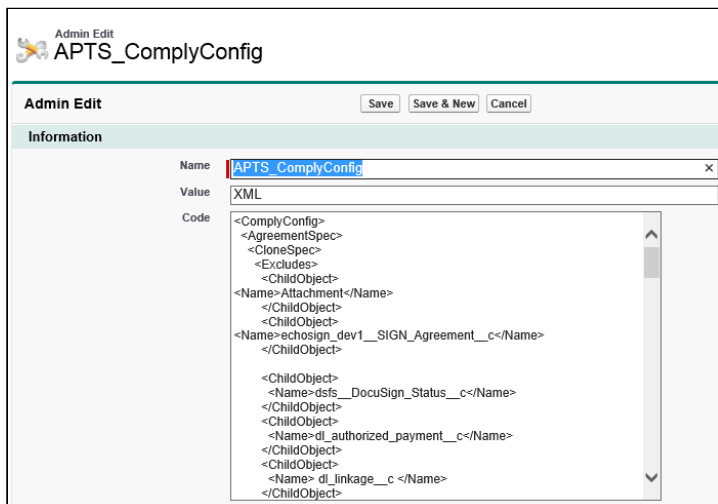
You can add Document Version Detail, Document Version, Note, and Attachment in the clone spec to copy documents to the cloned, amended, or renewed agreement (new agreement). The following table lists the various scenarios and their outcome when you use clone spec to clone, amend, or renew an agreement.

| 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 | <p>All the document details and documents from the document version are copied from Document Version and Document Version Detail to the new agreement.</p> <p>By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement.</p> <div data-bbox="1058 1037 1426 1200" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Conga recommends using this configuration.</p> </div> |
| False | False | True/False | True/False | <p>No documents are copied from Document Version and Document Version Detail to the new agreement.</p> <p>By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement.</p> |

| 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 | <p>Only the document details from the document version (the first level of the document version) are copied to the new agreement.</p> <p>By default, Note and Attachment/Files are copied to the new agreement. If excluded, documents are not copied to the new agreement.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i Conga does not recommend this configuration.</p> </div> |

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>
      </Includes>
    </CloneSpec>
  </AgreementSpec>
</ComplyConfig>
```

```
<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.

Admin Detail

| | |
|-------|---|
| Name | APTS_ComplyConfig |
| Value | XML |
| Code | <pre> <ComplyConfig> <AgreementSpec> <CloneSpec> <Excludes> <ChildObject> <Name>echosign_dev1__SIGN_Agreement__c</Name> </ChildObject> <ChildObject> <Name>Aptus__AgreementLineItem__c</Name> </ChildObject> </Excludes> <ClearFields> <ClearField> <Name>Aptus__Company_Signed_By__c</Name> </ClearField> <ClearField> <Name>Aptus__Company_Signed_Date__c</Name> </ClearField> <ClearField> <Name>Aptus__Company_Signed_Title__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Returned_Date__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Sent_Date__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Signed_By__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Signed_By_Unlisted__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Signed_Date__c</Name> </ClearField> <ClearField> <Name>Aptus__Other_Party_Signed_Title__c</Name> </ClearField> </ClearFields> </CloneSpec> </AgreementSpec> <TemplateSpec> <CloneSpec> <Excludes> </ChildObject> </pre> |

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 intended for guidance purpose 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 settings, and include Word attachment templates representing the bulk of actual contracts that can be used when creating a first draft . Templates can include standard and non-standard language. |
| Async Merge Call | Holds asynchronous merge calls |

| 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 <ul style="list-style-type: none"> • Header • Lookups • Related - In Section • Related - In Table | Yes | Yes | Yes | Yes |
| Insert Smart Merge Fields for corresponding Objects <ul style="list-style-type: none"> • Header • Lookups • Related - In Section • Related - In Table | Yes | Yes | Yes | Yes |
| Document Assembly Rules | Yes | No | No | No |
| Filtered Rows | Yes | Yes | Yes | Yes |
| Conditional content | Yes | Yes | Yes | Yes |

| 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 <ul style="list-style-type: none"> • With Redlines • Without Redlines • Final to be Signed • Watermark • Naming Override | Yes | Yes | Yes | Yes |
| Check-out document, attachment of the record | Yes | No | No | No |

| 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 <ul style="list-style-type: none"> • 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: <ol style="list-style-type: none"> 1. Merge-Comply-Proposals 2. X-Author | <ol style="list-style-type: none"> 1. Yes 2. Yes | <ol style="list-style-type: none"> 1. No 2. Yes | <ol style="list-style-type: none"> 1. No 2. Yes | <ol style="list-style-type: none"> 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.

i 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.

i 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.

i 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.

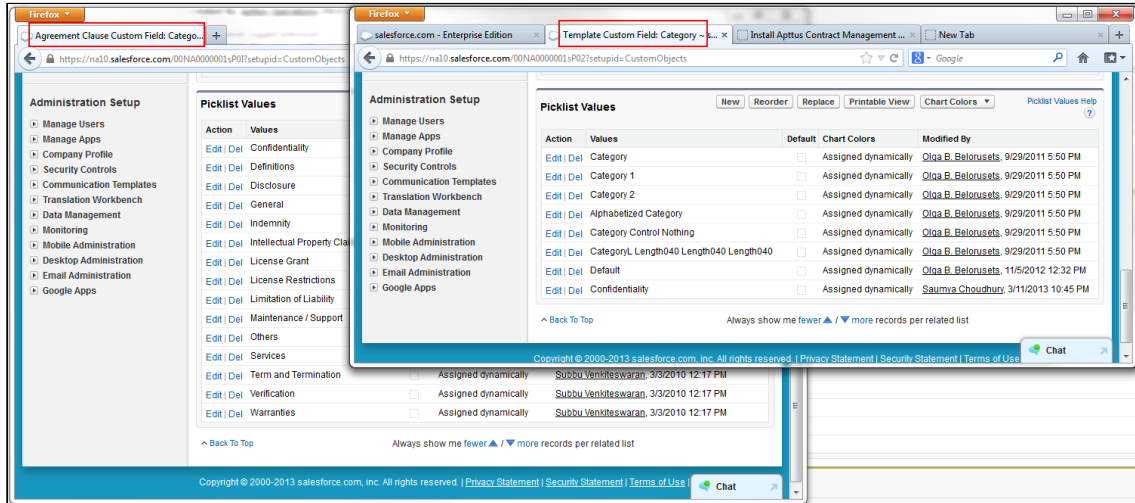
To maintain consistency, the **Category** and **Subcategory** values for the Agreement Clause custom object must match the **Category** and **Subcategory** values for the Template custom object. The `Apttus__Category__c` and `Apttus__Subcategory__c` API names refer to different objects though.

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.



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

The categories and subcategories for the **Agreement Clause** and **Template** objects match. You must associate the same categories and subcategories.

To Associate Categories and Subcategories

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

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

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

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 CLM and 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).

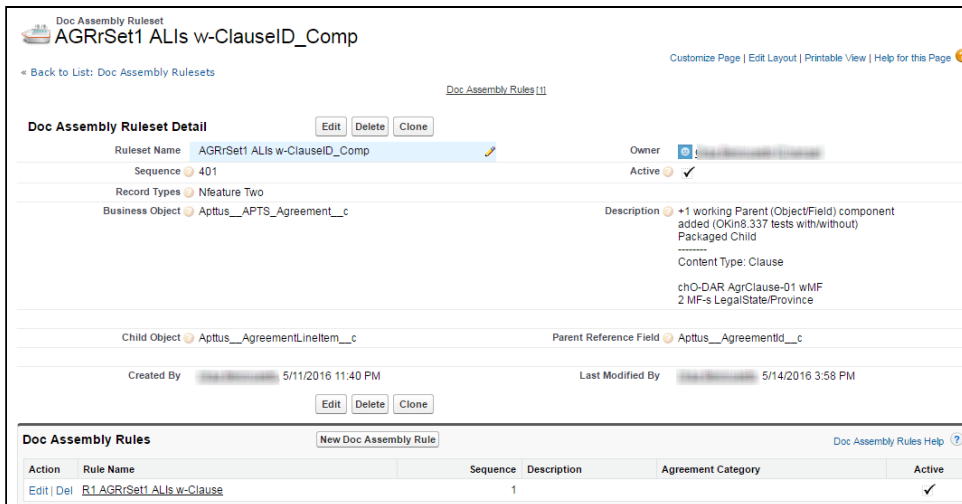
i A note on Record Types: In the modeling of your system, it is recommended to make every effort to ensure that any Template Agreement Types that make use of dynamic segments also be included in the Document Assembly Ruleset object Record Types picklist. For example, if you have NDA templates that make 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

The screenshot shows the configuration page for a Doc Assembly Rule. At the top, it displays the rule name 'R1 AGRSet1 ALIs w-Clause' and provides navigation links like 'Back to List: Doc Assembly Rulesets' and 'Customize Page | Edit Layout | Printable View | Help for this Page'. Below this is the 'Doc Assembly Rule Detail' section with fields for Rule Name, Sequence (1), Description, and Active status (checked). There are 'Edit', 'Delete', and 'Clone' buttons. A 'Filter By' section includes 'Agreement Category' (Sales), 'Created By' (Chris Castro, 5/16/2016 2:58 PM), and 'Last Modified By' (Chris Castro, 5/16/2016 2:58 PM). The 'Components' section at the bottom contains a table with columns for Action, Component Id, Sequence, Type, Component Type, Field Name, Attachment Id, Content, Insert Page Break, and Content Field Type. Two components are listed: one for 'Review Info' (Clause) and one for 'Footer' (Parent(ObjectField)).

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

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

Document Assembly Components

Clause

Doc Assembly Component Edit
AC-0000000074

Doc Assembly Component Edit [Save] [Save & New] [Cancel]

Information

Component Id AC-0000000074 Rule CN DAR Group 1

Sequence 1

Type MSA Definitions

Content CN MSA Definitions

[Save] [Save & New] [Cancel]

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

Attachment

Doc Assembly Component
AC-0000000043

Edit Layout | Printable View | Help for this Page

< Back to List: Doc Assembly Rulesets

Doc Assembly Component Detail [Edit] [Delete] [Clone]

Component Id AC-0000000043 Rule R1 AGRrSet1 ALIs w-Clause

Sequence 2

Type Footer Field Name Apttus__ProductId__c

Content Content Field Type

Insert Page Break

Component Type Parent (Object/Field)

Attachment Id

Created By Last Modified By

[Edit] [Delete] [Clone]

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

Dynamic Document Assembly Workflows

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

- [Dynamic Document Assembly Workflow: Clauses](#)
The 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.

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

Doc Assembly Rule Filter Logic

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

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


Creating a Document Assembly Fieldset

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

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

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

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

 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.

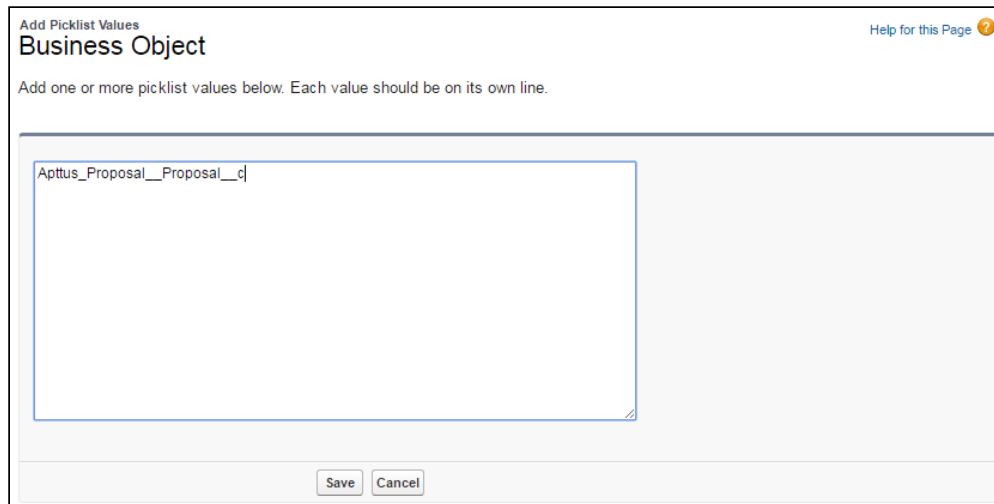
4. Click **Save**.

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.



The screenshot shows a dialog box titled "Add Picklist Values" for the "Business Object". The dialog contains the instruction "Add one or more picklist values below. Each value should be on its own line." Below this instruction is a text input field with the value "Apttus_Proposal__Proposal__c" entered. At the bottom of the dialog are "Save" and "Cancel" buttons. A "Help for this Page" link is visible in the top right corner.

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.
- Go to the **Doc Assembly Rulesets** tab and click **New**.
 - 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, or Apttus_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.

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

Configuring Dynamic Document Assembly Custom Properties

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

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

Custom Setting Help for this Page ?

Comply Custom Properties

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

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

View: All ▾ [Create New View](#)

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

New

| Action | Name ↑ |
|--|--|
| Edit Del | Apttus Proposal Proposal_c |
| Edit Del | Apttus APTS Agreement_c |

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.

The screenshot shows the 'Comply Custom Properties Edit' interface. At the top, it says 'Provide values for the fields you created. This data is cached with the application.' Below this is a header 'Edit Comply Custom Properties' with 'Save', 'Save & New', and 'Cancel' buttons. The main section is 'Comply Custom Properties Information' with a legend 'I = Required Information'. The fields are: 'Name' (Apttus__APTS_Agreement), 'Doc Assembly Rule Field Set Name' (Apttus__DocAssemblyFilterF), 'Doc Assembly Rule Static Field Set Name' (empty), and 'Child Object Types' (empty).

- 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**.

The screenshot shows the 'Comply Custom Properties Edit' interface for a different object. The fields are: 'Name' (Apttus_Proposal__Proposal), 'Doc Assembly Rule Field Set Name' (Apttus_Proposal__QuoteDoc), 'Doc Assembly Rule Static Field Set Name' (empty), and 'Child Object Types' (empty).

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

i 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.

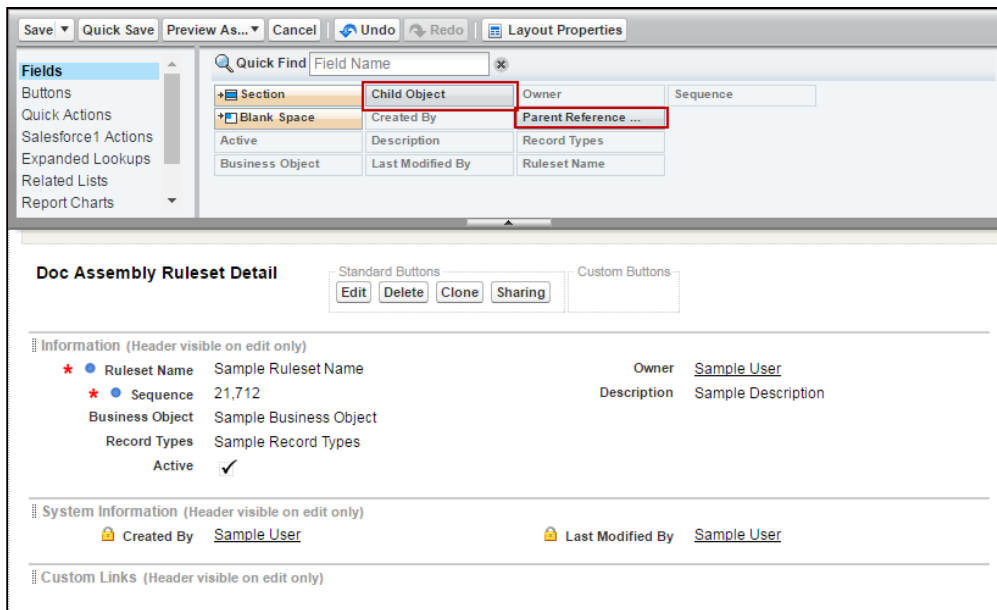
1. From **Setup**, go to **Create > Objects > Doc Assembly Component**.
2. From **Custom Fields & Relationships**, click **Type**.
3. From **Picklist Values**, click **New** and add the required type values and save them.

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.



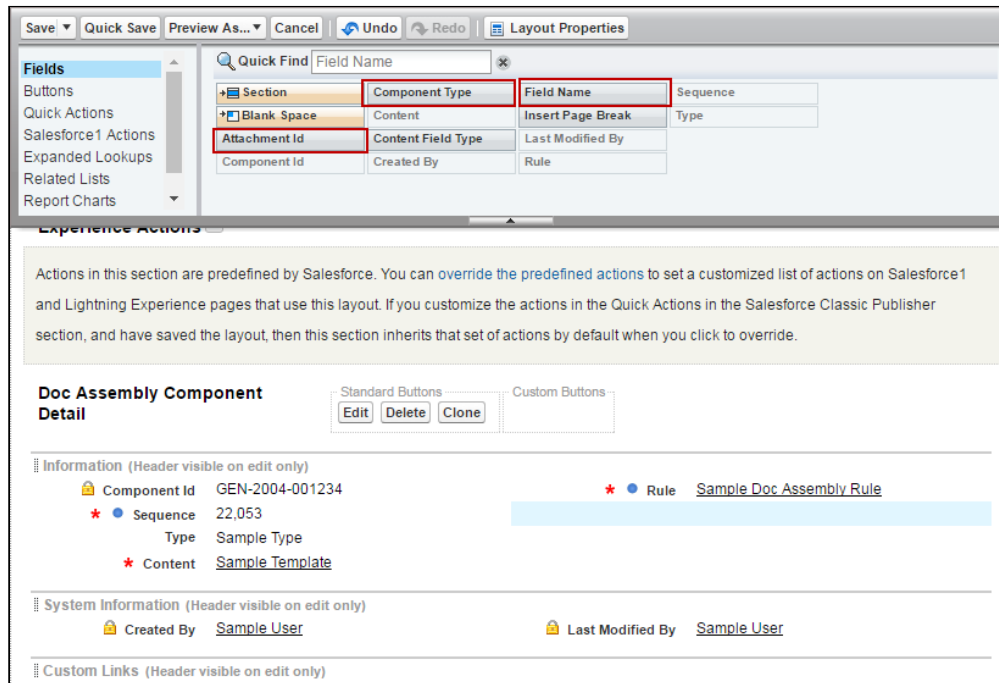
4. Click **Save**. Repeat this process for each Ruleset Layout you have created.

Adding Attachment Fields to the Doc Assembly Component Page Layout

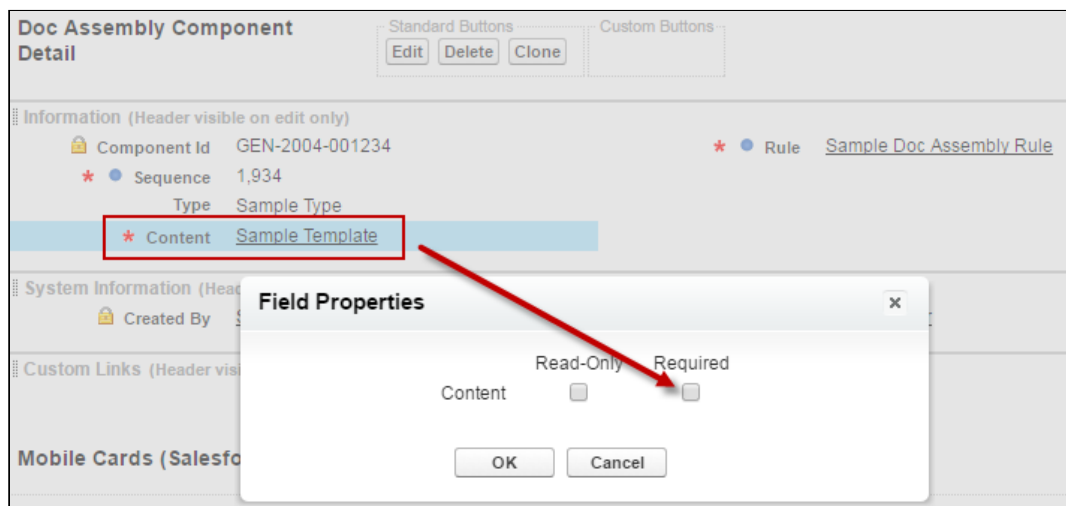
In order to configure Doc Assembly Component for line item attachment support, you must add three (3) fields to the page layout.

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

- From **Page Layouts**, click **Edit**.
- From the Layout editor, drag and drop the **Component Type**, **Field Name**, and **Attachment ID** fields into the Information section.



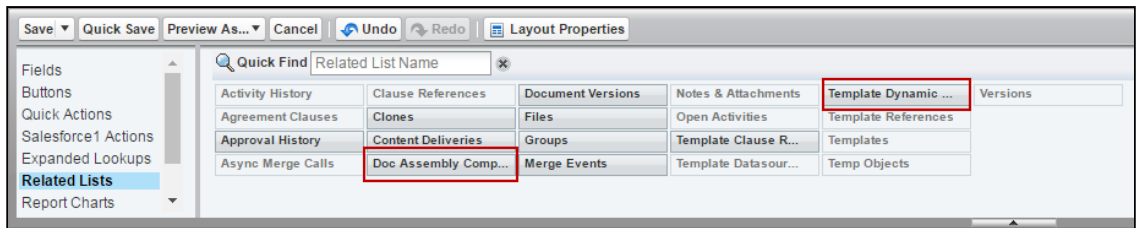
- Click the configuration icon next to the **Content** field to display Field Properties.
- Click the **Required** check box to make the Content field no longer required. You must make this field optional because you may not include Clause template components in your Ruleset.



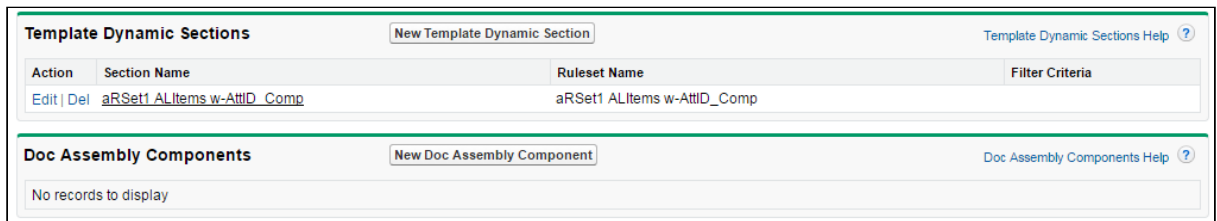
- Click **Save**.
- Repeat this process for each Ruleset Layout you have created.

Including the Related Lists

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



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



Enabling DAR for the Proposal Object (Optional)

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

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

Add Picklist Values

Business Object

Help for this Page ?

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

Apttus_Proposal__Proposal__c

Save Cancel

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

Creating Doc Assembly Rulesets

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

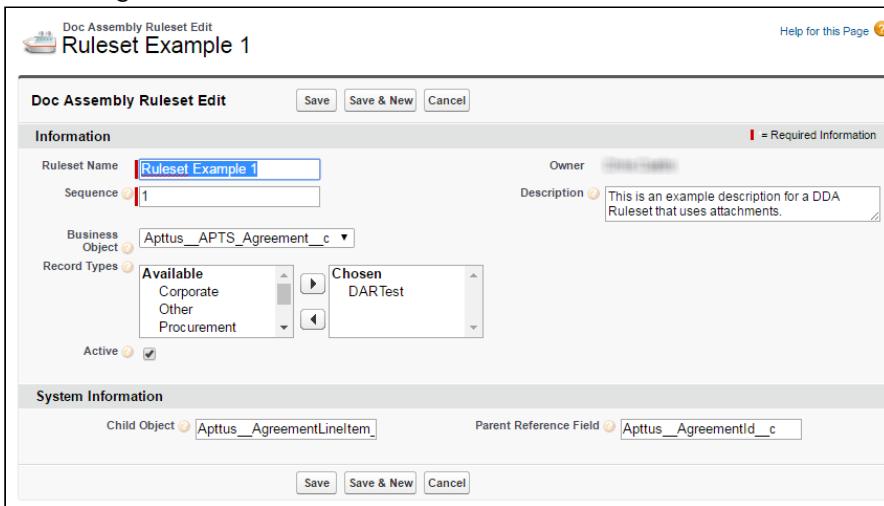
1. Go to the **Doc Assembly Rulesets** tab and click **New**. The Doc Assembly Ruleset form is displayed.

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, or Apttus_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. |

| | |
|--------------------------------|--|
| <p>Child Object</p> | <p>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;</p> <ul style="list-style-type: none"> • <i>Apttus__AgreementLineItem__c</i> • <i>Agreement_Product__c</i> • <i>Apttus_Proposal__Proposal_Line_Item__c</i> <p>These API names must also be represented in the Comply Custom Properties as described in the previous section on this page.</p> |
| <p>Parent Reference</p> | <p>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.</p> |

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.

Doc Assembly Component Edit
Help for this Page ?

New Doc Assembly Component

Doc Assembly Component Edit
Save Save & New Cancel

Information
! = Required Information

Sequence !

Type ? --None-- ▼

Content ? ?

Component Type ? Clause ▼

Rule ? DAR Rule 1 ?

Field Name ?

Attachment Id ?

Save Save & New Cancel

2. Enter the following values for the Component:

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

| | |
|-----------------------|--|
| Component Type | <p>Choose the Component Type to determine the specific content that is inserted into the generated document for this component. Component Types can be:</p> <ul style="list-style-type: none">• Clause - use this Component Type when you want the inserted content to be the clause specified by the <i>Content</i> 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 | <p><i>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.</i></p> <ul style="list-style-type: none"> • Attachment (Object/Field) - Field Name can refer to an attachment through a field on the context record (e.g. Agreement Line Item) or through a relationship. Examples: <ul style="list-style-type: none"> • <i>ProductId__r.ShortDescription__c</i>, where ShortDescription__c is a field on the Product that points to an attachment. • <i>ProductSpec__c</i> is a formula field on the Agreement Line Item object. The Attachment ID is pulled from the formula field value (the formula value can be a relationship, as above, or any other formula that returns text in the form of an Attachment ID). • Parent (Object/Field) - Field Name should be the API name of the Parent Reference field that points to the record where the attachment resides. For example, if the context object for the Ruleset is Agreement Line Item, then the parent reference field could be <i>Apttus__ProductId__c</i>. |
| Attachment Id | <p><i>Only applicable if the Component Type = Attachment (Id). Enter the Attachment ID of a specific attachment on any object.</i></p> |

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

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

To create new templates or edit existing templates and include Dynamic Sections in them, 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 different line.
If you want to add **Agreement Term Exception** custom object in the picklist value for **Search Filter (Comply)**, type *Apttus__Agreement_Term_Exception__c*.
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:

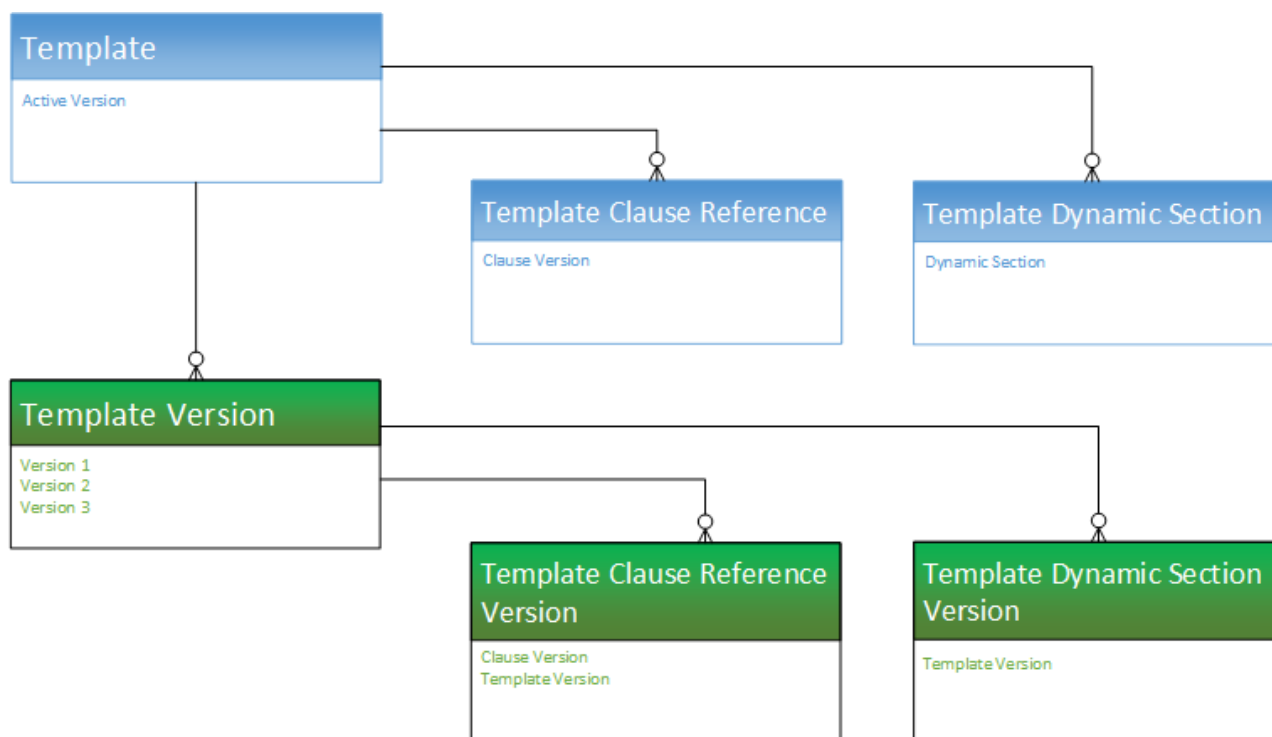
- Survey older contracts by viewing their associate template version to understand what was in the template at generation.
- Revert to previous template versions.
- Clone template versions to begin a new template lifecycle.
- Publish updated clauses and nested clauses across specific template versions.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

How Template Versioning Works

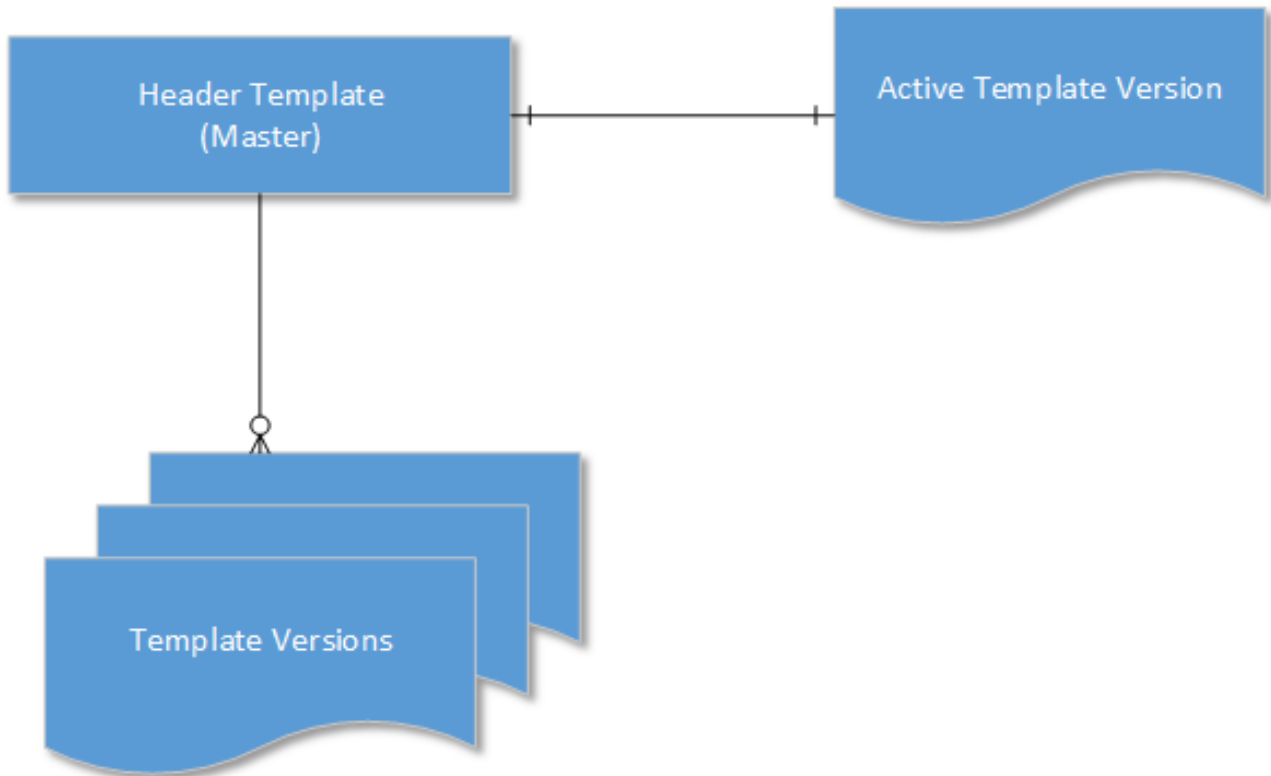
Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template, and multiple child references to clauses and

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 Template Version that stores dynamic section references

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

Enabling Template Versioning

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

The following steps are required:

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

The following steps are optional:

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

Enabling Template Versioning

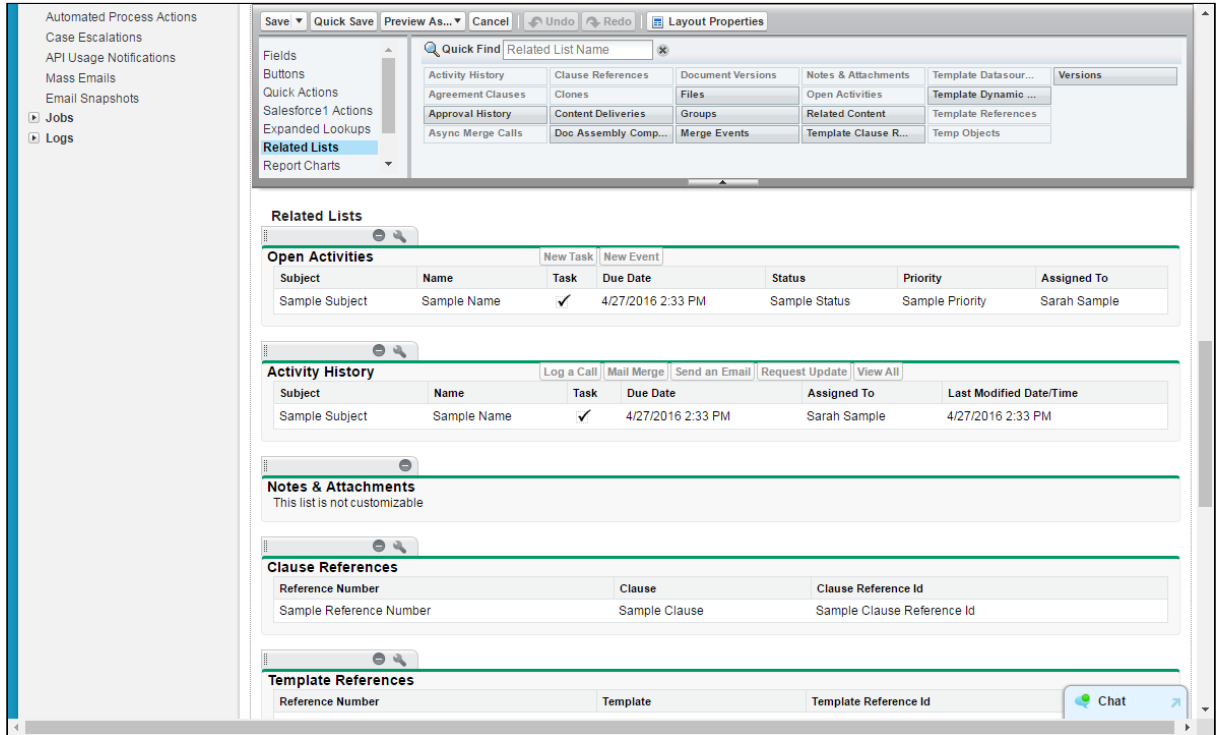
1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** next to Comply System Properties.
3. Click **Edit** next to System Properties. The System Properties form is displayed.

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

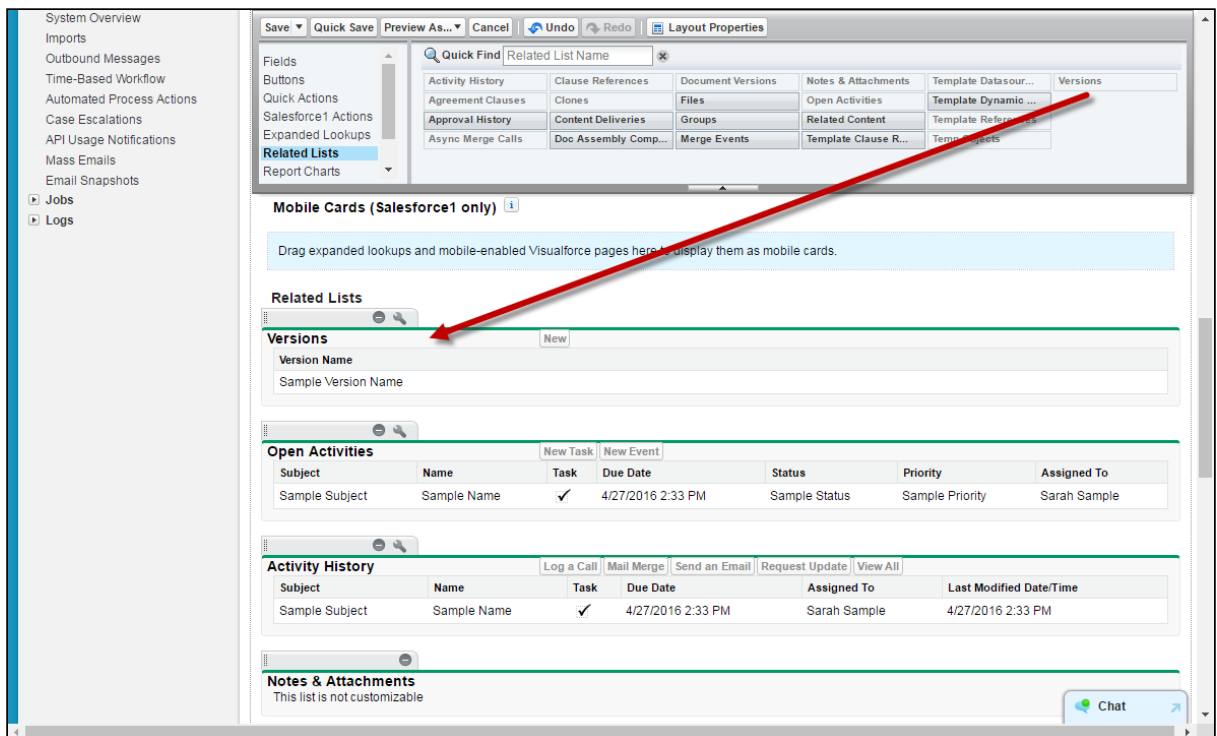
4. Check **Enable Template Versioning**.
5. Click **Save**. Template Versioning is now enabled in your org.

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**.

The screenshot displays the Salesforce interface for editing a Template layout. The left sidebar shows navigation options under 'Build', 'Customize', 'Create', 'Objects', 'Develop', 'Deploy', and 'Monitor'. The main content area is titled 'Template Detail' and includes a 'Fields' section at the top with a search bar and a list of fields. Below this, the 'Template Detail' section is divided into 'Information', 'Publishing', and 'Content & Mergefields'.

| Field Name | Field Name | Field Name | Field Name | Field Name | Field Name |
|------------------|-----------------|----------------------|----------------------|--------------|------------------|
| Section | Agreement Types | Checkout Date | Created By | Guidance | Language |
| Blank Space | Business Object | Checkout Version | Description | IsActive | Last Modified By |
| Activate Version | Category | Cloned From | Excluded Merge Ch... | Is Transient | Locale |
| Active Version | Checkout By | Cloned From Refer... | Framework Format | Keywords | Mergefields |

Template Detail

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

Custom Buttons: [Empty]

Information (Header visible on edit only)

| | | | |
|-----------------|------------------------|-----------------------|------------------------------|
| Name | Sample Name | Owner | Sample User |
| Type | Sample Type | Cloned From | Sample Template |
| Reference | Sample Reference | Cloned From Reference | Sample Cloned From Reference |
| Description | Sample Description | Term Exception | Sample Term Exception |
| Agreement Types | Sample Agreement Types | Keywords | Sample Keywords |
| Category | Sample Category | Guidance | Sample Guidance |
| Subcategory | Sample Subcategory | Language | Sample Language |
| IsActive | ✓ | Locale | Sample Locale |
| | | Next Revision Date | 4/27/2016 |
| | | Created By | Sample User |
| | | Last Modified By | Sample User |

Publishing

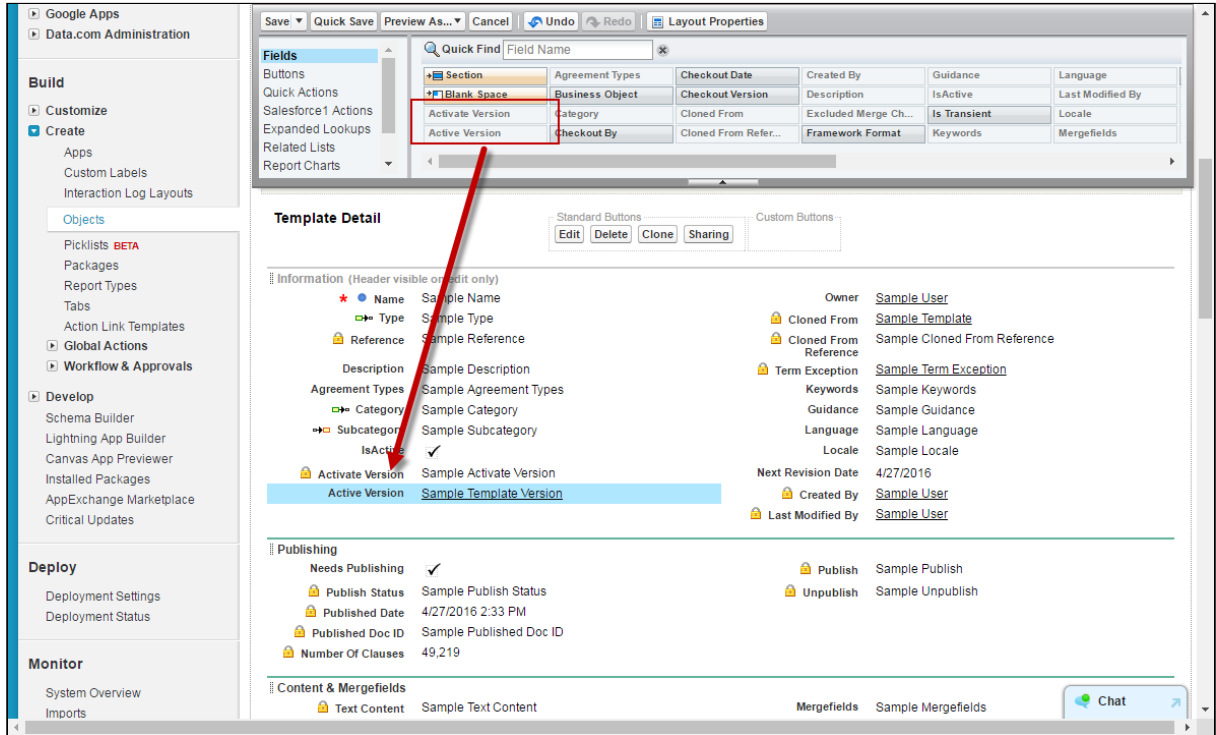
| | | | |
|-------------------|-------------------------|-----------|------------------|
| Needs Publishing | ✓ | Publish | Sample Publish |
| Publish Status | Sample Publish Status | Unpublish | Sample Unpublish |
| Published Date | 4/27/2016 2:33 PM | | |
| Published Doc ID | Sample Published Doc ID | | |
| Number Of Clauses | 49,219 | | |

Content & Mergefields

| | | | |
|--------------|---------------------|-------------|--------------------|
| Text Content | Sample Text Content | Mergefields | Sample Mergefields |
|--------------|---------------------|-------------|--------------------|

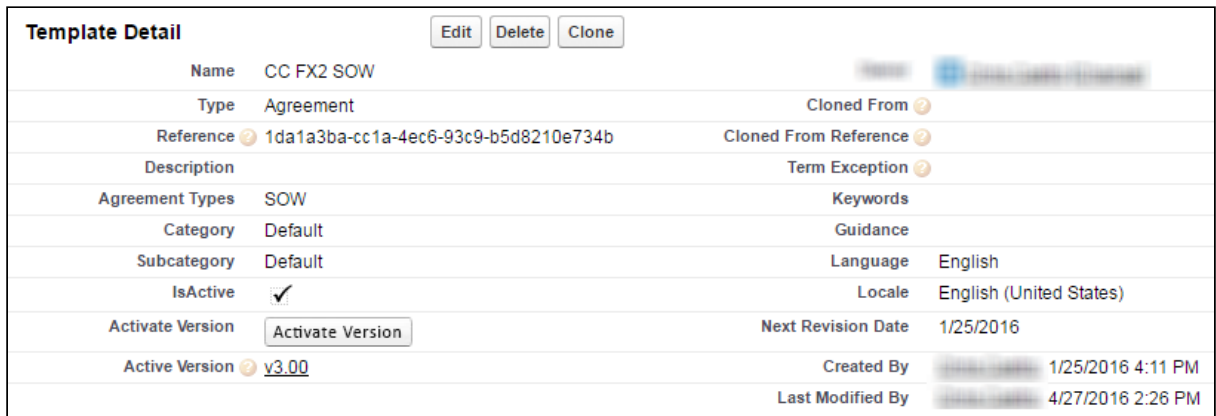
Chat [Icon]

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.

Template
CC FX2 SOW

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

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

Template Detail Edit Delete Clone

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

▼ Publishing

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

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

Activation

Version Modified By

Last Modified After Last Modified Before

Template Versions

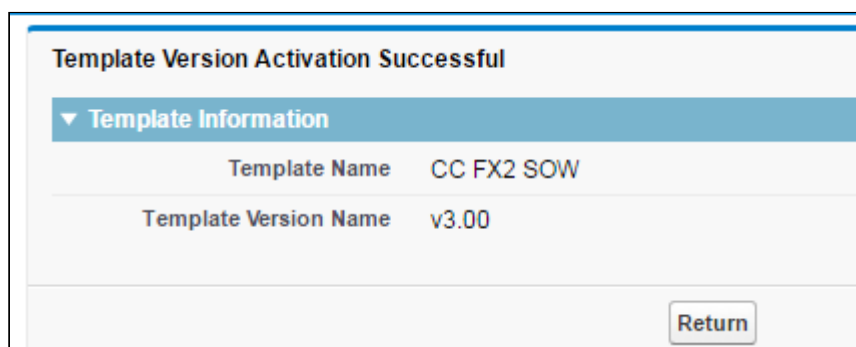
Page 1 of 1 << Previous Next >> Records per page

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

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

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

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



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

Cloning Template Versions

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

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

- You can only clone the *active version* of a template.
- Cloning a template record is just like creating a new one except a copy of the document you are cloning is attached to the new record as the first version.

To clone a template version

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

Template
CC FX2 SOW

Customize Page | Edit Layout | Printable View |

« Back to List: Custom Object Definitions

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

Template Detail Edit Delete Clone

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

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

Template Edit
CC FX2 SOW Copy

Help for this Page

Template Edit Save Save & New Cancel

Information Required Information

| | | | |
|------------------|--|-----------------------|----------------------------|
| Framework Format | FX2 | Owner | Chris Castro |
| Name | CC FX2 SOW Clone | Cloned From | CC FX2 SOW |
| Type | Agreement | Cloned From Reference | 1da1a3ba-cc1a-4ec6-93c9-b5 |
| Reference | 7deef6da-63b0-4810-aa4-a9c | Term Exception | |
| Description | | Keywords | |
| Agreement Types | <div style="display: flex; justify-content: space-between;"> <div> <p>Available</p> <ul style="list-style-type: none"> Default NDA SLA </div> <div> <p>Chosen</p> <ul style="list-style-type: none"> SOW </div> </div> | Guidance | |
| Category | Disclosure | Language | English |
| Subcategory | Category 1 | Locale | English (United States) |
| IsActive | <input checked="" type="checkbox"/> | Next Revision Date | 1/25/2016 [5/11/2016] |
| Active Version | | | |

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

Template
CC FX2 SOW Clone

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

« Back to List: Custom Settings

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

Template Detail [Edit] [Delete] [Clone]

Framework Format FX2 Owner [User]

Name CC FX2 SOW Clone Cloned From CC FX2 SOW

Type Agreement Cloned From Reference 1da1a3ba-cc1a-4ec6-93c9-b5d8210e734b

Reference 7deef6da-63b0-4810-aaf4-a966d35b6de0 Term Exception

Description Keywords

Agreement Types SOW Guidance

Category Disclosure Language English

Subcategory Category 1 Locale English (United States)

IsActive Next Revision Date 1/25/2016

Activate Version [Activate Version] Created By [User]

Active Version v1.00 Last Modified By [User]

Publishing

Content & Mergefields

Active version set to v1.00
New Version record created

Versions [New Template Version] [Versions Help]

| Action | Version Name |
|------------|--------------|
| Edit Del | v1.00 |

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

Notes & Attachments [New Note] [Attach File] [View All]

Active template document copied to cloned record

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

To View Parent Template Version

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

1. Go to **Templates** tab to view the template record.
2. Go to **Versions** related list.
3. In the versions related list you can see the parent version of the current template in the **Parent Version** column. You can also see the active version from the **Active Version** field in the Publish Templates related list. The parent version of the new

template created is blank because it does not have a parent template.

The screenshot displays the 'Template Detail' page for a template named 'CLM-1891 Test A1'. The 'Active Version' is set to 'v3.00'. Below this, the 'Versions' table lists four versions: v1.00, v2.00, v3.00 (which is active), and v4.00. The 'Parent Version' column in the table is highlighted with a red box, showing values v1.00, v2.00, and v1.00 for the first three rows.

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.

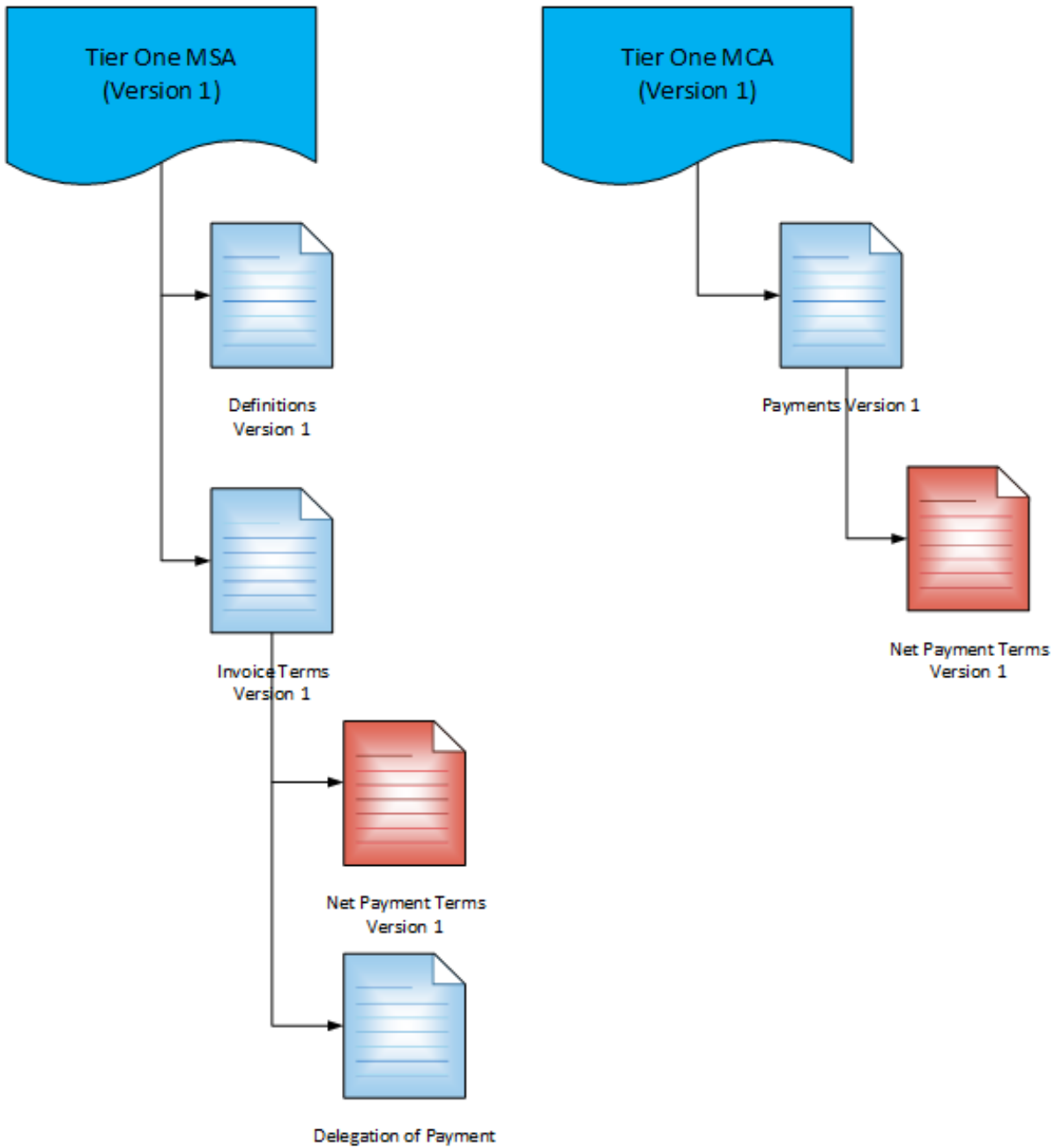
Template Versioning allows you to be more selective when publishing templates. You can choose which versions to publish, updating nested clauses in some versions while preserving older versions of your clauses in other templates. In template versioning, publishing adopts a "bottom-up" approach. You publish 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 not yet been versioned and is published, the template is published with two versions: a pre-published version and the published version.

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

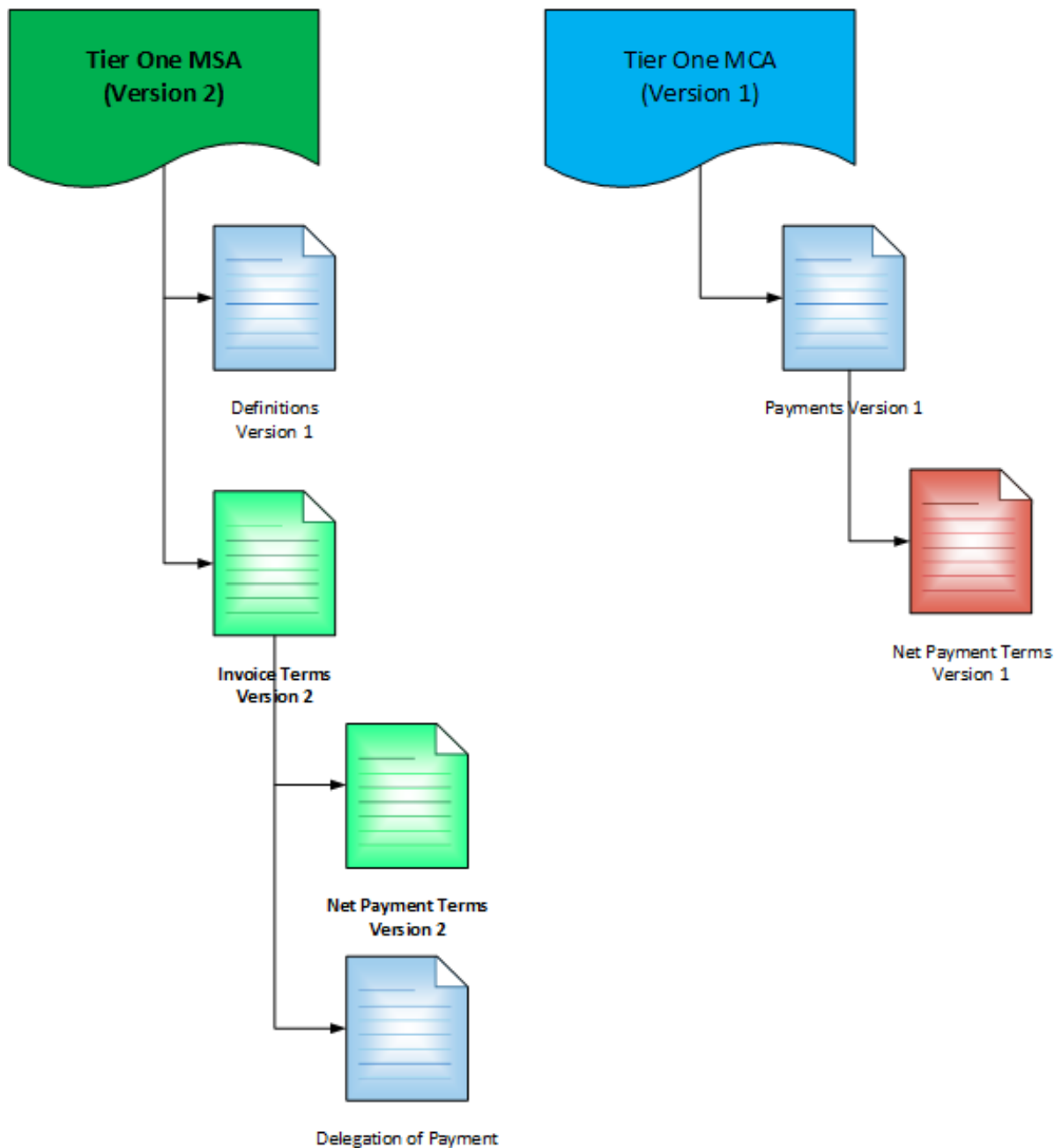
Sam Sales works for Tier One Systems, and is managing two different master templates, MSA and MCA. Both templates contain the same Net Payment Terms clause (version 1.0). The figure below represents the template and clause hierarchy for both templates. Note the Net Payment Terms clause is nested under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

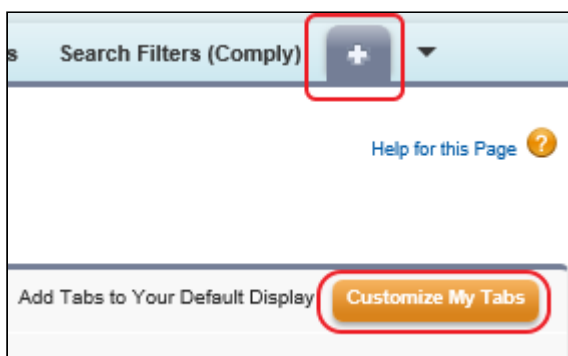
Universal unique identifier (UUID) fields of the agreement templates, clause templates, and term exceptions in Contract Management support the functionality available with the X-Author Migration Manager.

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.

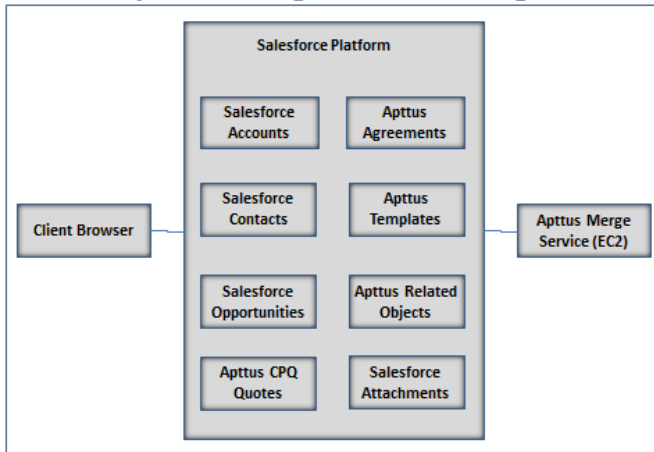
Document Generation Capabilities

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.

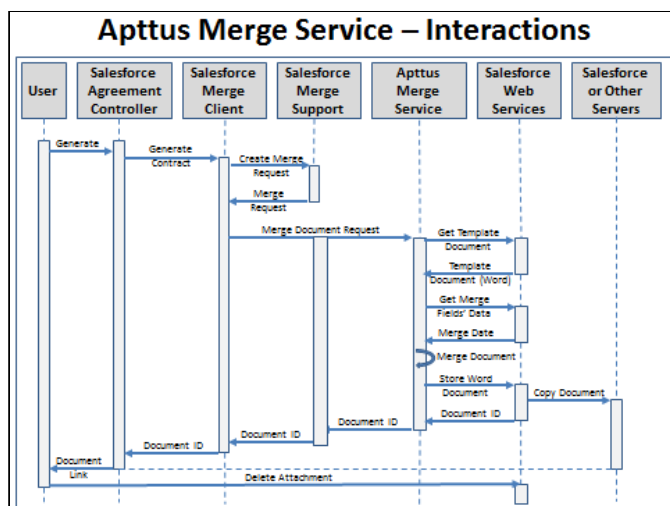
Apttus Merge Service – Logic



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 | <p>Merge Webservice Endpoint</p> <p>Setup Steps:</p> <ol style="list-style-type: none"> 1. Salesforce Admin setting: Remote Site Settings > ApttusMergeServer 2. Comply System Properties > Merge Webservice Endpoint 3. Proposal System Properties > Merge Webservice Endpoint <p>For more information, refer Appendix B > Custom Settings > Proposal System Properties in CPQ documentation.</p> <p>*Admin - for backward compatibility</p> | Setup 1 & 2 | Setup 1 & 3 | Setup 1 & 2 | Setup 1 & 2 |

| | Setup required for a Feature | Agreement Object | Quote/ Proposal Object | Std. Salesforce Objects | Other Custom Objects |
|---|---|------------------|------------------------|-------------------------|----------------------|
| 2 | <p>Controlling Merge Call Time-out (default 60 secs) Setup Steps:</p> <ol style="list-style-type: none"> 1. Comply System Properties > Merge Call Timeout Millis 2. Proposal System Properties > Merge Call Timeout Millis <p>For more information, refer Appendix B > Custom Settings > Proposal System Properties in CPQ documentation.</p> <p>*Admin - for backward compatibility Max 60,000; Recommended 30,000</p> | Setup 1 | Setup 2 | Setup 1 | Setup1 |
| 3 | <p>Publish Merge Events Comply System Property > Publish Merge Events</p> | X | NSP | NSP | NSP |

| | 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 | <p>Generation PDF Security</p> <p>Setup steps:</p> <p>1a. Select Comply System Properties > Enable PDF Security</p> <p>1b. Enter a password value for Comply System Properties > PDF Owner Password</p> <p>1c. Create/Modify <i>APTS_ComplyConfig</i> Admin object for PDF security defaults (optional)</p> <p>See Enabling PDF Security for Agreement Documents for details.</p> <p>2a. Proposal System Properties > Enable PDF Security</p> <p>2b. Proposal System Properties > PDF Owner Password</p> <p>2c. Create/Modify <i>APTS_ProposalConfig</i> Admin object for PDF security defaults (optional)</p> <p>See Enabling PDF Security on Generated Quote/ Proposal Document in CPQ documentation.</p> | Setup 1(a,b,c) | Setup 2 (a,b,c) | Setup 1 (a,b, c) | Setup 1 (a,b,c) |

| | Setup required for a Feature | Agreement Object | Quote/ Proposal Object | Std. Salesforce Objects | Other Custom Objects |
|---|--|------------------|------------------------|-------------------------|----------------------|
| 6 | <p>Generation Word Document Protection Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: <ul style="list-style-type: none"> 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 | <p>Versioning Word Document Protection</p> <p>Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_Protection 2. Create Admin > APTS_Password 3. Create Agreement Protection table entries for the following pairs: 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 | <p>Async Mode of Merge</p> <p>Setup steps:</p> <ol style="list-style-type: none"> 1. Create Admin > APTS_AsyncMergeCall 2. Create Admin > APTS_AsyncMergeEmail <p>Calls over 60 seconds are processed.</p> <p>*Custom objects with related lists are not supported</p> | Setup 1 & 2 | Setup 1 & 2 | *Setup 1 & 2 | *Setup 1 & 2 |

| | Setup required for a Feature | Agreement Object | Quote/ Proposal Object | Std. Salesforce Objects | Other Custom Objects |
|----|---|---|---|--|---|
| 9 | <p>Template setup for default system filtering on Generate and other Template functionality from X- Author Contracts</p> <p>Setup steps:</p> <ol style="list-style-type: none"> 1. Agreement Object > Record Types picklist values 2. Template Object > Agreement Type picklist values 3. Template Object > Business Object picklist values <p>*Template Object setup - For internal use only</p> | <ol style="list-style-type: none"> 1. X 2. Add Object record types Values 3. X | <ol style="list-style-type: none"> 1. X 2. Add Object record types Values 3. X | <ol style="list-style-type: none"> 1. Add Object Value 2. Add Object record Types Values 3. X | <ol style="list-style-type: none"> 1. Add Object Value 2. Add Object record types Values 3. Add API name of Custom Business Object |
| 10 | <p>Auto Enabling Checking In for Final version in PDF format</p> <p>Setup steps:</p> <ul style="list-style-type: none"> • Comply System Properties > Auto Enable PDF Final Docs • Comply System Properties > Allow PDF Select Override | X | NSP | NSP | NSP |

| | Setup required for a Feature | Agreement Object | Quote/ Proposal Object | Std. Salesforce Objects | Other Custom Objects |
|--------|---|------------------|------------------------|-------------------------|----------------------|
| 1 1 | Auto Enable Reconciliation Setup steps: <ul style="list-style-type: none"> • Comply System Properties > Auto Enable Reconciliation • Comply System Properties > Allow Reconcile Override | X | NSP | NSP | NSP |
| 1 2 | Header / Footer Stamp Setup steps: <ul style="list-style-type: none"> • Comply System Properties > Auto Insert Header Footer • Comply System Properties > Agreement Number Field For Imported Docs • Comply System Properties > Footer Datetime Format For Imported Docs | X | NSP | NSP | NSP |
| 1 3 | Enabling Term Exceptions in Author <ul style="list-style-type: none"> • Create Admin > EnableTermExceptionsInAuthor <p>* Available for all Template types (valid association with TE - only for Agreement Clause Template)</p> | 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 |
|--------|---|------------------|------------------------|-------------------------|----------------------|
| 2 5 | 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 |
| 2 6 | Check-in Third Party Document. Import Offline - Create record and attach | X | NSP | NSP | NSP |
| 2 7 | Check-in Third Party Document. Import Offline - Attach to existing record | X | NSP | NSP | NSP |
| 2 8 | Check-in Document, attachment of the record - With Redlines - Without Redlines - Final to be Signed - Watermark - Naming Override | X | NSP | NSP | NSP |
| 2 9 | 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 |
|----|---|------------------|------------------------|-------------------------|----------------------|
| 30 | Compare Documents, attachments of the record | X | NSP | NSP | NSP |
| 31 | Locking Refresh Lock | X | NSP | NSP | NSP |
| 32 | Create Section Save selection as Agreement Clause | X | NSP | NSP | NSP |
| 33 | Playbook: Insert Clause into the Document on the records | X | NSP | NSP | NSP |
| 34 | Reconcile Documents - Highlight Smart Fields - Reconciliation of the values | X | NSP | NSP | NSP |
| 35 | Tag Smart Fields | X | NSP | NSP | NSP |
| 36 | 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.

| Picklist Value Set | |
|--------------------|---------------------|
| Action | Values |
| Edit Del | Agreement |
| Edit Del | Clause |
| Edit Del | Proposal |
| Edit Del | Section |
| Edit Del | Supporting Document |
| Edit Del | Invoice |
| Edit Del | Invoice Statement |

Setting up Template: Agreement Type

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

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 |

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

| Field Dependencies | | | New |
|--|-----------------|-----------|-----|
| Action | Dependent Field | Data Type | |
| Edit Del | Business Object | Picklist | |

- Create a dependency between the Template Type for your custom object and the Business Object you defined in Step 5. Click on the Business Object API name in the list under your custom object type and click **Include Values**. In the below example, "Invoice__c" is included in the "Invoice" dependent picklist.

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

[Include Values](#) [Exclude Values](#)

| Showing Columns: 6 - 7 (of 7) & Previous Next & View All > Go to | | |
|--|---|---|
| Type: | Invoice | Invoice Statement |
| Business Object: | Apttus__APTS_Agreement__c | Apttus__APTS_Agreement__c |
| | Apttus__Proposal__Proposal__c | Apttus__Proposal__Proposal__c |
| | Invoice__c | Invoice__c |

Showing Columns: 6 - 7 (of 7) & Previous | Next & View All

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

[Include Values](#) [Exclude Values](#)

- If you intend to define clauses to use in your custom object templates, you also need to add your custom business object to the Clause dependent picklist. Click on the Business Object API name in the list under "Clause" and click **Include Values**. In the below example, "Invoice__c" is included in the "Clause" dependent picklist.

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

[Include Values](#) [Exclude Values](#)

| Showing Columns: 1 - 5 (of 7) & Previous Next & View All > Go to | | | | | |
|--|---|---|---|---|---|
| Type: | Agreement | Clause | Proposal | Section | Supporting Document |
| Business Object: | Apttus__APTS_Agreement__c | Apttus__APTS_Agreement__c | Apttus__APTS_Agreement__c | Apttus__APTS_Agreement__c | Apttus__APTS_Agreement__c |
| | Apttus__Proposal__Proposal__c | Apttus__Proposal__Proposal__c | Apttus__Proposal__Proposal__c | Apttus__Proposal__Proposal__c | Apttus__Proposal__Proposal__c |
| | Invoice__c | Invoice__c | Invoice__c | Invoice__c | Invoice__c |

Showing Columns: 1 - 5 (of 7) & Previous | Next & View All

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

[Include Values](#) [Exclude Values](#)

- 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**.

The screenshot shows the Salesforce 'New Custom Field' configuration page for an Invoice object. The page is titled 'Step 2. Choose output type' and 'Step 2 of 5'. The 'Field Label' is 'Generate Invoice' and the 'Field Name' is 'Generate_Invoice'. Under 'Formula Return Type', the 'Text' option is selected. The page includes 'Previous', 'Next', and 'Cancel' buttons.

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/Apptus__DocumentGenerate?id="&Id &

"&action=Generate_Document&templateType=Invoice", IMAGE("/resource/Apttus__Button_Generate", "Generate"), "_self")

The screenshot shows the 'New Custom Field' configuration page for an 'Invoice' object. The page is at 'Step 3 of 5: Enter formula'. The formula editor contains the following text:

```
Generate Invoice (Text) =
HYPERLINK("/apex/Apttus__DocumentGenerate?id=&Id & "&action=Generate_Document&templateType=Invoice",
IMAGE("/resource/Apttus__Button_Generate", "Generate"), "_self")
```

Red annotations in the image point to:

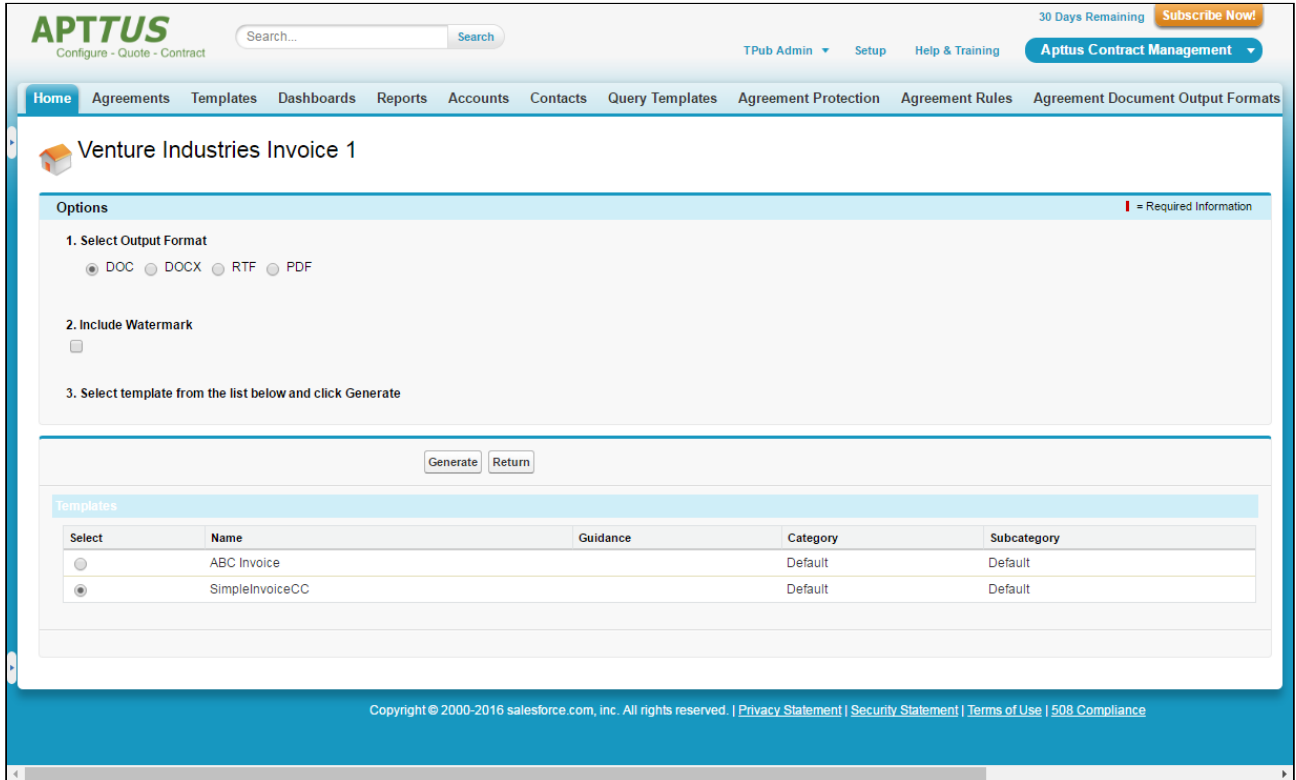
- The 'Invoice' field type selected in the 'Select Field Type' dropdown.
- The 'Generate Invoice (Text)' label for the custom field.
- The formula text in the editor, with 'Apttus__DocumentGenerate' and 'Invoice' circled.

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.

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

Setup Agreement Document Output Formats

Select Profile: System Administrator

Agreement Type Formats for Profile: System Administrator

| Agreement Type | Prompt | DOC | DOCX | PDF | RTF | PDF/A | PDF/i | Allow Override | Include Watermark | Allow Override (Watermark) |
|---------------------|-----------------------|-----------------------|----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------------|--------------------------|----------------------------|
| << Profile Level >> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Information: 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.

- To add or remove a watermark, select or clear Allow Override (Watermark).
- 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:

- Select the **Agreement Document Output Formats** tab.
Setup **Agreement Document Output Formats** page is displayed.
- 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 regenerate 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

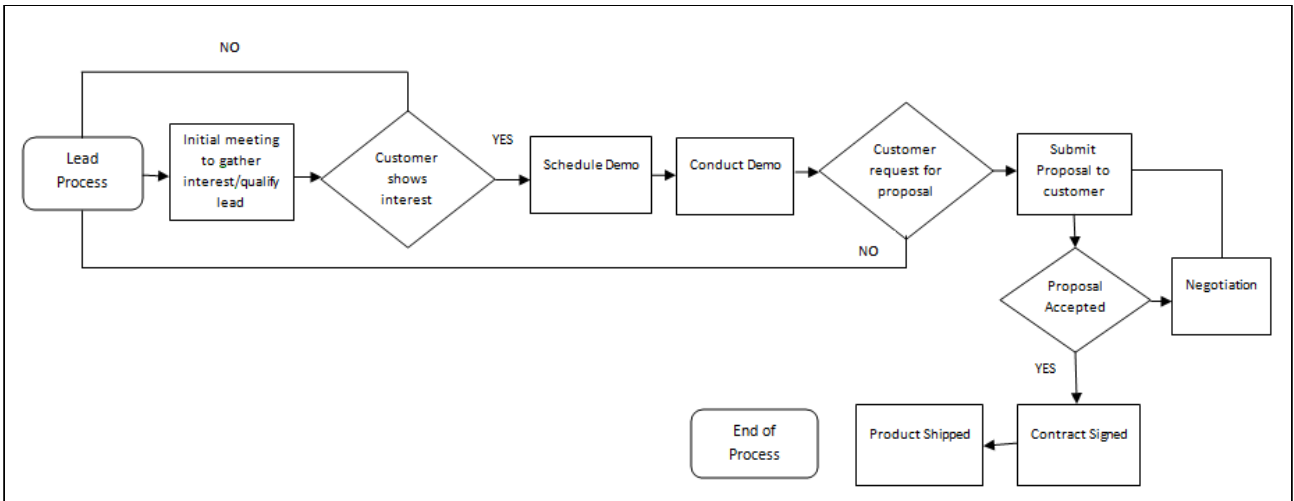
Contract Lifecycle Management includes processes that contribute, create or utilize contract data. Conga CLM has defined the contract lifecycle to encompass everything from the initial request right through to the settlements of financial transactions around the agreement and enables you to have complete 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.

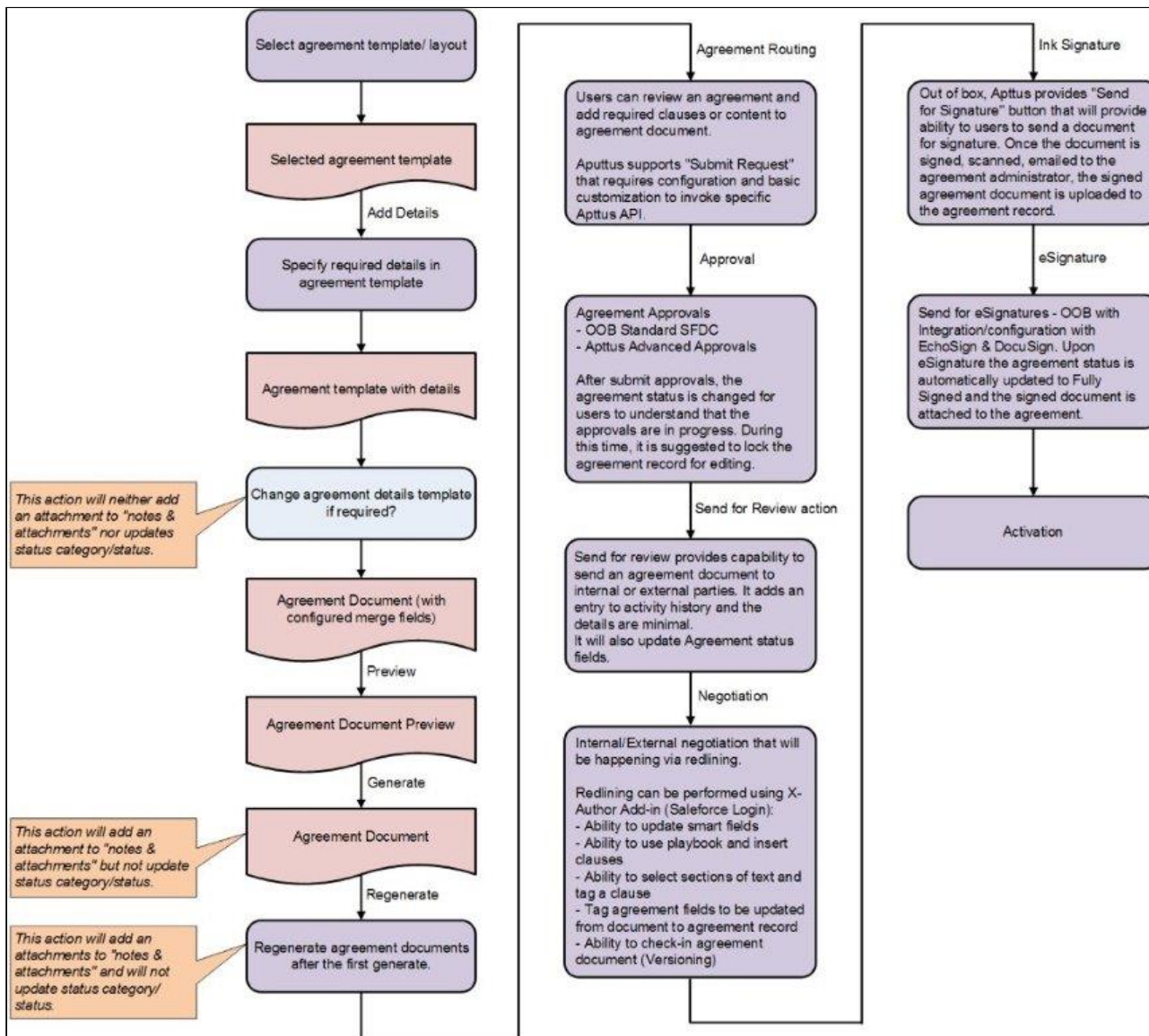
- Leverage Salesforce as a central repository for all corporate contractual agreements.
- Set up a central repository, which provides visibility into contractual commitments, and reduces the risk of litigation and revenue leakage.
- Setup alerts and notifications around predefined trigger points.

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: Read. Template: Read |

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

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

i 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.

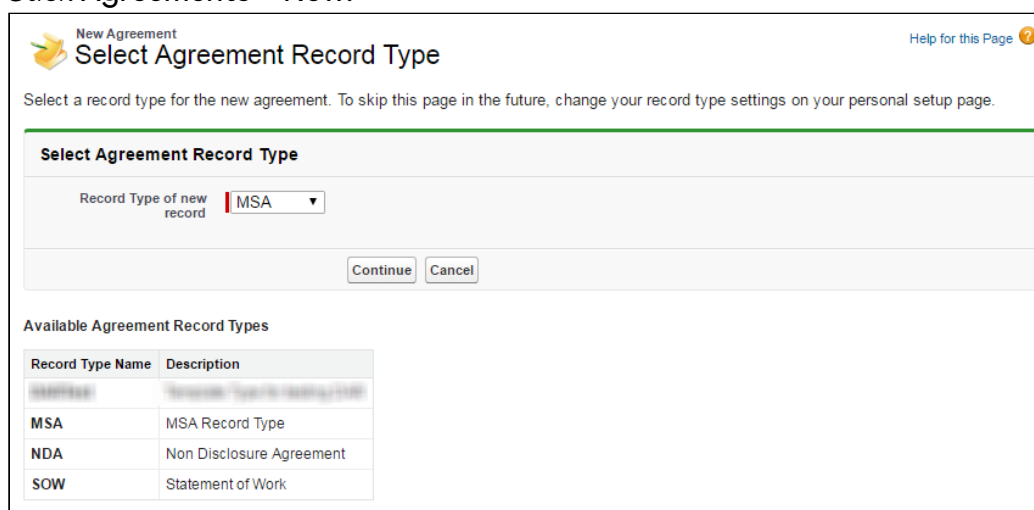
5. In the Inclusion Criteria section, select the field and expression you want to use as entry criteria for the filter. For example, if you want to use agreement records of MSA record type, it can be included in the Inclusion Criteria.
6. In the Filter Criteria section, select the fields and expressions 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**.



New Agreement Help for this Page

Select Agreement Record Type

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

Select Agreement Record Type

Record Type of new record: MSA

Continue Cancel

Available Agreement Record Types

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

i 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**.

i 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](#).


i 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. <i>This is useful if you need to create a master and subordinate agreement or related agreements, such as the primary agreement and a related Non-Disclosure Agreement (NDA), and want to save time by jumping right from creating the first agreement record to creating another one.</i> |
| Cancel | Click Cancel to adjourn the process of editing the Agreement Record and discard all the changes made since the last edit. Click Yes to confirm your selection. |

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

| Agreement Section | Description |
|---------------------|--|
| Actions | Lists the various actions you can execute for a particular stage of the agreement process. For details on agreement actions with the description of their respective functions, see Appendix H: Agreement Actions . |
| Notes & Attachments | Enables you to attach any reference document or file relevant to a particular agreement. The agreement document when generated from the template is stored by the application in this section. |
| Agreement Documents | Enables you to store reference to external URL or files. Common uses for this functionality is to store the URL reference to a document stored within the computer firewall. |

| Agreement 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 | <p>Initiate and track approvals corresponding to the agreement.</p> <div data-bbox="699 1088 1426 1249" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Approvals can be initiated only if the corresponding approval rules or process has been setup by the System Administrator.</p> </div> |
| Activity History | Lists an audit history of significant changes during the life of the agreement. |
| Related Agreements (To and From) | Enables users to relate other agreements in the repository for reference purposes. For example, the NDA with a particular vendor can be associated to the Master Services Agreement with the same vendor to enable a single point of access for all relevant information for this account. The 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. |

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

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

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

- Click **View Refresh** in 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):

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

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

- Inserting a clause into an agreement document using Playbook
- Marking a clause in the document and replacing its content with clause content from Playbook.
- Marking a clause in the document to adopt the properties of a marked 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 <i>Inserted</i> . | Creates a single record in Agreement Clause related list with Action as <i>Inserted</i> . |
| After inserting a clause using Playbook or Mark Clause, you make changes to the clause content. | Contract negotiator changes a warranty period from 1 year to 2 years in the same session "Housing Rent Allowance" is inserted. | Creates a single record in Agreement Clause related list with Action as <i>Inserted</i> . | Creates 2 records in Agreement Clause related list: <ul style="list-style-type: none"> • One with Action as <i>Inserted</i>. • One with Action as <i>Modified</i>. |
| Once you insert a clause using the Playbook or Mark Clause, you decide to remove the entire clause or Unmark the clause from the Mark Clause Panel. | Contract negotiator decides that "Housing Rent Allowance" clause does not belong in the contract and chooses to remove it in the same session it has been inserted. | No record in the Agreement Clause related list. | No record in the Agreement Clause related list. |

Subsequent Sessions

| Actions taken on the Clause before Check-In | Example | At Check-In without Reconciliation | At Check-In with Reconciliation |
|--|--|---|---|
| You do not make any changes to the clause content. | "Housing Rent Allowance" clause is not modified in a session after it is inserted. | No update to the Agreement Clause related list. | No update to the Agreement Clause related list. |

| 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 <i>Modified</i> . |
| Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce. | Contract negotiator decides that "Housing Rent Allowance" ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion. | No update to the Agreement Clause related list. | Creates a single record in the Agreement Clause related list with Action as <i>Deleted</i> . |

Tracking Agreement Clause Versions

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

Using Agreement Clause Versioning you can:

- Add a **Master Agreement Clauses** section to the Agreement record layout that provides a listing of all clauses referenced in the primary agreement document from initial check-out to activation.
- Drill down into the list to view all **Clause Iterations** for a specific clause.
- Drill down into each clause iteration to **Clause Iteration Details** to review changes to clause language.

- Customize reports (using standard Salesforce functionality) to locate agreements by clause and/or clause language.

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

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

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

Note

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

- [Adding Master Agreement Clauses to the Agreement Layout](#)
- [Viewing Master Agreement Clauses](#)
- [Viewing Clause Iterations](#)
 - [Clause Iteration Records](#)
 - [How Clause Iterations are Recorded](#)
 - [Use Case: Clause Versioning Scenario \(SOW\)](#)

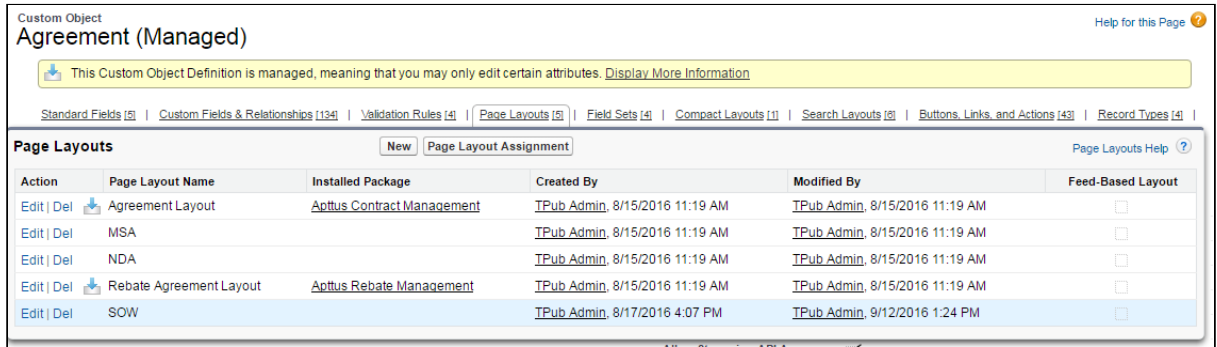
Adding Master Agreement Clauses to the Agreement Layout

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

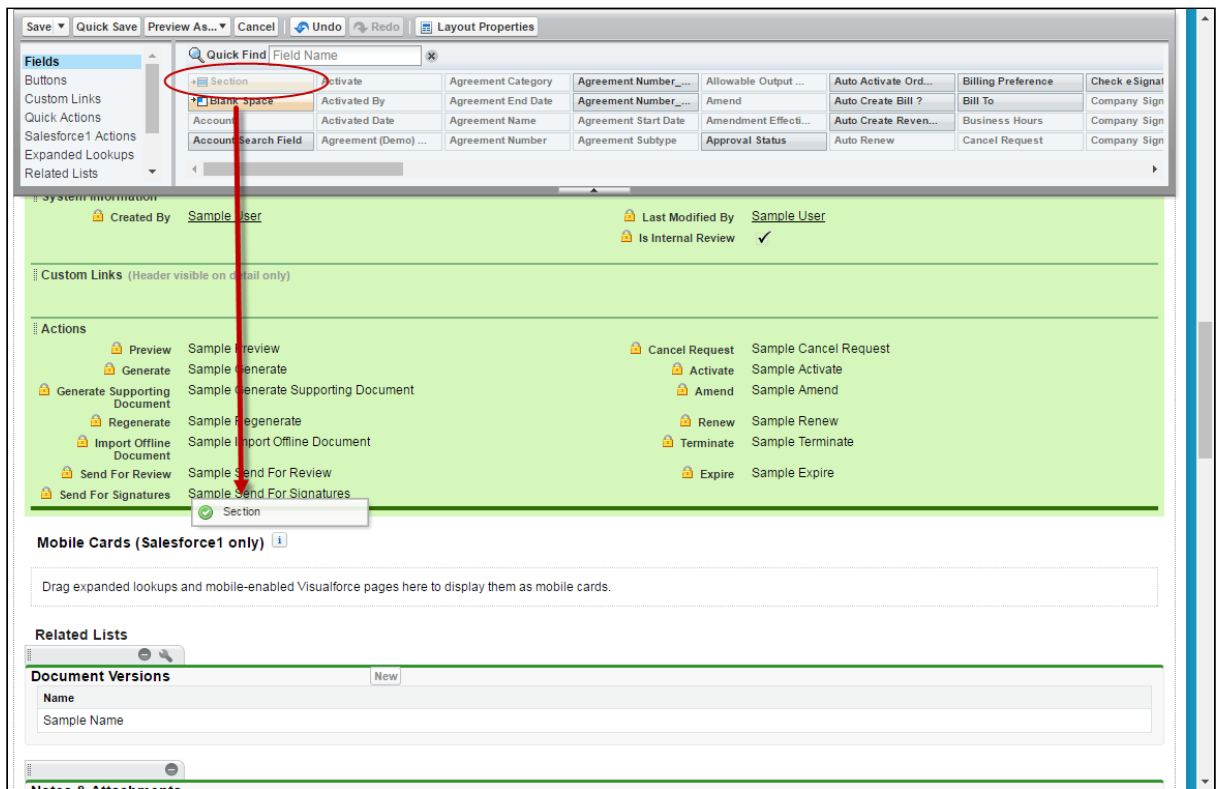
To make it visible on the agreement record, you must add it to the appropriate agreement layout.

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

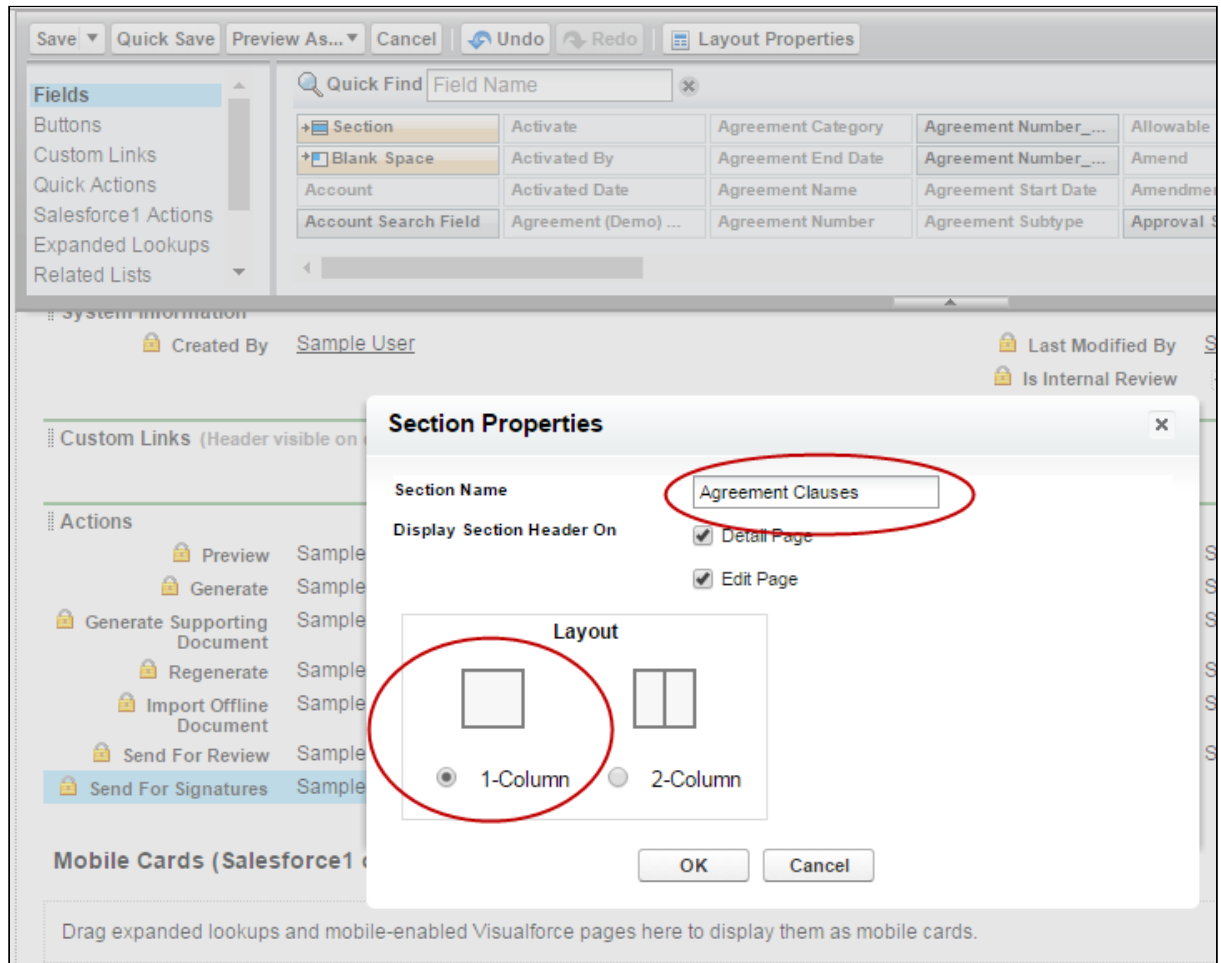
- Under Page Layouts, click the **Edit** link next to the layout you want to modify.



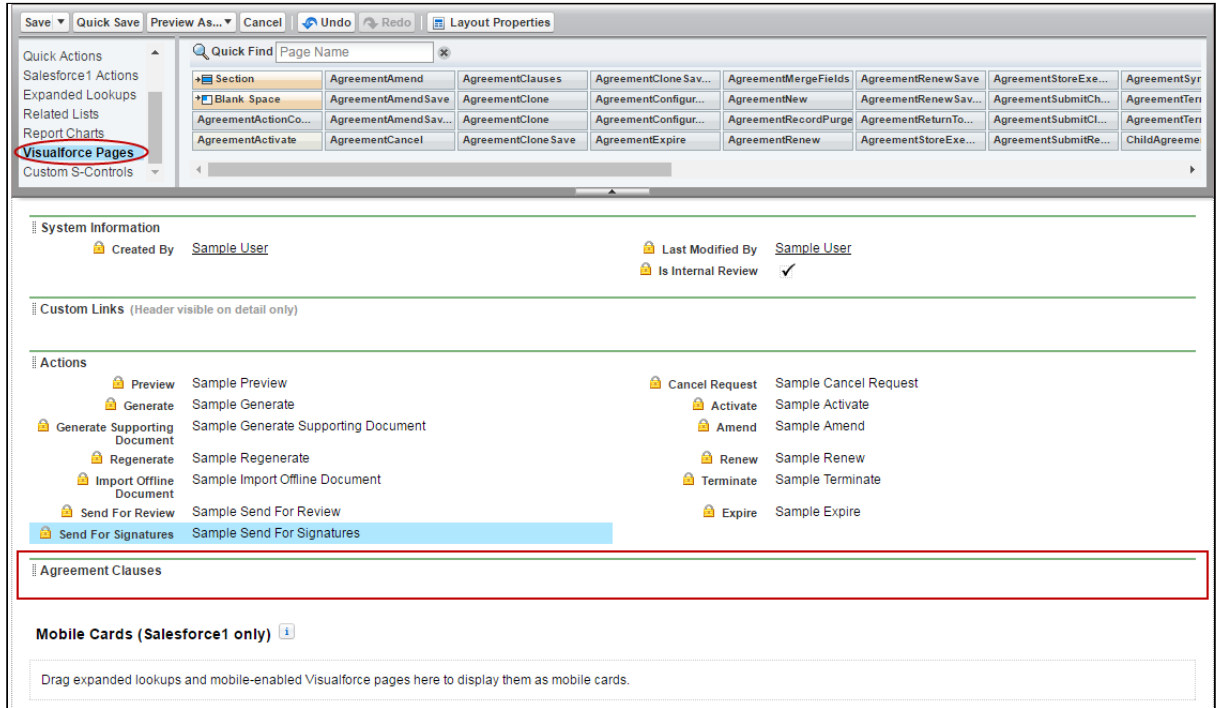
- Drag-and-drop the **Section** field onto the area below the Actions section of the Agreement layout.



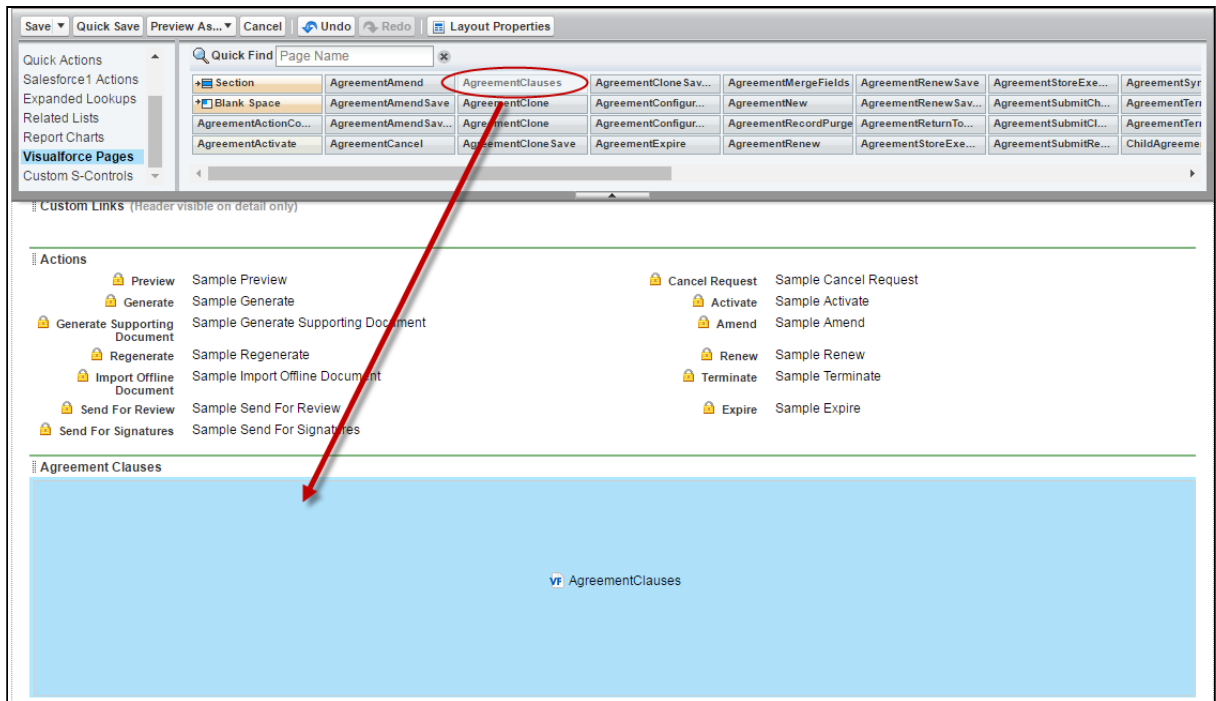
- Enter **Agreement Clauses** as the section name and choose a **1-Column** layout.




5. Click **OK**. The Agreement Clauses section is created.
6. From the Layout Designer menu, choose **Visualforce Pages**.



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



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

Viewing Master Agreement Clauses

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

| ▼ Agreement Clauses | | | | | | | |
|---|--|-----------------|----------|------------|-------------------|-------------|-------------------|
| Master Agreement Clauses | | | | | | | |
| Name | Clause Text | Iteration Count | Action | Created By | Created On | Modified By | Modified Date |
| CC Deliverables | DELIVERABLES/SCHEDULE:The delivera... | 1 | Original | TPub Admin | 10/03/16 21:47:53 | TPub Admin | 10/03/16 21:47:53 |
| CC Technical Requirements | TECHNICAL REQUIREMENTS: The followi... | 1 | Original | TPub Admin | 10/03/16 21:47:53 | TPub Admin | 10/03/16 21:47:53 |
| CC Termination | Term and TerminationTerm. This License Ag... | 1 | Original | TPub Admin | 10/03/16 21:47:54 | TPub Admin | 10/03/16 21:47:54 |
| CC Governing Law | Governing Law. This Agreement shall be go... | 1 | Original | TPub Admin | 10/03/16 21:47:58 | TPub Admin | 10/03/16 21:47:58 |

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

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

Viewing Clause Iterations

You can drill down into each master clause from the previous list to view a list of iterations the clause has gone through during negotiation. Sorted by action, if the agreement is activated, clause iterations will be listed from the "Final" version descending to the

"Original" version. The following example shows a Payment Terms clause that has gone through several iterations, ending with the Final version.

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

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

| Clause Iterations Details | |
|---------------------------|---|
| Back | |
| Agreement Number | 00000048.0 |
| Agreement Name | Sales SOW VI 10.3.16.1 |
| Account Name | Venture Industries |
| Clause Text | PAYMENTS The first payment for this agreement will be made within two business days of 10/3/2016, failing which a late fee of \$1000 will be charged. The last payment must be made within 12 months of the first payment. All payments due under this Agreement shall be payable in Japanese Yen, converted at the spot rate at the close of the business day in which each such payment becomes payable. Unless specified otherwise herein, RTU will invoice SPA for Clinical Supply, Commercial Product and/or Promotional Sample upon RTUs delivery thereof to SPAs carrier and payments shall be due within fifteen (15) days from the date of receipt of invoice. All payments under this Agreement shall be by appropriate electronic funds transfer in immediately available funds to such bank account as RTU shall designate. Each payment shall reference this Agreement and identify the obligation under this Agreement that the payment satisfies. If at any time legal restrictions prevent the remittance of part or all of payments owed by a Party hereunder, the Parties shall promptly negotiate in good faith the terms for repayment under lawful means or methods. |
| Previous Text | PAYMENTS The first payment for this agreement will be made within two business days of 10/3/2016, failing which a late fee of \$1000 will be charged. The last payment must be made within 12 months of the first payment. All payments due under this Agreement shall be payable in Japanese Yen, converted at the spot rate at the close of the business day in which each such payment becomes payable. Unless specified otherwise herein, RTU will invoice SPA for Clinical Supply, Commercial Product and/or Promotional Sample upon RTUs delivery thereof to SPAs carrier and payments shall be due within thirty (30) days from the date of receipt of invoice. All payments under this Agreement shall be by appropriate electronic funds transfer in immediately available funds to such bank account as RTU shall designate. Each payment shall reference this Agreement and identify the obligation under this Agreement that the payment satisfies. If at any time legal restrictions prevent the remittance of part or all of payments owed by a Party hereunder, the Parties shall promptly negotiate in good faith the terms for repayment under lawful means or methods. |
| Diff Text | PAYMENTS The first payment for this agreement will be made within two business days of 10/3/2016, failing which a late fee of \$1000 will be charged. The last |

Clause Iteration Records

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

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

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

Clause activity during negotiation and subsequent check-in includes:

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

Note

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

How Clause Iterations are Recorded

Two factors determine how clause activity is recorded during negotiation:

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

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

Initial Session (1st Check-Out)

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

| Clause Actions before Check-In | Example | At Check-In without Reconciliation | At Check-In with Reconciliation |
|---|---|--|--|
| After inserting a clause using Playbook or Mark Clause, you make changes to the clause content. | Contract negotiator changes a warranty period from 1 year to 2 years in the same session "Housing Rent Allowance" is inserted. | Creates a single record in 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: <ul style="list-style-type: none"> • 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 <i>Modified</i> . |
| Once you Check-Out the same agreement document, you, as a Legal counsel, decide to permanently delete a clause from the document. You mark that clause for deletion from the Mark Clause Panel and Check-In the agreement document to Salesforce. | Contract negotiator decides that "Housing Rent Allowance" ought to be struck from the contract in a session after it had been inserted. Contract negotiator marks the clause for deletion. | No update to Clause Iterations. | Clause record is removed from Master Clause Listing ("Deleted" change recorded in Agreement Clause Related List) |

Use Case: Clause Versioning Scenario (SOW)

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

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

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

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

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

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

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

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

| Clause Iterations | | | | | | | |
|----------------------|----------|---|--|---|------------------------------|--|--|
| Back | | Agreement 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.

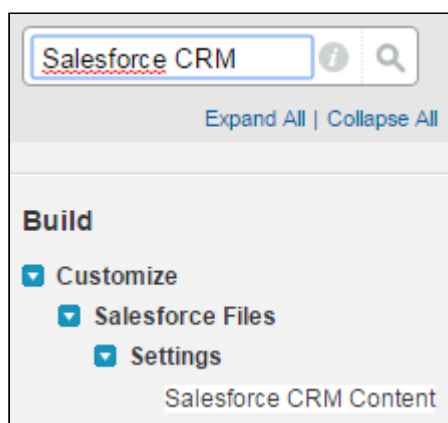
Installing Apttus Content Integration

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**.

Salesforce CRM Content

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

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

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

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.

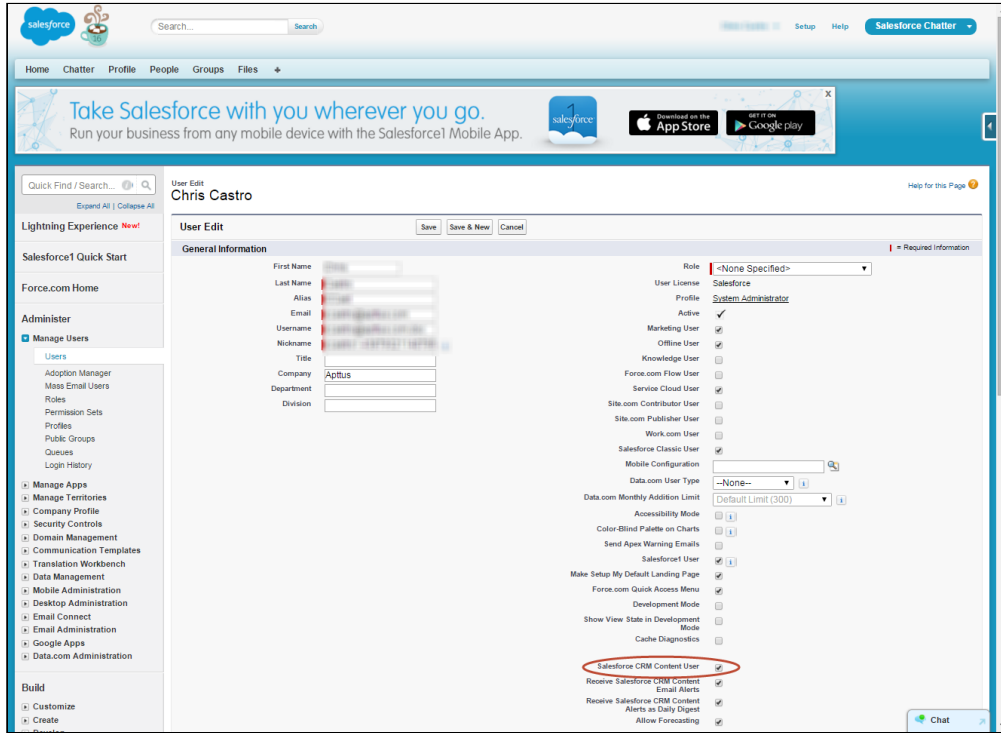
Enable [Edit](#)

- Content Deliveries feature can be enabled for users [i](#)
- Public Links can be enabled for users (Requires Content Deliveries) [i](#)
- Content Deliveries and Public Links can be enabled to let communities users share files managed by libraries (Requires Content Deliveries) [i](#)

Choose password defaults

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

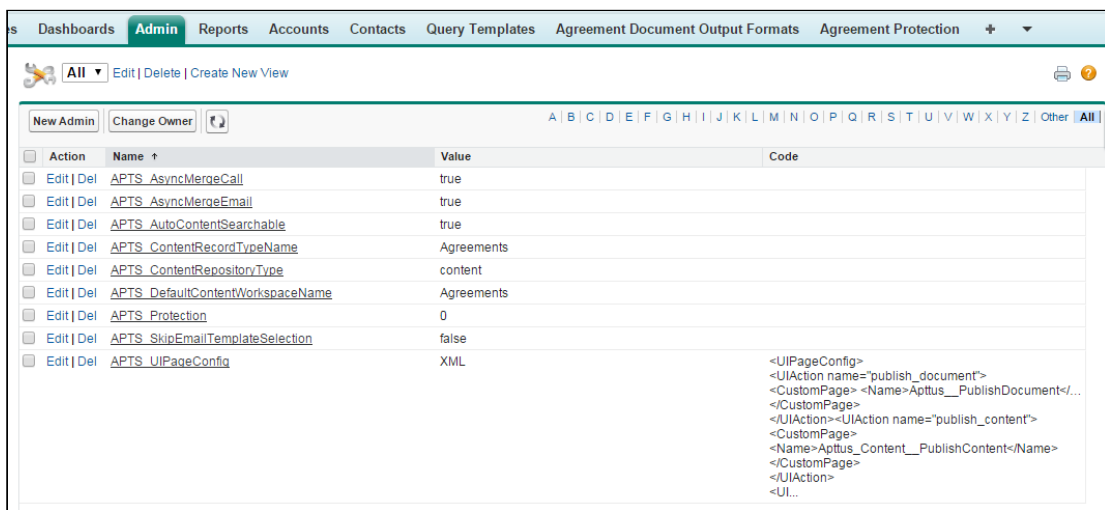
7. Users who are activating agreements must also have Salesforce CRM Content enabled. Turn on Salesforce CRM Content for all users who will be activating or managing agreement documents published to your content libraries. Go to **Setup > Administer > Manage Users > Users**.



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:

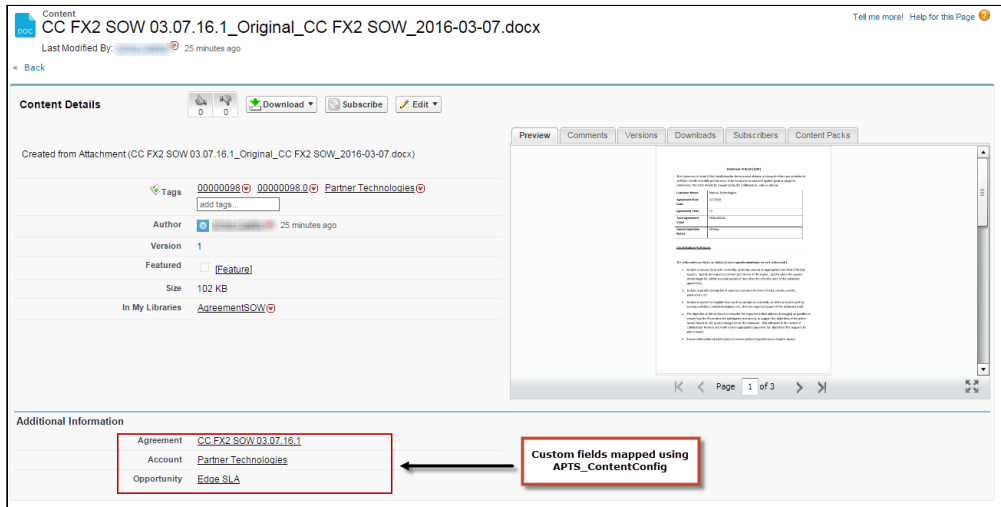
The screenshot shows the 'Admin Detail' for the object 'APTS_ContentConfig'. The XML code is as follows:

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

Annotations in the image include:

- Default mapping**: Points to the first FieldMapping (Id to Agreement__c).
- Mapping Account Field**: Points to the second FieldMapping (Apttus__Account__c to Account__c).
- Mapping Opportunity Field**: Points to the third FieldMapping (Apttus__Related_Opportunity__c to Opportunity__c).
- FromField = Agreement Field ToField = Content Version Field**: A general note pointing to the FromField and ToField elements of the second and third mappings.

- 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.

Setup
Library Permissions

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

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

Users who activate agreements will use this permission

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

Adding Custom Fields to the Content Version Object

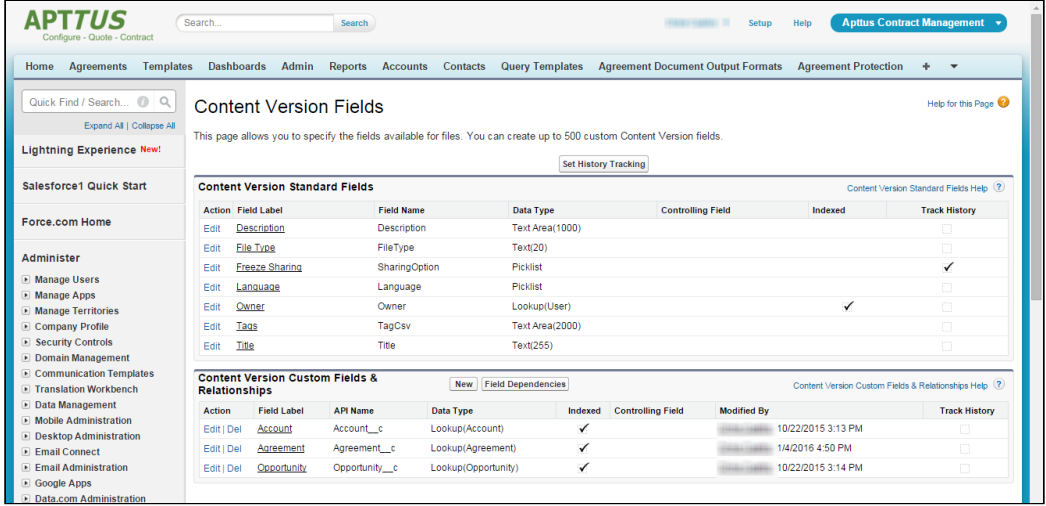
To properly view information and navigate to your contract repository from the Content Versions related list on your Agreements, you must add "Agreement" as a custom lookup field to the Content Version object. The following configuration is required for configuring email agreement documents if you have 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.

i 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.

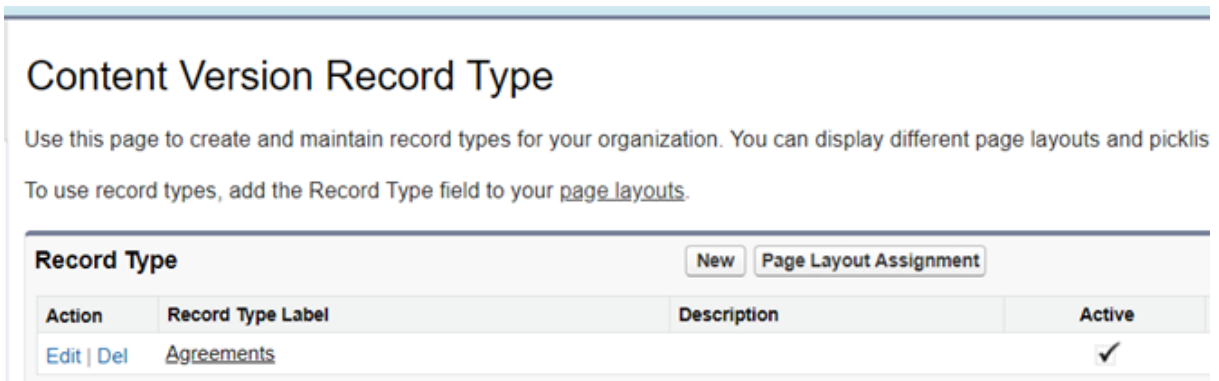
i If you want any custom fields beyond Agreement to map field data from the Agreement record to your content library, you need to configure the optional APTS_ContentConfig Admin object, as detailed in Set Admin Properties.



Assigning Custom Fields to Page Layouts

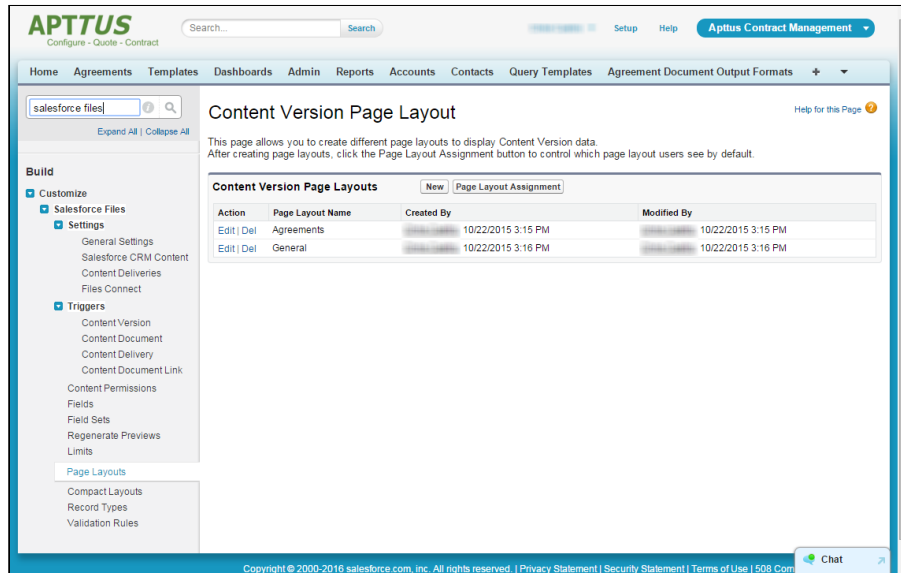
Now that you have created custom fields for your content, you must assign them a page layout. Which page layout is used determines which fields are displayed when for the content you are storing. You can use the pre-existing General layout, or you can create additional layouts to display Content Version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

Edit Page Layout
General [Help for this Page](#)

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

Layout Properties Save Quick Save Cancel

Page Layout Name:

Button Section

- Detail Page Buttons

Fields Edit | Delete

- Agreement
- Account
- Opportunity
- * Title
- Description
- Tags
- Language
- * Owner

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- * Required
- Read-Only
- Dependent Field(s)
- Controller
- Custom S-Control
- Page
- Always Displayed

View:

Content Version Fields [Page 1/1]

- Account
- Agreement
- Description
- File Type
- Language
- Opportunity
- Owner
- Prevent other...
- Tags
- Title

Click and drag Content Version fields to the 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.

- Go to the **Libraries** tab (click + and click **Libraries**).
- From "My Libraries," click **New** to launch the New Library Wizard.

New Library Wizard x

Step 1 of 3: Define Library Information

|= Required Information

| | |
|--------------------|---|
| Name | <input type="text" value="Agreements"/> |
| Unique Name | <input type="text" value="Agreements"/> |
| Description | <input type="text" value="Repository for activated agreement documents"/> |

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 x

Update the tagging rules used in the library. Your selection determines which tags users can add to content.

|= Required Information

| |
|---|
| <input checked="" type="radio"/> Open Tagging Allow authors and editors to enter their own tags. |
| <input type="radio"/> Guided Tagging Allow authors and editors to enter their own tags or choose from suggested tags. |
| <input type="radio"/> Restricted Tagging Allow authors and editors to choose suggested tags only. |

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

Define Library Record Types ✕

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

! = Required Information

Default Record Type: Agreements ▾

Restrict the record types available in the library

Allow content with any record type to be linked to this library

Do not apply record type restrictions to existing content

Available Record Types

add »

«remove

Selected Record Types

General

Agreements

Save Cancel

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:

Add a Library Permission ! = Required Information

Save Cancel

Library Permission Options

Permission Name: Author

Description:

Library Permission Options

| Action | Description |
|--|---|
| <input type="checkbox"/> Manage Library | Users can edit library details and library membership |
| <input checked="" type="checkbox"/> Add Content | Users can publish new content in the library and replace existing content with new versions |
| <input checked="" type="checkbox"/> Add Content on Behalf of Others | Users can choose an author when publishing content in the library |
| <input checked="" type="checkbox"/> Archive Content | Users can archive content in the library |
| <input type="checkbox"/> Delete Content | Users can delete content from the library |
| <input type="checkbox"/> Feature Content | Users can mark content in the library as Featured |
| <input type="checkbox"/> View Comment | Users can view comments on content in the library |
| <input checked="" type="checkbox"/> Add Comment | Users can add comments to content and rate content in the library |
| <input type="checkbox"/> Modify Comments | Users can change comments made by any user in the library |
| <input checked="" type="checkbox"/> Tag Content | Users can add tags to content in the library |
| <input checked="" type="checkbox"/> Deliver Content | Users can deliver content from this library |
| <input checked="" type="checkbox"/> Attach or Share Content | Users can attach or share content from this library to feed posts or comments |
| <input checked="" type="checkbox"/> Organize File and Content Folder | Users can organize files and content folders in the library |

Save Cancel

- Click the **Edit** action for the **Viewer** Library Permission Name. Ensure that the following permissions are selected:

Add a Library Permission Save Cancel ! = Required Information

Library Permission Options

Permission Name

Description

Library Permission Options

| Action | Description |
|---|---|
| <input type="checkbox"/> Manage Library | Users can edit library details and library membership |
| <input type="checkbox"/> Add Content | Users can publish new content in the library and replace existing content with new versions |
| <input type="checkbox"/> Add Content on Behalf of Others | Users can choose an author when publishing content in the library |
| <input type="checkbox"/> Archive Content | Users can archive content in the library |
| <input type="checkbox"/> Delete Content | Users can delete content from the library |
| <input type="checkbox"/> Feature Content | Users can mark content in the library as Featured |
| <input checked="" type="checkbox"/> View Comment | Users can view comments on content in the library |
| <input checked="" type="checkbox"/> Add Comment | Users can add comments to content and rate content in the library |
| <input type="checkbox"/> Modify Comments | Users can change comments made by any user in the library |
| <input type="checkbox"/> Tag Content | Users can add tags to content in the library |
| <input type="checkbox"/> Deliver Content | Users can deliver content from this library |
| <input checked="" type="checkbox"/> Attach or Share Content | Users can attach or share content from this library to feed posts or comments |
| <input type="checkbox"/> Organize File and Content Folder | Users can organize files and content folders in the library |

Save Cancel

- Click the **Edit** action for the **Library Administrator** Library Permission Name. Ensure that the following permissions are selected:

Add a Library Permission Save Cancel ! = Required Information

Library Permission Options

Permission Name

Description

Library Permission Options

| Action | Description |
|--|---|
| <input checked="" type="checkbox"/> Manage Library | Users can edit library details and library membership |
| <input checked="" type="checkbox"/> Add Content | Users can publish new content in the library and replace existing content with new versions |
| <input checked="" type="checkbox"/> Add Content on Behalf of Others | Users can choose an author when publishing content in the library |
| <input checked="" type="checkbox"/> Archive Content | Users can archive content in the library |
| <input type="checkbox"/> Delete Content | Users can delete content from the library |
| <input type="checkbox"/> Feature Content | Users can mark content in the library as Featured |
| <input type="checkbox"/> View Comment | Users can view comments on content in the library |
| <input checked="" type="checkbox"/> Add Comment | Users can add comments to content and rate content in the library |
| <input type="checkbox"/> Modify Comments | Users can change comments made by any user in the library |
| <input checked="" type="checkbox"/> Tag Content | Users can add tags to content in the library |
| <input checked="" type="checkbox"/> Deliver Content | Users can deliver content from this library |
| <input checked="" type="checkbox"/> Attach or Share Content | Users can attach or share content from this library to feed posts or comments |
| <input checked="" type="checkbox"/> Organize File and Content Folder | Users can organize files and content folders in the library |

Save Cancel

- Go to the Libraries tab.
- From "My Libraries," click on the library name.

7. Click **Edit Members** to choose which members have access to this library.

Edit Library Membership Wizard

Step 1 of 2: Select Library Members
To set the library membership, you can add individual users or public groups.

Library: Agreements
Description: Activated Agreements

Search: Find Clear Use this search box to find a specific user or public group.

Individual Users

add »

« remove

Matt Murdock

Next Cancel

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.

Edit Library Membership Wizard

Step 2 of 2: Assign a Library Permission to Members

| Name | Type | Library Permissions |
|--------------|------|--|
| Matt Murdock | User | Library Administrator Library Administrator Author Viewer |

Save Cancel

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**.

The screenshot shows the 'New Custom Field' configuration page for the Agreement object. It is at Step 1: Choose the field type. The 'Data Type' section has four options: None Selected, Auto Number, Formula (selected), and Roll-Up Summary. Each option has a brief description of its function.

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**.

The screenshot shows the 'New Custom Field' configuration page for the Agreement object, now at Step 2: Choose output type. The 'Field Label' is 'Contract Routing Formula' and the 'Field Name' is 'Contract_Routing_Formula'. Under the 'Formula Return Type' section, the 'Text' option is selected. The page provides examples for various return types like Boolean, Currency, Date, etc.

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

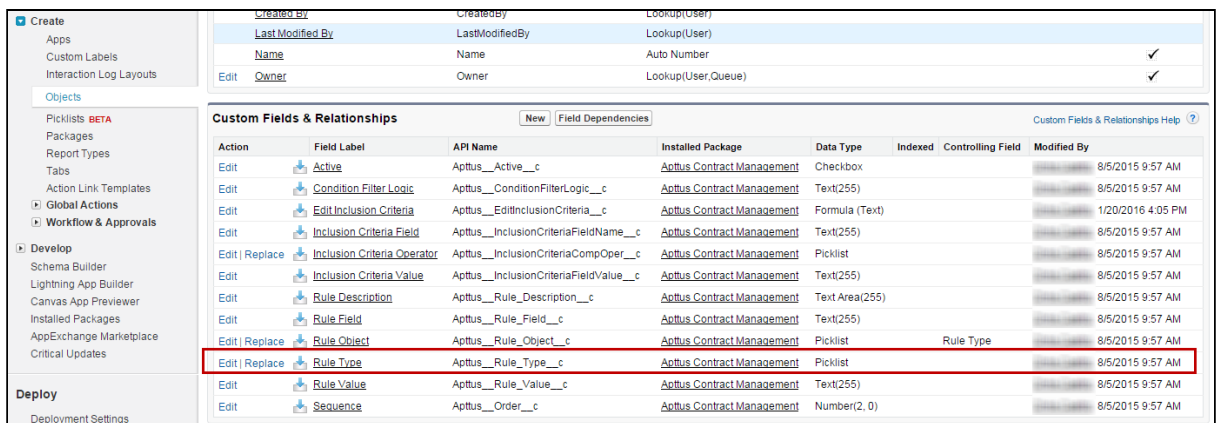


- Make the formula available to the appropriate user profiles and available to page layouts as needed and click **Save** in the final step.

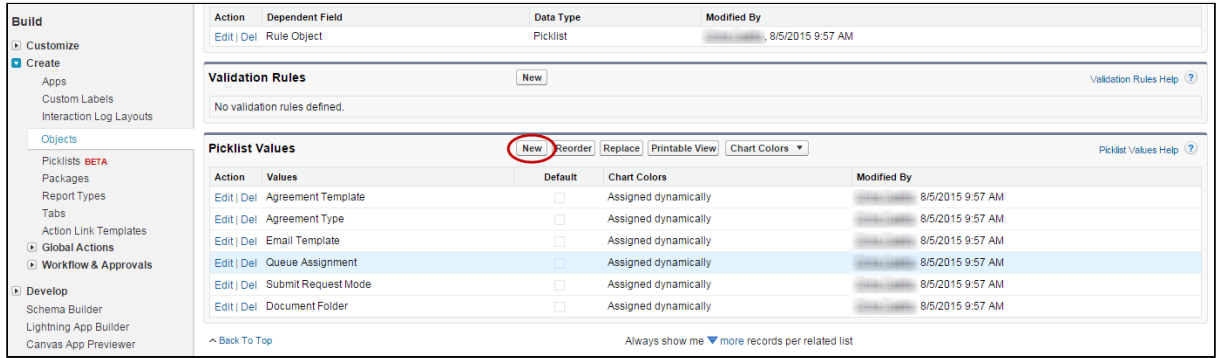
Extending the Agreement Rule Object to Include Content

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.

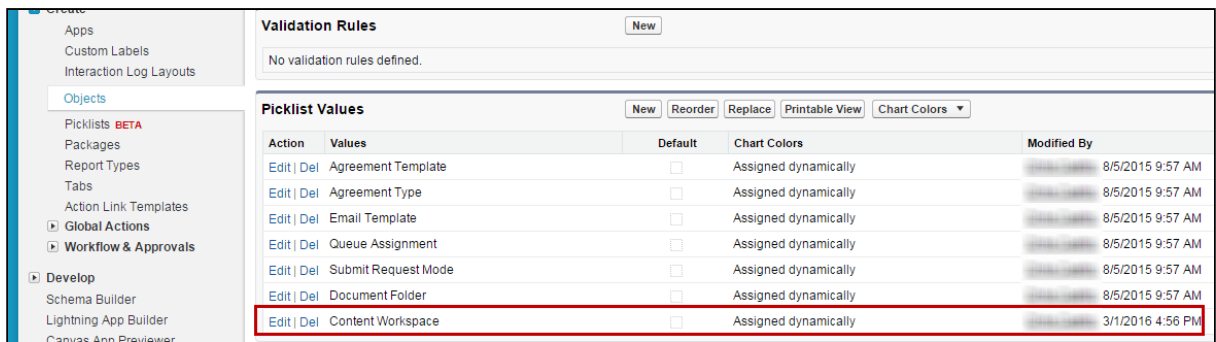
- Go to **Setup > Create > Objects** and click on the **Agreement Rule** object.
- Under Custom Fields & Relationships, click on the **Rule Type** field.



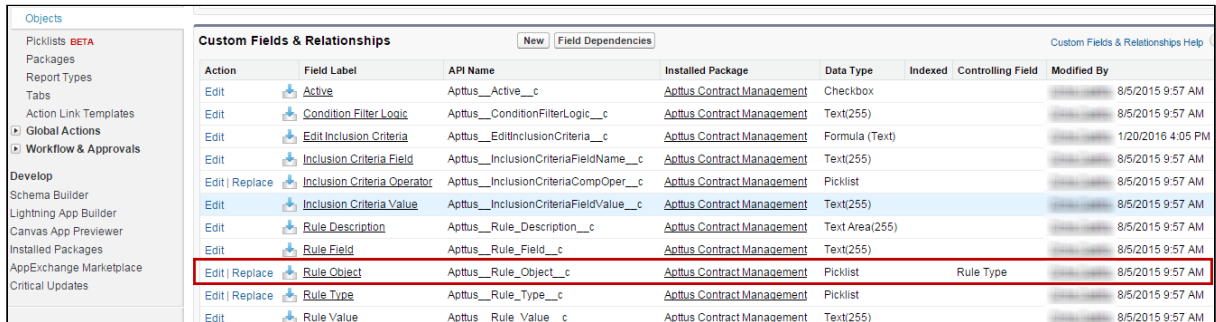
- Scroll down to Picklist Values for the field and click **New**.



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.

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

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

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

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

[Validation Rules](#) (0)

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

Field Information

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

Package Information

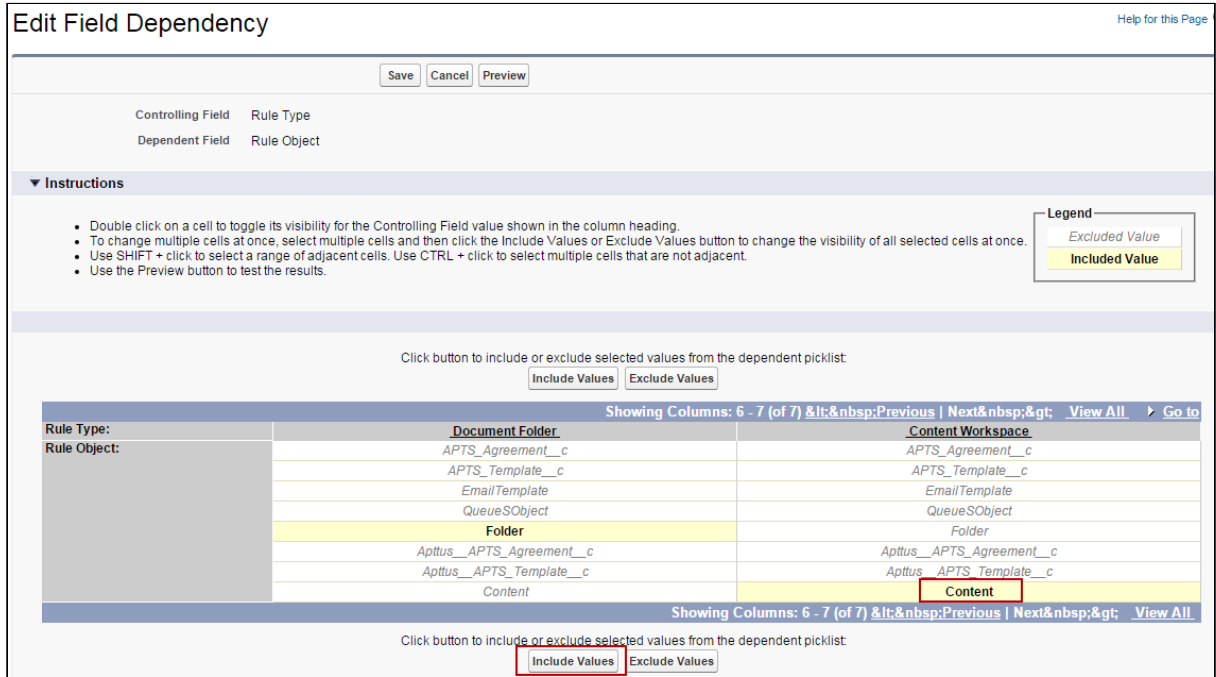
| | | | |
|-------------------|--|-----------------------|-----------------|
| Installed Package | Apttus Contract Management | Available in Versions | 8.277 - Current |
|-------------------|--|-----------------------|-----------------|

Picklist Options

Strictly enforce picklist values

Controlling Field [Rule Type \[Change\]](#)

- Click **Next** to display the last column in the picklist.
- 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.

Agreement Rule
R-0001

Edit Delete Clone

Rule Information

Name R-0001

Sequence 3

Rule Type Content Workspace

Rule Value AgreementSOW

Rule Description To move all documents for records with SOW value for Contract Routing Formula field to Content Agreements library - AgreementSOW

Active

Inclusion Criteria

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

Filter Criteria

| Field | Operator | Value |
|--------------------------|----------|---------|
| Contract Routing Formula | equal to | SOW AND |

Finding Content After Activation

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

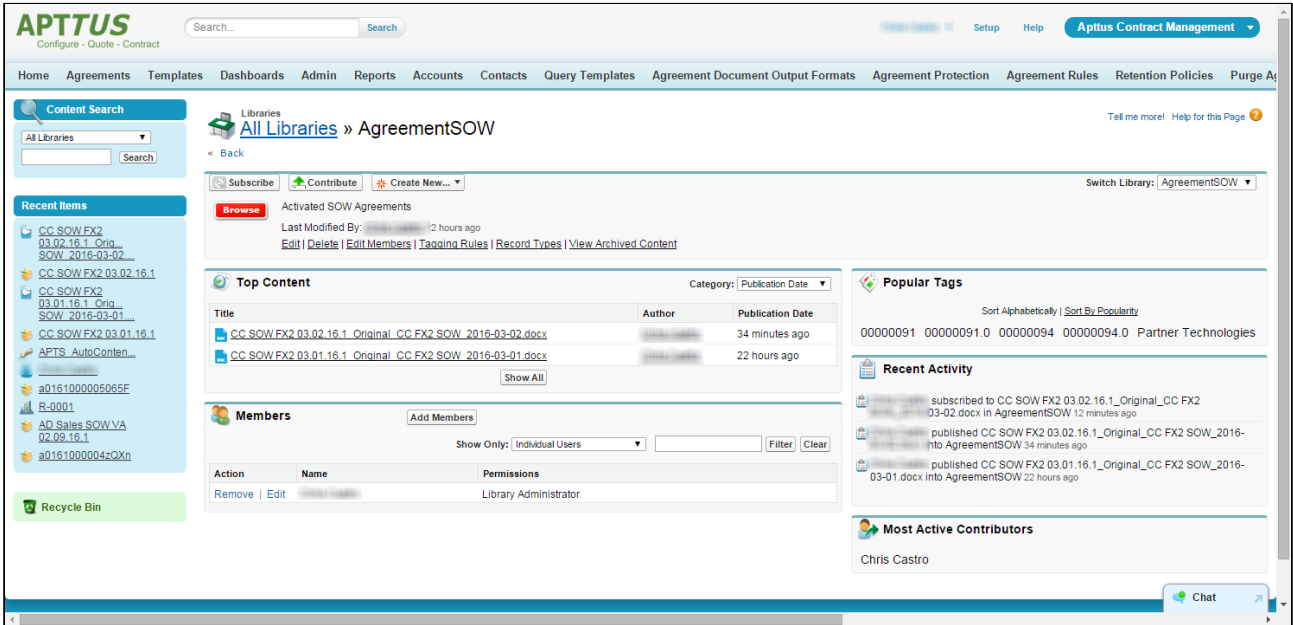
The screenshot shows the APTTUS interface with the 'Libraries Overview' page. The 'My Libraries' section lists two libraries: 'Agreements' (Activated Agreements) and 'AgreementSOW' (Activated SOW Agreements). The 'Top Content' table shows the following data:

| Title | Author | Publication Date |
|---|------------|------------------|
| CC SOW FX2 03.02.16.1 Original_CC FX2 SOW_2016-03-02.docx | [Redacted] | 32 minutes ago |
| CC SOW FX2 03.01.16.1 Original_CC FX2 SOW_2016-03-01.docx | [Redacted] | 22 hours ago |

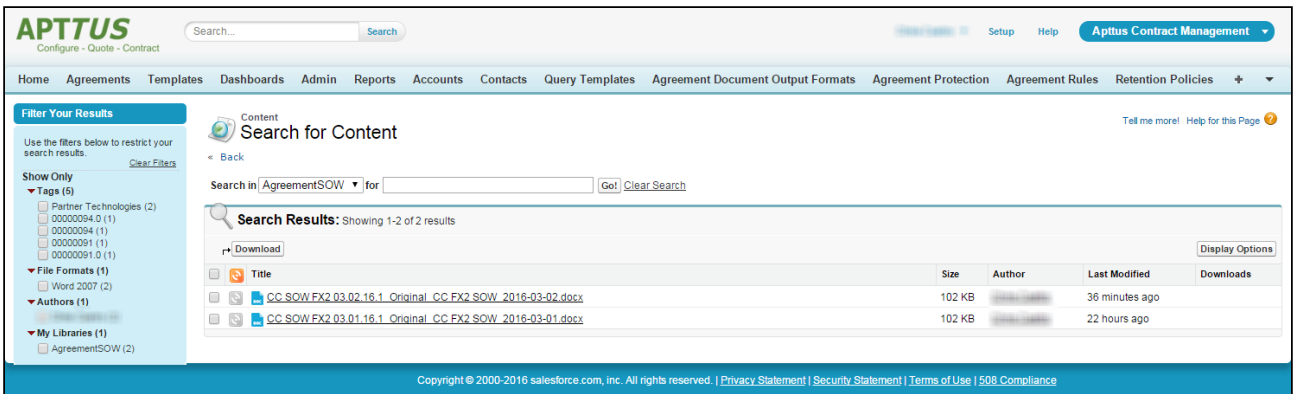
The 'Recent Activity' section shows the following activity:

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

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).

Agreement Detail

Agreement Number: 00000094.0
 Agreement Name: CC SOW FX2 03.02.16.1
 Account: Partner Technologies
 Related Opportunity: Edge SLA
 Total Agreement Value: \$500,000.00
 Description: [Blank]
 Special Terms: [Blank]
 Business Hours: [Blank]
 Service Level: [Blank]

Record Type: SOW [Change]
 Agreement Category: [Blank]
 Status Category: In Effect
Status: Activated
 Subtype: [Blank]
 Parent Agreement: [Blank]
 Primary Contact: Bertrand Roberts
 Requestor: [Blank]
 Owner: [Blank]

Contract Routing Formula: SOW

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

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

CC SOW FX2 03.02.16.1_Original_CC.FX2 SOW_2016-03-02.docx

Download docx (102 KB)
 File Sharing Settings

Last Modified Today at 2:58 PM

Version 1
 Show all versions
 Show file report

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

Privately Shared

Go to Content Detail Page | Help for this Page

Followers: No followers.


Shared With: AgreementSOW

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.


 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)

 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/congacim/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.

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 |
|---|--|---|
| <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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

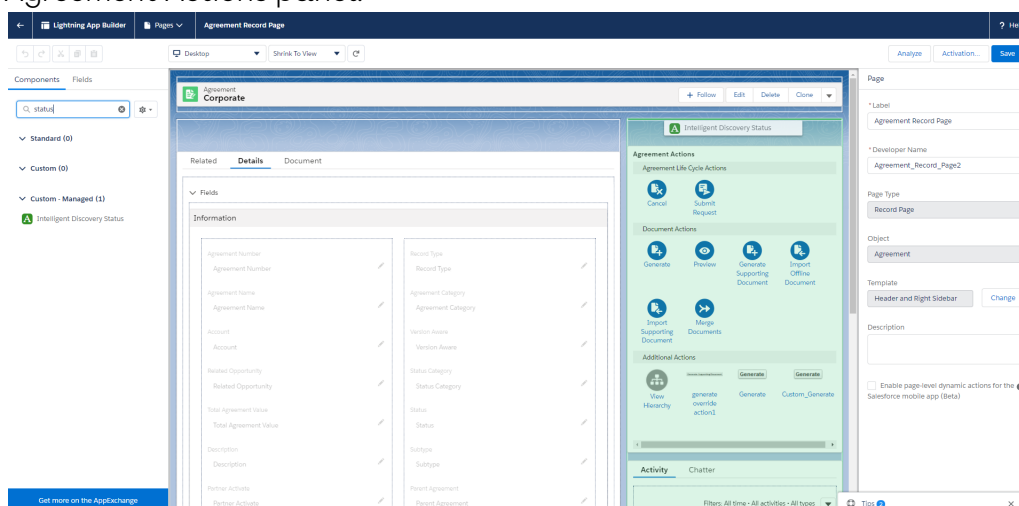
You must configure the intelligent discovery status panel in lightning to view intelligent discovery processing status.

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

i 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

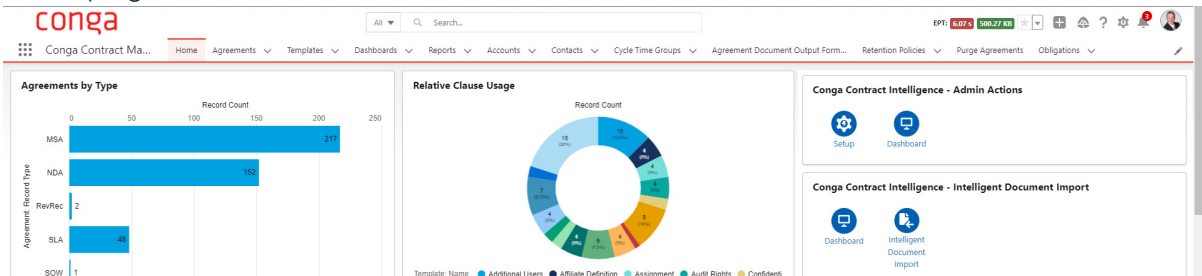
1. Navigate to the Home page.
2. Click the **Setup** icon and select the **Edit Page** option.

- In the Components search box, enter `CCIAdminContainer`.
- Drag and drop the CCIAdminContainer component at any position on the Home page.

i You must set component visibility for the CCIAdminContainer component only for administrators.

- In the Components search box, enter CCIUserContainer.
- Drag and drop the CCIUserContainer component at any position on the Home page.
- 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

- Navigate to the Agreement Detail page.
- Click the **Setup** icon and select the **Edit Page** option.
- In the Components search box, enter `CCIUserContainer`.
- Drag and drop the CCIUserContainer component at any position on the Agreement Detail page.
- Click **Save**.

The following screenshot shows the CCI widget (Conga Contract Intelligence - Document Actions) on the Agreement Detail page.

The screenshot displays the Conga Contract Management (CLM) user interface. At the top, the Conga logo is visible on the left, and a search bar is in the center. The right side of the header shows the user's profile and various system icons. Below the header, the main content area is titled 'Agreement CCI'. It features a table with columns for Agreement Number (00001974.0), Account (Portal Account), Agreement Start Date (3/25/2022), Agreement End Date (3/22/2052), Approval Status (Not Submitted), and Owner (Venky Naganathan). Below this table is a navigation bar with tabs for Request, In Authoring, In Signatures, In Filing, In Effect, Expired, Terminated, Amended, Cancelled, Import, and Custom Value. A red button labeled 'Mark Status Category as Complete' is also present. The main content area is divided into two sections: 'Details' and 'Documents'. The 'Details' section includes a 'Related List Quick Links' area with various filters and a table of agreement details. The 'Documents' section includes 'Agreement Lifecycle Actions' and 'Document Actions'.

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 |
|--|---|--|
| <ul style="list-style-type: none"> • You can search a subset of Agreement objects and fields and use wildcards and filters to refine your search. • Sidebar search depends on the following: <ul style="list-style-type: none"> • Search options Sidebar search searches only a subset of records and fields. If the sidebar search drop-down list is available, you can limit your search to only tags or the records for a single object. If the sidebar search Limit to items I own 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 with agreement_1 in a single string. | <ul style="list-style-type: none"> • 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. | <ul style="list-style-type: none"> • Global search finds more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. Global search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments. 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 |
|---|-----------------|---|
| <ul style="list-style-type: none"> • 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. | | <ul style="list-style-type: none"> • 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(Apptus__Status_Category__c,"In Signatures"),
ISPICKVAL(Apptus__Status_Category__c,"In Filing"),
AND(ISPICKVAL(Apptus__Status_Category__c,"In
Authoring"),ISPICKVAL(Apptus__Source__c,"Other Party Paper"))),
IF(OR($User.UIThemeDisplayed == 'Theme4d', $User.UIThemeDisplayed == 'Theme4t')
, HYPERLINK("/apex/Apptus__LightningAgreementActivate?id=" &Id, IMAGE("/
resource/Apptus__Button_Activate", "Activate"), "_self") , HYPERLINK("/apex/
Apptus__AgreementActivate?id=" &Id, IMAGE("/resource/Apptus__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 | <p>Required to retain the name of the imported document in the merged document.</p> <p>When a parallel review ends for an imported document, the reviewed document is merged with the latest reviewed document.</p> |
| APTS_EmailTemplateForReviewSignatures or APTS_EmailTemplateForReview | <p>Required to configure default email template to send documents for review.</p> <p>If the admin entries (APTS_EmailTemplateForReviewSignatures or APTS_EmailTemplateForReview) are not configured, the default email template is set to the template provided by Conga.</p> <p>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."</p> |
| 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 . |
| <p>The following email templates can be customized for the review cycle notifications.</p> <ul style="list-style-type: none"> • 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 | <p>Required to apply protection to the documents being sent for review.</p> <p>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.</p> <p>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.</p> |
| 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
00000AKhjOAAAT,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**.


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: AptsEndReviewByEmail 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
 - XAJIS End Point
 - Enable Document Versioning
- Configure the following [admin entries](#):
 - APTS_Protection
 - APTS_Password
 - APTS_RetainFileNameForParallelReviewMergedDocument

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

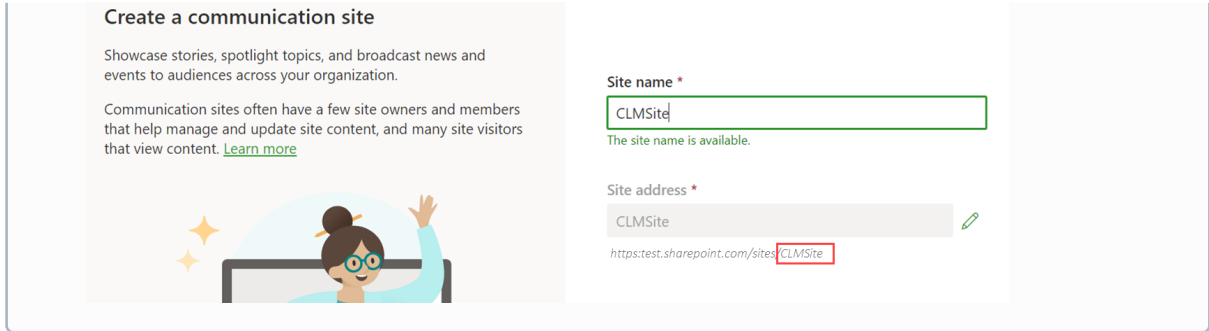
To configure application permission flow

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 Tenant 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`

i 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`

i 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.

i 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 |
|---|----------|----------------|--|--|
| <p>The admin entry is not configured, deleted, invalid, or blank.</p> <div data-bbox="169 707 571 869" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> The content repository type is considered Document.</p> </div> | 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.

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

Understanding Document Versions

Contract Document Versioning divides the version of an Agreement document into three parts: Major, Minor, and Revision. Each version of an agreement document is represented as a period-delimited numeric value in the Document Version Details object (e.g., "1.0.0"). Version values are numerically incremented as various actions are taken on the document by different users. The following table describes each version type represented by the version value and how it is created.

| Version Type | Document Action | User Role | Example Value |
|--------------|--|----------------------------|-------------------------|
| Major | <p>A major version type is created every time a user:</p> <ul style="list-style-type: none"> • Generates a document. • Regenerates a document. • Creates an Offline document. • Imports an Offline document. • Generates a supporting document. • Checks in a Clean document or a document without Redlines. • Checks in a document as Final. <p>A MAJOR version can be either a new document instance or an incremented version of a pre-existing document. For further explanation, see New Document Versus Incremented Version</p> | Contract Requestor / Owner | 1.0.0 2.0.0 3.0.0 |

| Version Type | Document Action | User Role | Example Value |
|---------------------|---|------------|-------------------------|
| Minor (Negotiator) | <p>A minor version is created every time a Negotiator makes changes to the document and checks it in using X-Author for Contracts with the following exceptions:</p> <ul style="list-style-type: none"> • The Negotiator checks in the document as Clean or Final (creates a MAJOR version). • The Negotiator checks in a document on behalf of a Reviewer (creates a REVISION—see below). | Negotiator | 1.1.0 2.1.0 1.2.0 |
| Revision (Reviewer) | <p>A revision is created every time a document is returned by a reviewer to the Negotiator. The document is either returned by the reviewer as an email attachment and checked in using the <i>X-Author Contracts for Outlook</i> plug-in, or checked in on their behalf by the Negotiator (for both internal and external reviewers) using <i>X-Author Contracts for Word</i>. For more information on Send for Review using X-Author, see X-Author for Contracts documentation.</p> | 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.

Document Version Properties Edit

[Help for this Page ?](#)

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

Edit Document Version Properties

Document Version Properties Information ! = Required Information

Name ! [i](#)

Trim Document Version ?

Initial Version ?

Document Regenerate


Increment Checkin Final ?

Increment Checkin Without Redlines ?

Increment Checkin With Redlines ?

You can enter following property details in Document Version Properties:

| Setting | Description |
|-----------------|--|
| Initial Version | 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 | <p>This property specifies the document version increment factor when the document is regenerated with the same template as of the original agreement, from Contract Management. Specify Major if you want to increment the major version of the document and specify Minor if you want to increment the minor version of the document. Default value of this field (if left blank) is Major.</p> <div data-bbox="344 555 1426 779" style="border: 1px solid #f9e79f; padding: 10px;"> <p> Note</p> <p>Regenerating an agreement document with a different template than the one used for generating the original agreement, restarts the version numbering of the document.</p> </div> |
| Increment Checkin Final | <p>This property specifies the document version increment factor when the document is checked in as Final- to be signed from X-Author Contracts for Microsoft Word. Specify Major if you want to increment the major version number of the document and specify Minor if you want to increment the minor version number of the document. Default value of this field (if left blank) is Major.</p> |
| Increment Checkin with Redlines | <p>This property specifies the document version increment factor when the document is checked in using the option With Redlines from X-Author Contracts for Microsoft Word. Specify Major if you want to increment the major version number of the document and specify Minor if you want to increment the minor version number of the document. Default value of this field (if left blank) is Minor.</p> |
| Increment Checkin without Redlines | <p>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.</p> |
| Trim Document Version | <p>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.</p> |

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.

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect BETA
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- **Develop**
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution
 - API
 - Components
 - Custom Permissions
 - Custom Settings
 - Email Services
 - Lightning Components
 - Pages
 - S-Controls
 - Sites
 - Static Resources
 - Tools
 - Remote Access
 - External Data Sources
 - External Objects
 - Secure Agents
- Schema Builder
- Lightning App Builder New!

Edit Comply System Properties

Sa

Comply System Properties Information

Name i

Admin User

Agreement Number Field For Imported Docs

Allow PDF Selection Override

Allow Private Selection Override

Allow Reconcile Selection Override

Api User Key (DEPRECATED)

Auto Enable PDF For Final Docs

Auto Enable Private Indicator

Auto Enable Reconciliation

Auto Insert Header Footer Data

Bypass Sharing

Contract Summary Template

Default Opportunity Agreement Owner

4 Document Naming Convention

5 Document Structure FX2 For Imported Docs

Document Versioning Naming Convention (D

Email Template For Checkin Notification

Enable Clause Approvals

2 Enable Document Versioning

Enable Merge Call Debug

Enable Multiple Checkout

Enable PDF Security

Enable Submit Merge Call

1 Enable Version Control

Footer Datetime Format For Imported Docs

Instance Url

Max Child Level

Merge Call Timeout Millis

Merge Webservice Endpoint

PDF Owner Password


Publish Author Events

Publish Merge Events

3 Use Agreement Locks for Versioning

4. Configure the System Properties described in the following table.

| # | Property | Description |
|---|------------------------------------|--|
| 1 | Enable Version Control | <p>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.</p> |
| 2 | Enable Document Versioning | <p>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.</p> <p>Enabling Document Versioning changes the value of the Version Aware Agreement field to TRUE for all new agreements after the property is activated. The Version Aware field is a flag that tells Conga CLM to use Document Versioning for a specific record.</p> <p>Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created (see the section on Workflow Rules below.)</p> <p>To enable/disable Document Versioning for specific Agreement records, see To add the Version Aware field to Agreement Layouts.</p> |
| 3 | Use Agreement Locks for Versioning | <p>Check this box to use Agreement locks for versioning instead of document-level locking:</p> <ul style="list-style-type: none"> • If enabled, all agreement documents are locked (by the user checking out) when 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 | <p>Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events.</p> <p>The following attributes permitted when formulating a document naming convention are:</p> <ul style="list-style-type: none"> • %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% • Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object. <p>If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp%</p> <p>Example agreement document name using the default naming convention: <i>SOW_Regenerated_SOW ABC_2015-08-07</i></p> |
| 5 | Document Structure FX2 For Imported Docs | <p>Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author.</p> </div> |

To add document version in document naming convention

You can append the document version to the document name by leveraging the `%version%` attribute of the document naming convention property. To configure this:

1. Navigate to Setup > Develop > Custom Settings > and click **Manage** link next to **Comply System Properties**.
2. Click **Edit**.
3. Configure the document naming convention field value as:
`:%Name%_%templatename%_%timestamp%_%version%`
4. Click **Save**.

An example agreement document name using above setting would be: *Apttus NDA_NDA_2017-05-14_1.0.0*. Here the '1.0.0' appended at the end refers to the document version.

i If you have configured `%version%` attribute in the Document Naming Convention property but the Enable Document Versioning property is disabled, the agreement document name shall contain an empty string in place of the version attribute. For example- If you have configured Document Naming Convention field as `:%Name%_%templatename%_%timestamp%_%version%`, but you have disabled Enable Document Versioning property, the generated sample agreement name shall be *Apttus NDA_NDA_2017-05-14*.

i To trim the third decimal and number from the document version attribute in the Document Naming Convention property, select **Trim Document Version** checkbox in Document Version Properties. For more details on Trim Document Version, refer to [Document Version Properties](#).

To add Version-Related Merge Event Actions

For Document Versioning to work properly, the picklist values for the Merge Event Action must be updated.

1. Navigate to Setup > Create > Objects > Merge Event.
2. Go to the **Action** Custom Field.
3. Add the following two values to the picklist:
 - Check Out


- Revert Check Out

After adding values, your Merge Action picklist should appear as shown in the following image:

| Picklist Values | |
|-----------------|------------------------------|
| Action | Values |
| Edit Del | Preview |
| Edit Del | Generate |
| Edit Del | Generate Supporting Document |
| Edit Del | Regenerate |
| Edit Del | Check Out |
| Edit Del | Revert Check Out |
| Edit Del | Check In |
| Edit Del | Create Offline Agreement |
| Edit Del | Import Offline Agreement |

To add the Document Version Related List to Agreement Layouts

To view Document Version details for your agreement documents, the **Document Version** Related List must be added to your Agreement Page Layouts. To add the Related List to your page layouts, refer to Salesforce documentation for [Edit Page Layouts for Custom Objects](#).

 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](#).

i The Version Aware field is included in the default Agreement Layout included with the Apttus Contract Management package.

To make Agreements Version Aware using Workflow Rules

You can create one or more Workflow Rules to set the Version Aware flag value in certain records based on the value of other record fields.

1. Create a new **Workflow Rule** for Document Versioning. See the section on [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."

| | |
|--|--|
| Specify the workflow actions that will be triggered when the rule criteria are met. See an example | |
| Rule Criteria | Agreement: Version Number GREATER THAN 0 |
| Evaluation Criteria | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |

2. Specify your Workflow Rule Action to make the Version Aware flag *false* when the criteria are met.

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**.

i You can do this more quickly for multiple profiles by going to **Setup > Build > Develop > Visualforce Pages** and changing the **Security** for the Document Finder Visualforce page.

Add Document Finder to the Agreement Layout

As Document Finder is a custom Visualforce page, it must be added to the Agreement layout inside of a section.

1. Go to **Setup > Create > Objects > Agreements**.
2. Hover over Page Layouts and click **Edit** next to the layout you want to modify. In this example, 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 field that you need to update.
 - c. Select the object for the associated field to update and click **Next**.
 - d. To re-evaluate the workflow rules on the selected object after the field update is done, select the **Re-evaluate Workflow Rules After Field Change** check box.
 - e. Under the Specify New Field Value section, select an appropriate options from the list of available options based on the Field to Update selection.
 - f. Click **Save**.

Validating Workflows

After creating a new workflow rule, you must validate the workflow. Once validated, you will receive a confirmation email.

To validate a workflow

1. Navigate to the **Agreements** tab and click **New**.
2. Select a record type for the new agreement and click **Continue**.
3. Type a mandatory **Agreement Name** and enter a mandatory **Account**.
4. From **Select Category**, select *In Effect*. Based on your selection from the **Select Category**, the **Status** pick list is auto-populated.
5. From **Status**, select *Activated*.
6. Click **Save**.

This saves the edited values and triggers the workflow. If your email is set for the Owner of the agreement type, you will receive an email.

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

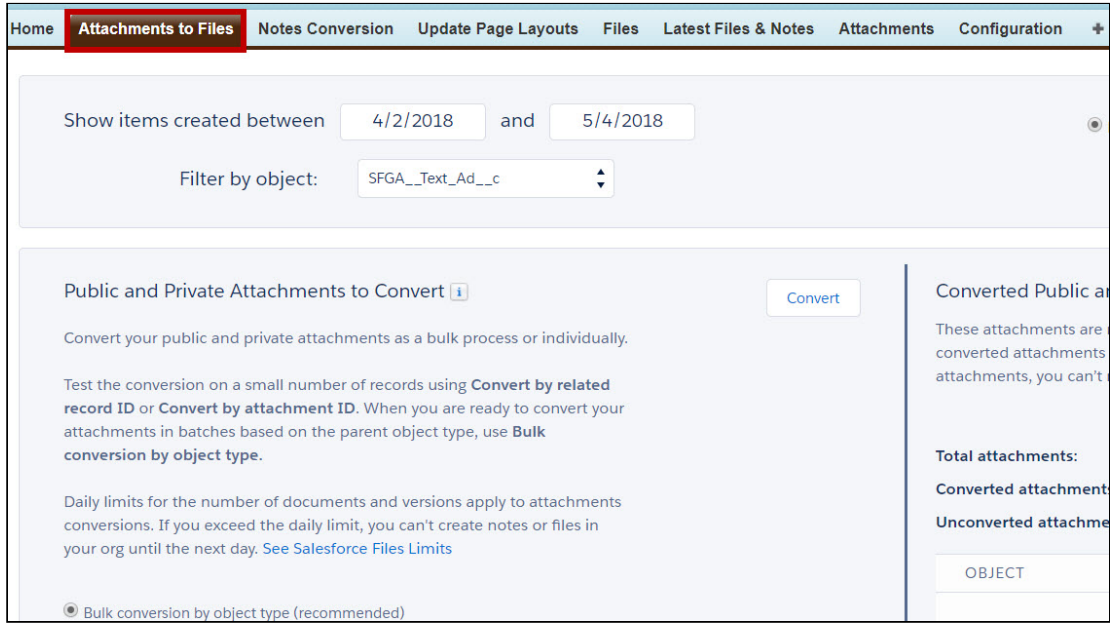
The migration process has the following limitations:

- 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

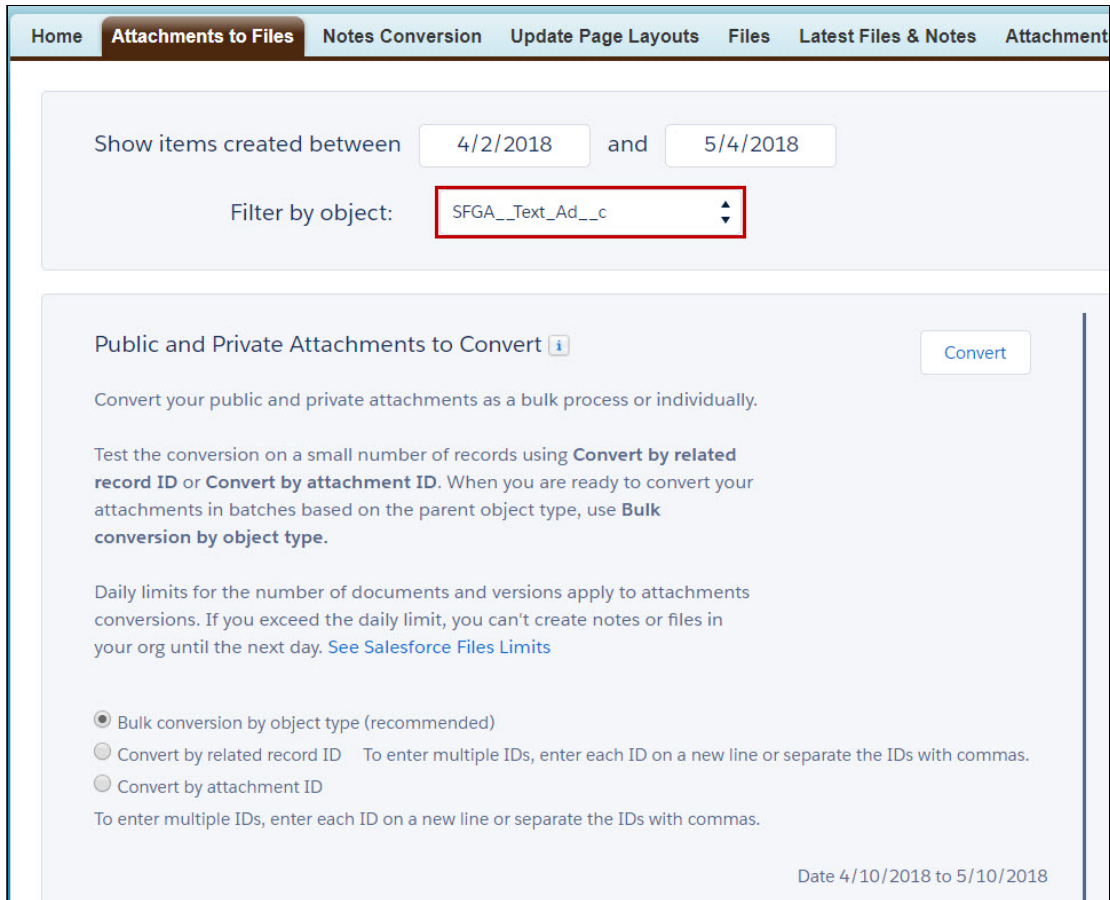
1. Go to the [Salesforce.com](https://salesforce.com) App Menu and select **Attachments and Notes migrator**.
2. Click **Attachments to Files**. The Attachments to Files page appears.

Figure: Attachments to Files Page



- 3. Select the required object from the **Filter by object** drop-down list as shown in the below figure.

Figure: Filter by object



- 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

Bulk conversion by object type (recommended)
 Convert by related record ID To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.
 Convert by attachment ID
 To enter multiple IDs, enter each ID on a new line or separate the IDs with commas.

Date 4/10/2018 to 5/10/2018

| <input checked="" type="checkbox"/> | OBJECT | QUANTITY | APPROX SIZE (MB) | TO CONVERT |
|-------------------------------------|----------------------------------|----------|------------------|----------------------------------|
| <input checked="" type="checkbox"/> | Apttus__APTS_Agreement__c | 93 | 10 | <input type="text" value="93"/> |
| <input checked="" type="checkbox"/> | Apttus__APTS_Template__c | 11 | 1 | <input type="text" value="11"/> |
| <input checked="" type="checkbox"/> | Apttus__TemplateVersion__c | 18 | 1 | <input type="text" value="18"/> |
| <input checked="" type="checkbox"/> | Apttus__TempObject__c | 1 | 1 | <input type="text" value="1"/> |
| <input checked="" type="checkbox"/> | Apttus__WizardRuntimeInput__c | 4 | 1 | <input type="text" value="4"/> |
| <input checked="" type="checkbox"/> | echosign_dev1__SIGN_Agreement__c | 121 | 9 | <input type="text" value="121"/> |

[Previous](#) [Next](#)

Total to convert: 248

You can also convert attachments to files by selecting the followings:

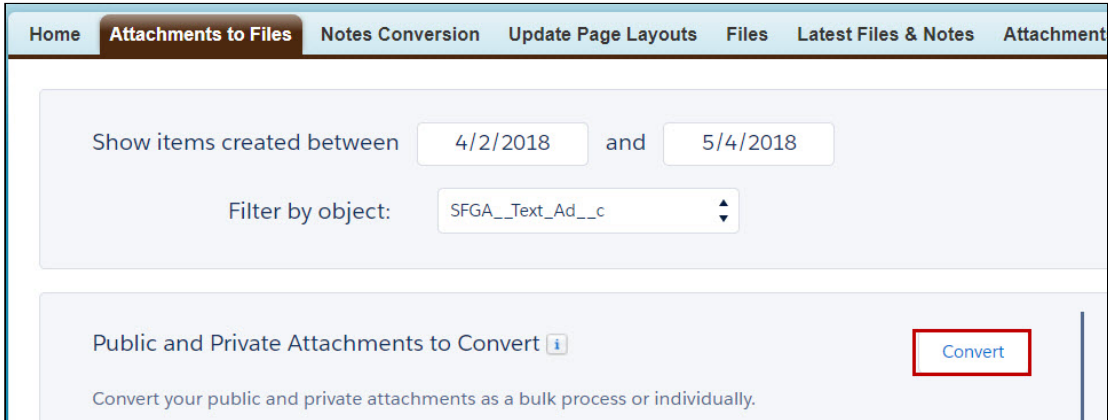
| | |
|-------------------------------------|--|
| Convert by related record ID | You can convert attachments using Record ID . Users can enter multiple IDs separated by commas or each ID in a separate line. |
| Convert by attachment ID | You can convert attachments using Attachment ID . Users can enter multiple IDs separated by commas or each ID in a separate line. |

Note

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

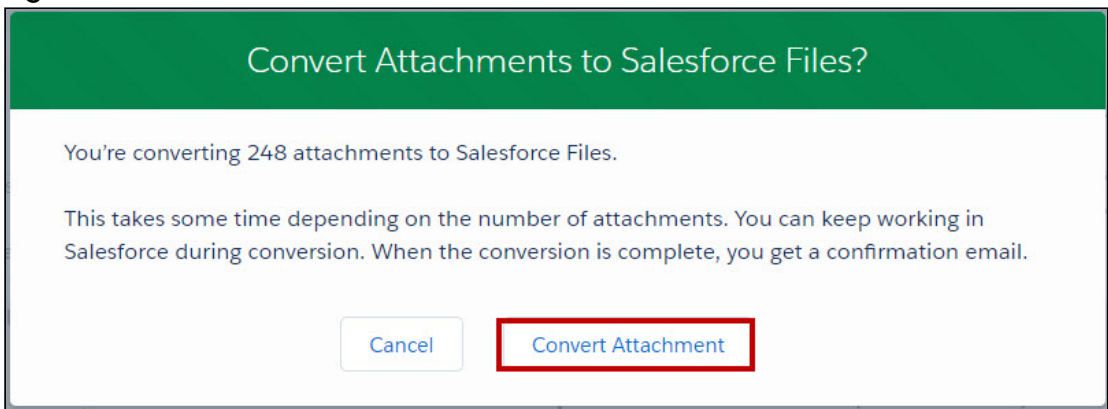
- Click **Convert**.

Figure: Convert



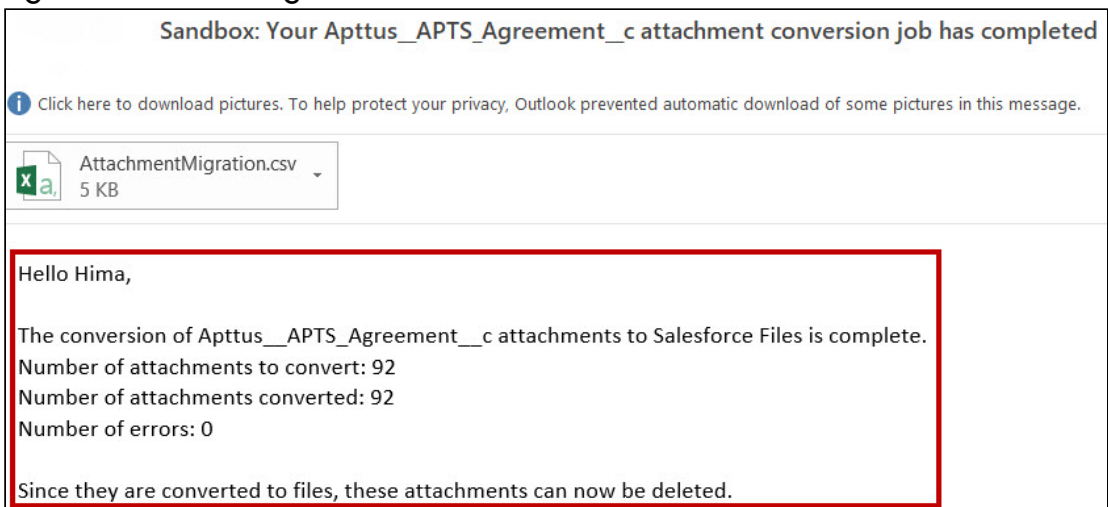
A pop-up appears displaying the below message as shown in the below figure.

Figure: Convert Attachment



6. Click **Convert Attachment** to convert the attachments or click **Cancel** to cancel the conversion.
7. After attachments are converted to files, you will get an email which displays a message as highlighted in the below figure.

Figure: Email Message



The conversion of attachments to files is completed.

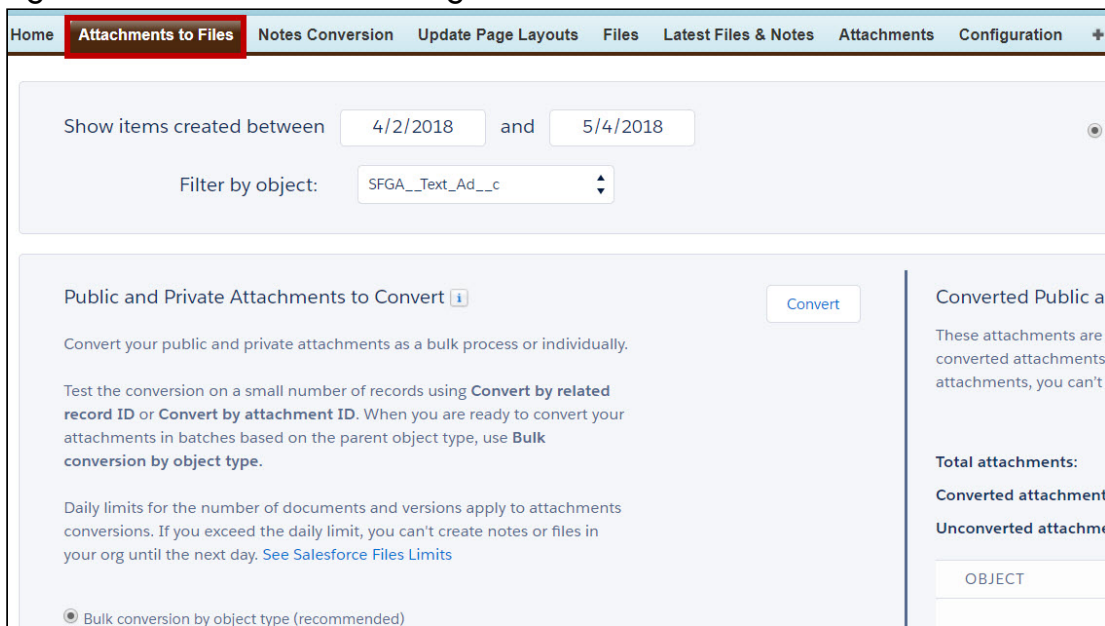
Deleting Attachments

Delete attachments option enables 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.

Converted Public and Private Attachments Refresh

These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.

Date 4/11/2018 to 5/11/2018

Total attachments: 256
Converted attachments(can be deleted): 106
Unconverted attachments: 150

| OBJECT | QUANTITY | APPROX SIZE (MB) | |
|---------------------------|----------|------------------|---|
| Apttus__APTS_Agreement__c | 92 | 10 |  |
| Apttus__APTS_Template__c | 14 | 1 |  |

4. Converted attachments appear with details as shown in the below figure.



Figure: Converted Attachments with Details

Converted Public and Private Attachments Refresh

These attachments are now available in your org as Salesforce Files. Delete these converted attachments to free up storage space. After you delete converted attachments, you can't recover them.

Date 4/11/2018 to 5/11/2018

Total attachments: 256
Converted attachments(can be deleted): 106
Unconverted attachments: 150

| OBJECT | QUANTITY | APPROX SIZE (MB) | |
|---------------------------|----------|------------------|---|
| Apttus__APTS_Agreement__c | 92 | 10 |  |
| Apttus__APTS_Template__c | 14 | 1 |  |

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

Delete converted attachments?

You're deleting all converted attachments for Apttus__APTS_Agreement__c.

Cancel Delete

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.

i When using Agreement Document Protection, inserting a clause via the Playbook will not be tracked as a redline in the document. However, when the document is checked in and reconciled, the added clause will be tracked via the Agreement Clauses related list.

Defining Protection Password

Create a custom object record to define password protection for your document.

To define protection password

1. Click **+** and click **Admin**.
2. Click **New** and type APTS_Password in the **Name** field.
3. In the **Value** field, enter the password that you want to set to protect the document and click **Save**.


A new APTS_Password custom object record is created with the password that you entered as its value.

Setting Up Agreement Protection

To restrict what specific profiles can and cannot do with generated documents, you can protect it either by making it read-only or enabling track changes to capture any updates on the generated document.


For example, specify a Sales User who can generate or re-generate a document but when editing or forwarding it to a customer, track changes are enabled.

When the protection levels are setup at for different actions, the document is protected according to the protection type and the specified level.

 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.

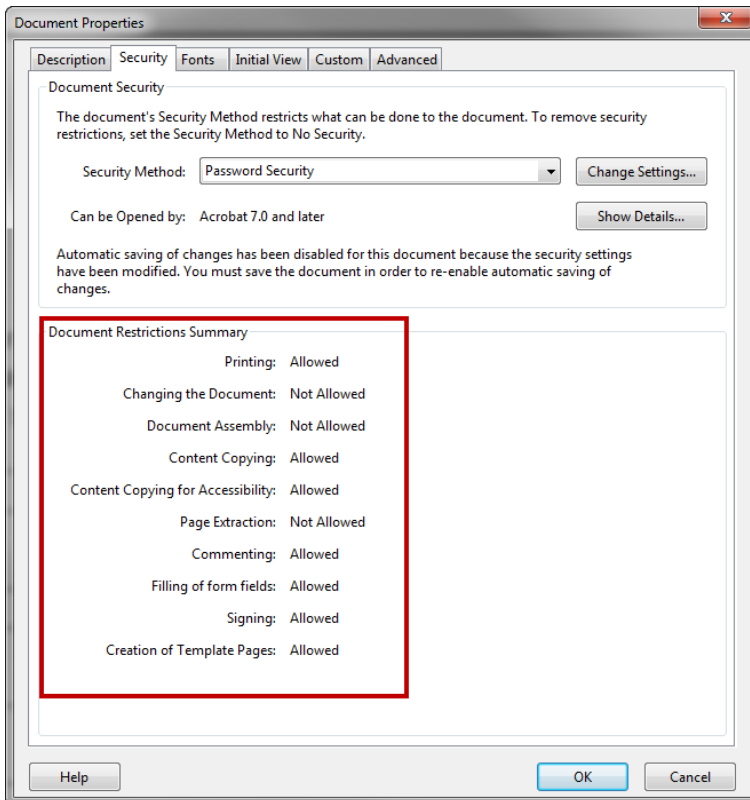
PDF Security for Agreement Documents

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 use 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**.

Retention Policy Edit
test

Edit Policy Specification Ok Cancel

Filter

| | Field | Operator | Value | |
|----|----------------|----------|-------|-----|
| 1. | Business Hours | equal to | 1 | |
| 2. | Account | equal to | abc | Del |

[Add Row](#) [Remove Row](#)

[Clear Advanced Options](#)

Advanced Filter Condition:
1 AND 2

Rule

Retain Forever

Period Years

After Date Termination Date

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.

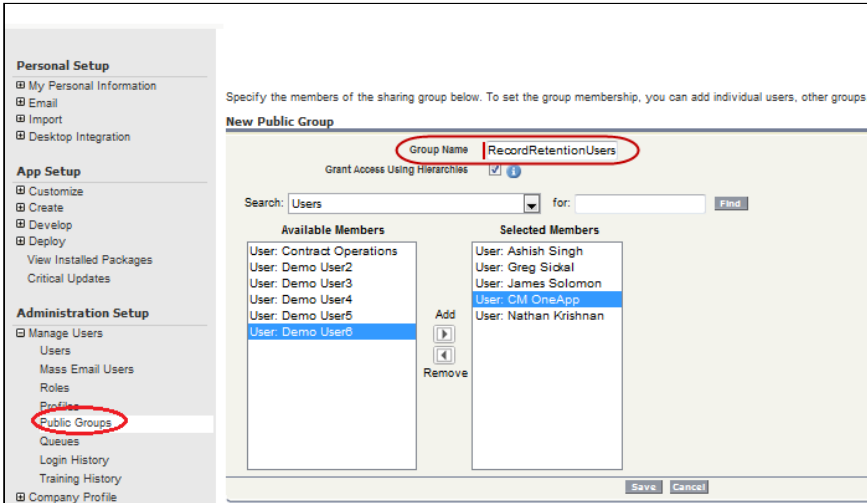
1. Click **Setup** > **Develop** > **Apex Classes** > **Schedule Apex**.
2. Enter the following information to configure the job parameters.
 - a. **Job Name:** Retention Calc Job
 - b. **Apex Class:** `RetentionDateCalcJobScheduler`
 - c. **Frequency:** Specify how often the Apex class is to run:
 - 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 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:

- **Wizard Designs** – Use this tab to create new Wizard designs or edit existing Wizard designs. You assemble Wizards using the Wizard Designer tool, adding **Inputs** and **Steps** from the Wizard Component Library or creating instances for use with specific designs. You can design rules for your Inputs based on criteria or values from other

Inputs, configure the flow for your Steps by creating and organizing Wizard Steps rules, and preview Steps and Inputs as needed while finalizing the Wizard Design. When you are finished with a design, you can activate it for use from the Wizards tab.

The screenshot displays the 'Wizard Designer' interface. The main window is titled 'Create Basic Agreement' and has tabs for 'Wizard Settings' and 'Wizard Step Rules'. The 'Wizard Settings' tab is active, showing fields for Design Name, Description, Keywords, Category, and Sub Category. The 'Wizard Step Rules' tab is also visible, showing fields for Wizard Title, Context, Label, Start Step, and Review Options. A 'Steps in Wizard' section shows a list of steps: 'Submit' and 'Abort', both marked as 'Configured by Rule'. A 'Steps Library' panel on the right contains a search bar and a list of steps: 'Contract Field Details', 'Contract Sale Items', 'Enter Line Items', 'Select Business Activity', 'Select Business Function', 'Select Customer Account', 'Service Plan Recommendation', and 'Service Plan Selection'. The interface includes 'Cancel' and 'Save and Exit' buttons at the top right, and an 'Activate Wizard' button at the top right of the main window. A 'New Step' button is located at the bottom right of the 'Steps in Wizard' section.

- **Wizard Component Library** – Use this tab to create reusable **Inputs** and **Steps** for your Wizard Designs. Separate, searchable libraries for both Inputs and Steps can be created and maintained. Metadata on Inputs and Steps in the library allow you to categorize and keep track of when Inputs and Steps are created or modified.

Configure - Quote - Contract

Search

Home
Wizard Designs
Wizard Component Library
Wizards +

Wizard Component Library
Home

Steps
New Step

| Actions | Step Name | Description | Keywords | Category | Subcategory | Owner | Last Modified Date |
|--|--------------------------|---|-----------|----------|-------------|-------|---------------------|
| Edit Del | Contract Details | Use this step to get additional contract details for an agreement record. | | Default | Default | | 11/18/2015 3:27 PM |
| Edit Del | Create Business Details | In this step the user will enter their business details. | | Default | Default | | 11/17/2015 2:42 PM |
| Edit Del | Initial Agreement Step | This is the first step for creating an agreement. | Agreement | Default | Default | | 11/16/2015 12:02 PM |
| Edit Del | Select Business Activity | Use this step to allow a user to select business activity. | | Default | Default | | 11/18/2015 3:04 PM |
| Edit Del | Select Business Function | Select Business Function step for Agreement creation. | | Default | Default | | 11/18/2015 3:14 PM |
| Edit Del | Select Customer Account | Use this step when a customer needs to choose an account. | | Default | Default | | 11/18/2015 3:09 PM |
| Edit Del | Step | | | | | | 11/17/2015 2:52 PM |

Page 1 of 1
<< Previous Next >>
Records per page: 10 ▼

Input Controls
New Input Control

| Actions | Control Name | Description | Keywords | Category | Subcategory | Owner | Last Modified Date |
|--|----------------------------|---|---------------------------|----------|-------------|-------|---------------------|
| Edit Del | Agreement End Date | Agreement end date wizard input field. | agreement end date term | Default | Default | | 11/16/2015 2:27 PM |
| Edit Del | Agreement Start Date | A wizard input field version of agreement start date. | agreement start date term | Default | Default | | 11/16/2015 2:25 PM |
| Edit Del | Billing Address | | | Default | Default | | 11/17/2015 1:58 PM |
| Edit Del | Business Activity | | | Default | Default | | 11/18/2015 11:31 AM |
| Edit Del | Business Function | Allows user to select business function for record. | | Default | Default | | 11/18/2015 3:02 PM |
| Edit Del | Customer Account | Allows user to specify customer account. | | Default | Default | | 11/18/2015 3:09 PM |
| Edit Del | Initial Agreement Question | This is the first question to be used for any agreement creation wizard first step. | agreement | Default | Default | | 11/16/2015 11:46 AM |
| Edit Del | MSSA | Asks if there is a Master Sales & Service Agreement | | Default | Default | | 11/18/2015 3:22 PM |
| Edit Del | MSSA Contract Number | Allows the user to specify a MSSA Contract Number for an agreement | | Default | Default | | 11/18/2015 3:25 PM |
| Edit Del | Transaction Type | | | Default | Default | | 11/18/2015 11:32 AM |

Page 1 of 1
<< Previous Next >>
Records per page: 10 ▼

- **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.

| Action | Wizard Name | Status | Wizard Design | Owner | Last Modified Date |
|----------|------------------------|-------------|--|------------|---------------------|
| Continue | Agreement Wizard 1 | In Progress | Agreement Wizard 1 | [Redacted] | 11/16/2015 11:58 AM |
| Review | Agreement Wizard 1 | Submitted | Agreement Wizard 1 | [Redacted] | 11/16/2015 11:58 AM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [Redacted] | 11/17/2015 12:09 PM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [Redacted] | 11/16/2015 2:49 PM |
| Continue | Basic New Agreement | In Progress | Basic New Agreement | [Redacted] | 11/17/2015 12:08 PM |
| Review | Create Basic Agreement | Aborted | Create Basic Agreement | [Redacted] | 11/19/2015 6:31 PM |

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

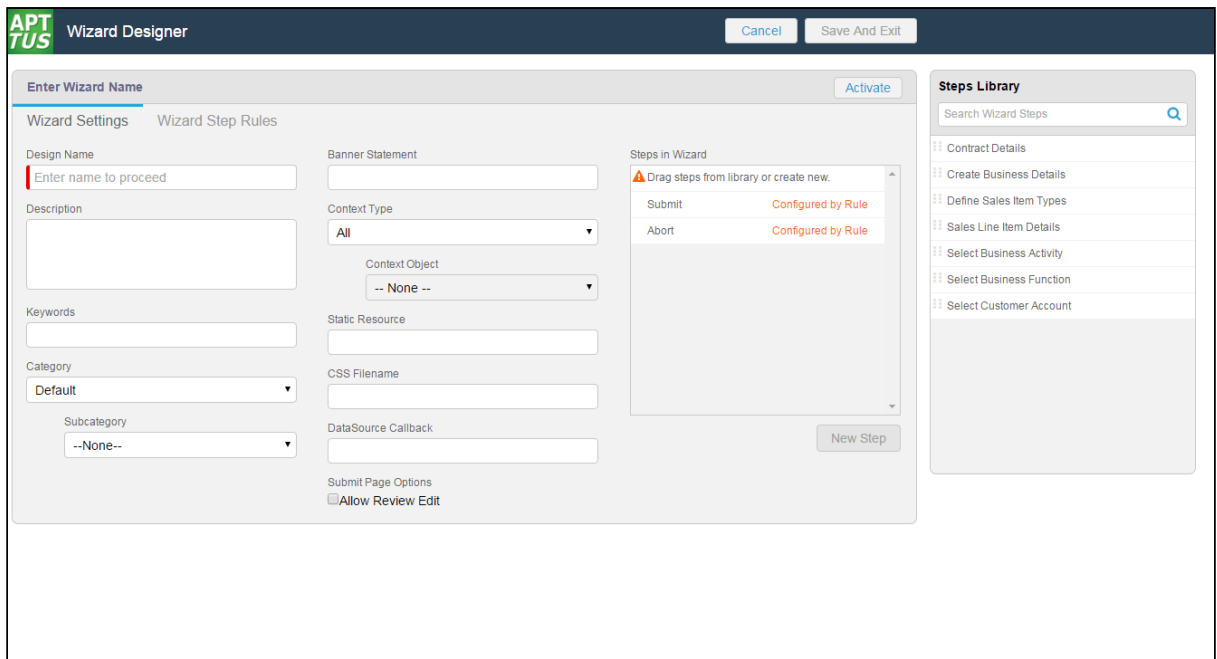
The first step in designing a Wizard is to define the basic settings for your Wizard, including the name, description and other search properties, as well as the **Context** (for one Object or All Objects) and the **Start Step**.

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 | <p>Enter the static resource name where your banner logo (must be named "logo.png"), foreground images (for branding of any steps) and your CSS file reside. Banner height is 50 pixels. The CSS file you provide can override any style present in the runtime wizard—the margin-left of the Title/Breadcrumbs in the banner can be modified to allow for more breathing room from where the logo is placed. How to create your static resource:</p> <ol style="list-style-type: none"> 1) Place all images and .css files inside a single folder and compress them into a ZIP. 2) Go to Salesforce Setup and enter "Static Resources" into the Quick Search box. 3) Create a new <i>Public</i> Static Resource and upload the ZIP file. |
| CSS File Name | The name of the CSS file located in the static resource (e.g., "style.css"). |
| DataSource Callback | Enter the name of the Callback Resource that will store values to pre-populate runtime input responses when this design is used to create a new Wizard. This resource holds the implementation class name for the callback interface. The interface contains a <code>getData()</code> method and returns a JSON string to pre-populate fields in the Wizard. |
| Allow Review Edit | Select this checkbox to enable the Wizard runtime user to edit steps during the Wizard review prior to submission. |

 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 screenshot shows the 'Wizard Designer' interface for 'CC Business Wizard'. The 'Wizard Settings' tab is active. The form includes the following fields and options:

- Design Name:** CC Business Wizard
- Description:** Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc.
- Keywords:** CC Business
- Category:** Business
- Subcategory:** All
- Banner Statement:** Your Business Wizard at Work
- Context Type:** Object
- Context Object:** Agreement
- Static Resource:** (empty)
- CSS Filename:** (empty)
- DataSource Callback:** (empty)
- Submit Page Options:** Allow Review Edit
- Steps in Wizard:** A list showing 'Submit' and 'Abort', both 'Configured by Rule'. A 'New Step' button is circled in red at the bottom right of this section.


The Step Settings form is displayed.

The screenshot shows the 'Wizard Designer' interface for 'CC Business Wizard' in the 'Enter Step Name' step. The 'Step Settings' tab is active. The form includes the following fields and options:

- Step Name:** Enter name to proceed
- Description:** (empty)
- Keywords:** (empty)
- Category:** --None--
- Subcategory:** --None--
- Banner Statement:** (empty)
- Runtime Help Text:** (empty)
- Context Type:** --None--
- Context Object:** -- None --
- Input Group Option:** --None--
- Image Filename:** (empty)
- Inputs:** A list with a 'New Input' button at the bottom right.

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 | <p>Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups):</p> <p>None - Select this option to display all Inputs for the step in the sequence listed in the Inputs pane.</p> <p>Repeatable - Select this option to allow the end-user to add multiple records for selected Inputs in list format. User can click the Add Item button to add additional values for the same group of Inputs (e.g., multiple Addresses).</p> <p>Table Layout - Select this option to allow the end-user to add multiple records for selected inputs in tabular format. User can click the Add Item button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.)</p> <p>Two Column Layout - Select this option to display selected inputs to the end-user in two columns.</p> <div data-bbox="676 1016 1426 1223" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> 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.</p> </div> |
| Image Filename | <p>Filename of the image located in the Static Resource (defined in Wizard Settings) to display in this step to the right of the input controls. For information on setting up the Static Resource, refer to Configuring Wizard Settings.</p> <p>Note: You can only add images to steps created within a specific Wizard design. You cannot add images to steps created from the Component Library.</p> |

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

 You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added:
Add more inputs from the Inputs Library in the sequence you want them to appear in the step.

- Hover over an Input in the list and click **Edit** to edit the input settings for this step only.
 - Hover over an Input in the list and click **Delete** to remove an Input from the step.
 - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see [Creating Inputs from the Wizard Designer](#).
 6. To create rules which govern inputs for the current step, click on **Input Rules** (see [Configuring Step Input Rules from the Wizard Designer](#)).
 7. Click **Save And Use in Wizard** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form.

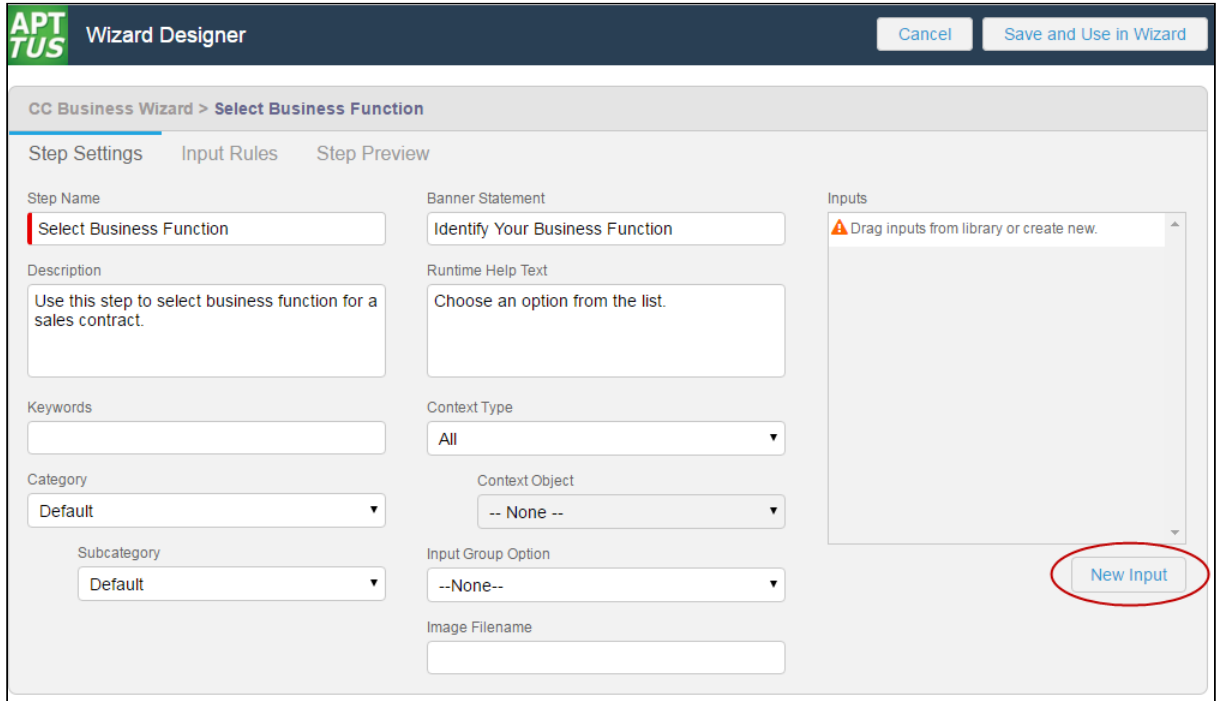
Creating Inputs from the Wizard Designer

Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

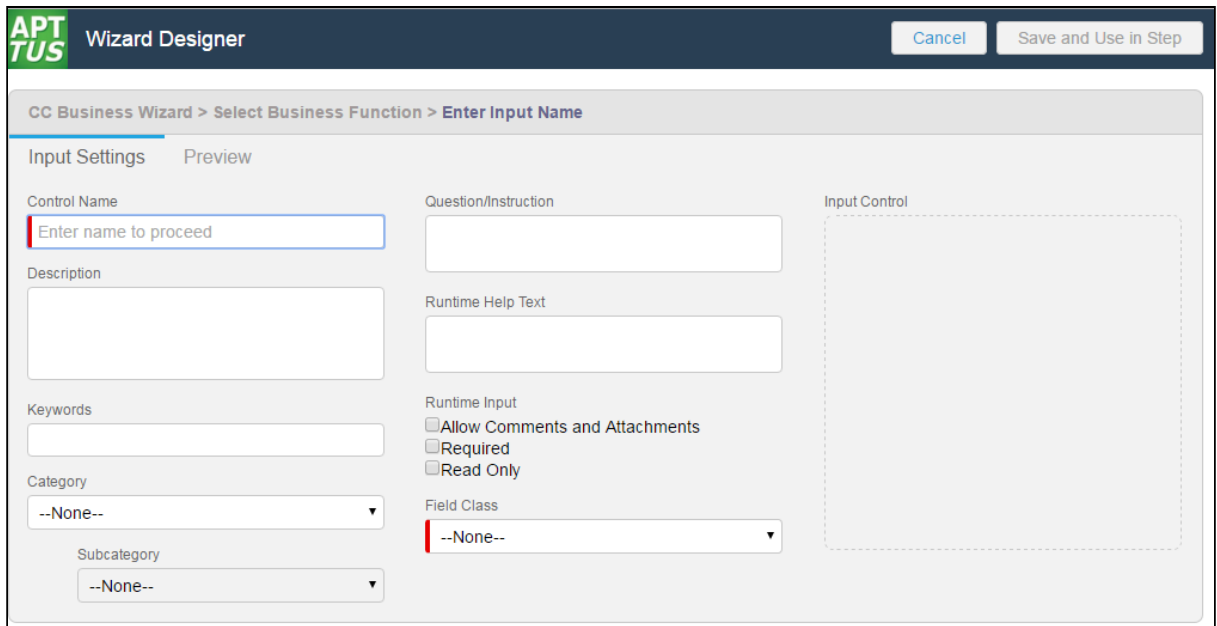
If an Input you want to use in a step does not exist in the Inputs Library, you can create one and use it with your step. Inputs created in this way can be saved for use in the current Wizard design only.

To create a new Input from a Step

1. From the Step Settings form, click **New Input**.



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. |

| Input Setting | Description |
|----------------------|---|
| Question/Instruction | Enter a question or instruction which the end user will see in the runtime wizard. |
| Description | Enter a description for the input which describes its intended use (for example, "Use this Wizard to create MSA Agreements for Acme.") |
| Keywords | Enter a list of keywords which can be used to search for this Input. |
| Category | Choose an option from a drop-down list of pre-defined Input Categories (define picklist values on the Wizard Input Control object). |
| Sub Category | Choose an option from a drop-down list of pre-defined Input Sub Categories (define picklist values on the Wizard Input Control object). |
| Runtime Help Text | Enter text to display when the user hovers over the help icon next to the question/instruction. |
| Runtime Input | Determine how the end user can interact with this Input at wizard runtime: |

| Input Setting | Description |
|---------------|--|
| | <p>Allow Comments and Attachments - Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach. For an example of how this looks in the Wizard, see Running Wizards.</p> <div data-bbox="644 633 1426 1357" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>i How Comments and Attachments are used in the Wizard</p> <p>For any type of Wizard, all runtime comments and attachments are saved in the Wizard Runtime Input instance record under Notes & Attachments. You can make use of these comments and attachments through your own implementations.</p> <p>If you design a Wizard to create a record, comments and attachments are copied to the Notes & Attachments list only if the corresponding input uses an Object for the same object created by the record (e.g., Input defined as 'Field Class = Object Field,' 'Object = Agreement' when the Wizard creates as Agreement record). Notes containing comments are named after the Object Field for which they were entered (e.g., "Account Notes," or "Agreement Risk Rating Notes").</p> </div> <p>Required - Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input.</p> <p>Read Only - Select this check box if you plan to have the input value set by Step Input rules <i>in all cases</i>. The end user will not be able to change the value of this input.</p> |

| Input Setting | Description |
|---------------|---|
| Field Class | <p>The Field Class defines the type of response you expect for the input.</p> <ul style="list-style-type: none"> • Wizard Input Field – Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: <ul style="list-style-type: none"> • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area <p>If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses.</p> • 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.

The screenshot shows the APTUS Wizard Designer interface. At the top, there is a dark blue header with the APTUS logo on the left, the text "Wizard Designer" in the center, and two buttons on the right: "Cancel" and "Save and Use in Step". Below the header is a breadcrumb trail: "CC Business Wizard > Select Business Function > Agreement Start Date". Underneath the breadcrumb, there are two tabs: "Input Settings" and "Preview", with "Preview" being the active tab. The main content area shows a preview of a date input field. The field has a label "Enter a start date for your Sales contract." followed by a question mark icon. Below the label is a text input box containing the date "4/20/2016".

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.

The screenshot shows the APTUS Wizard Designer interface for configuring a step. The title bar reads 'APTUS Wizard Designer' with 'Cancel' and 'Save and Use in Wizard' buttons. The breadcrumb is 'CC Business Wizard > Select Business Function'. The 'Step Settings' tab is active, showing fields for Step Name ('Select Business Function'), Description ('Use this step to select business function for a sales contract.'), Keywords, Category ('Default'), Subcategory ('Default'), Banner Statement ('Identify Your Business Function'), Runtime Help Text ('Choose an option from the list.'), Context Type ('All'), Context Object ('-- None --'), Input Group Option ('--None--'), and Image Filename. The 'Inputs' pane on the right shows a list with 'Agreement Start Date' circled in red. A 'New Input' button is located at the bottom right of the Inputs pane.

Configuring Step Input Rules from the Wizard Designer

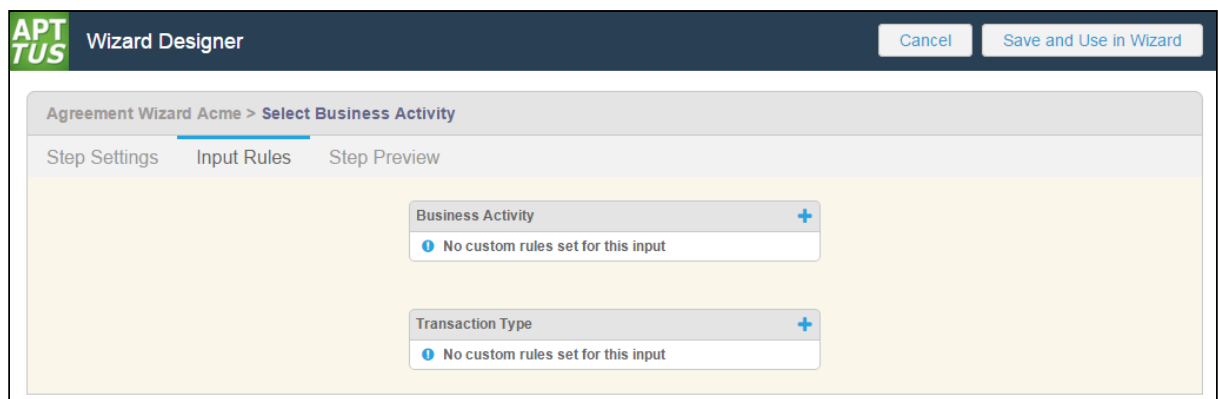
Step Input Rules allow you to configure rules and expressions for your Inputs at Wizard runtime. These rules apply to Inputs which are part of the same step, and generally trigger based on user interaction with the Wizard. Input rule types can be configured to:

- *Enable or Disable* Inputs
- *Show or Hide* Inputs
- Determine the Focus Object of the Wizard (e.g., Agreement)
- Determine the Record type for the focus object's record to be created (e.g., SOW, NDA, MSA, etc.)
- Set the value of one input based on the value(s) of other inputs.
- Set the value of a custom field based on the value(s) of inputs in the same step.

- i** If you are creating a Wizard Design which will create an object record you must include at least one Determine Focus Object and one Determine Record Type rule for each object to be determined.

To configure Input Rules for a Step

1. From the Step Settings form, click on the **Input Rules** tab. A graphic representation of the list of inputs for the step is displayed.

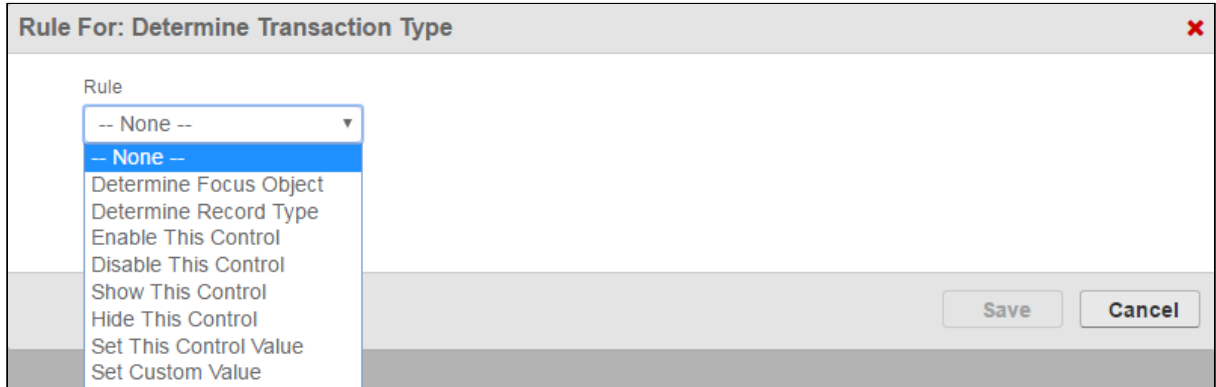


Inputs are displayed in the sequence you defined in Step Settings. Each input is displayed on the page with each input rule listed below the name of the input.


2. To create a new rule for an input, click on the **+** icon next to an input name or hover over the list of rules and click **New**. A dialog is displayed for defining the input rule.



3. Choose a rule type to use from the **Rule** drop-down list.



| Rule Type | Description |
|--------------------------------------|--|
| <p>Determine Focus Object</p> | <p>Use this rule to allow the user to determine the focus object for the runtime record to be created (e.g., Agreement object). Note: If this rule is used, there must also be a Determine Record Type rule used to create a record from the Wizard <i>if record types have been defined for the object</i>.</p> <p>Important: When using this rule, make sure to select the Rule Type before the Object to avoid configuration errors.</p> |
| <p>Determine Record Type</p> | <p>Use this rule to allow the user to determine the record type for the focus object's record to be created (e.g., SOW, MSA, NDA for Agreement). Note: If this rule is used, there must also be a Determine Focus Object rule used to create a record from the Wizard.</p> |
| <p>Enable This Control</p> | <p>Use this rule to allow the user to edit the field value for this input. This is the default setting for an input in a step. You can use this as a rule to conditionally enable the input if a previous input rule caused it to be disabled.</p> |
| <p>Disable This Control</p> | <p>Use this rule if you want to prevent the user from editing this input's value. You can use this rule to conditionally make an input read-only.</p> |
| <p>Show This Control</p> | <p>Use this rule to show the field value for this input at runtime. This is the default setting for an input in a step. You can use this rule to conditionally show the input if a previous input rule caused it to be hidden.</p> |

| 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 | <p>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.</p> <div data-bbox="673 734 1426 1021" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> When you set <code>APTS_WizardPersistHiddenValue</code> to true and you run a wizard containing a field that has a combination of <i>Set this control value</i> and <i>Hide this control</i> input rules, the field value is set in the object you are creating. For more information, see Admin Entries.</p> </div> |

4. To make your rule conditional, click **Add Another Rule** to add a condition to your rule type.

Rule For: Transaction Type ✖


Rule

Determine Focus Object Agreement

1. -- Select Input Control - -- Operator -- -- Value -- 🗑️

Advanced Expression

[Add Another Rule](#)

 Note: If you choose not to add conditions to your rule type, the Input rule you create will always trigger regardless of other rules in the step.

5. Use the drop-down menus to build a condition expression:
- Choose an input from the list of inputs in the current step

- Choose an operator for the expression which is specific to the chosen input's data type
- Choose a value for the expression which defines the condition

Rule For: Transaction Type

Rule

Determine Focus Object Agreement

1. Business Activity equals -- Value --

Advanced Expression 1

[Add Another Rule](#)

Save Cancel

6. Add more conditions as necessary to complete the rule. By default, all expressions use **AND** logic, meaning all conditions are required for the rule to execute. You can use the Advanced Expression field to change condition logic to **OR**, or create your own custom condition (for example, (1 OR 2) AND 3 if you want to make only 1 of the first 2 conditions required).

Rule For: Transaction Type

Rule

Determine Focus Object Agreement

1. Business Activity equals Sales Contract

2. Transaction Type equals Create

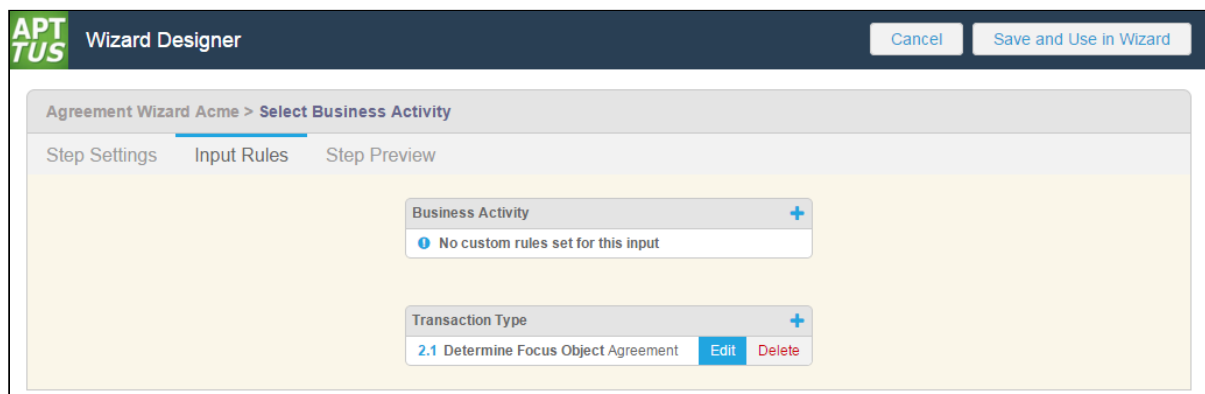
Advanced Expression 1 AND 2

[Add Another Rule](#)

Save Cancel

i There is no limit to the number of conditions you can create for a single input rule.

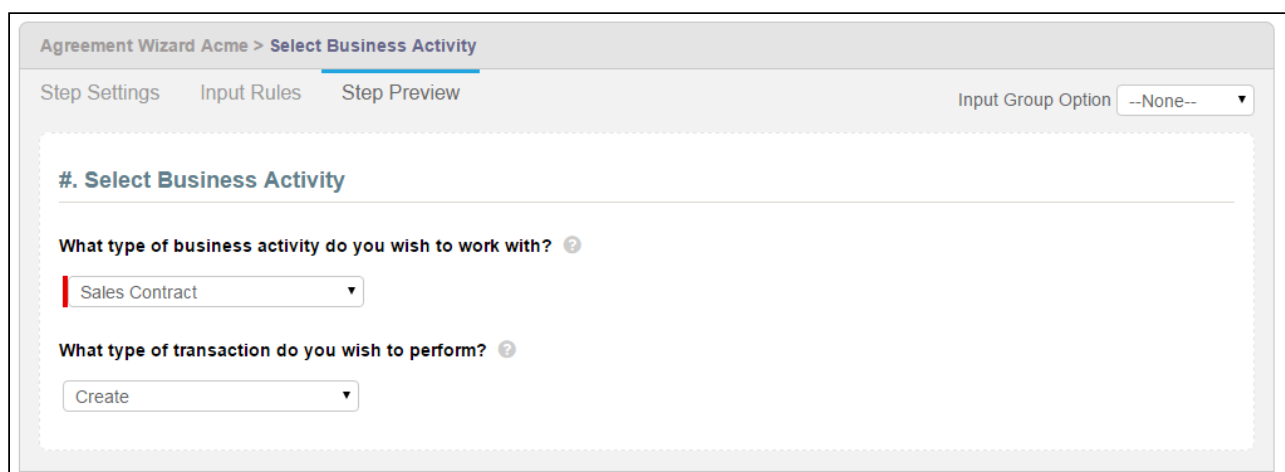
7. Click **Save** to save your new input rule or **Cancel** to discard rule changes. The step inputs graphic changes to reflect the newly-created rule.



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.

i The Step Name will always be preceded by a # symbol, which is a placeholder for the assigned step number at runtime (dependent on the sequence of steps in the Wizard).

You can also preview how the step will look when you choose an Input Group Option. Use the drop-down menu in the upper-right-hand corner of the preview page to switch between Input Group views. For example, the above preview rendered in a table layout would look as follows.

A - Business Wizard 1 > Sales Line Item Details

Step Settings Input Rules Step Preview Input Group Option Table Layout

#. Enter The Sales Line Item Details

| Product | Quantity | Unit List Price | Net Price |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Add Item

d 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.

i To configure Wizard Step Rules, you must have already added steps to the Wizard Design.

To configure Wizard Step Rules

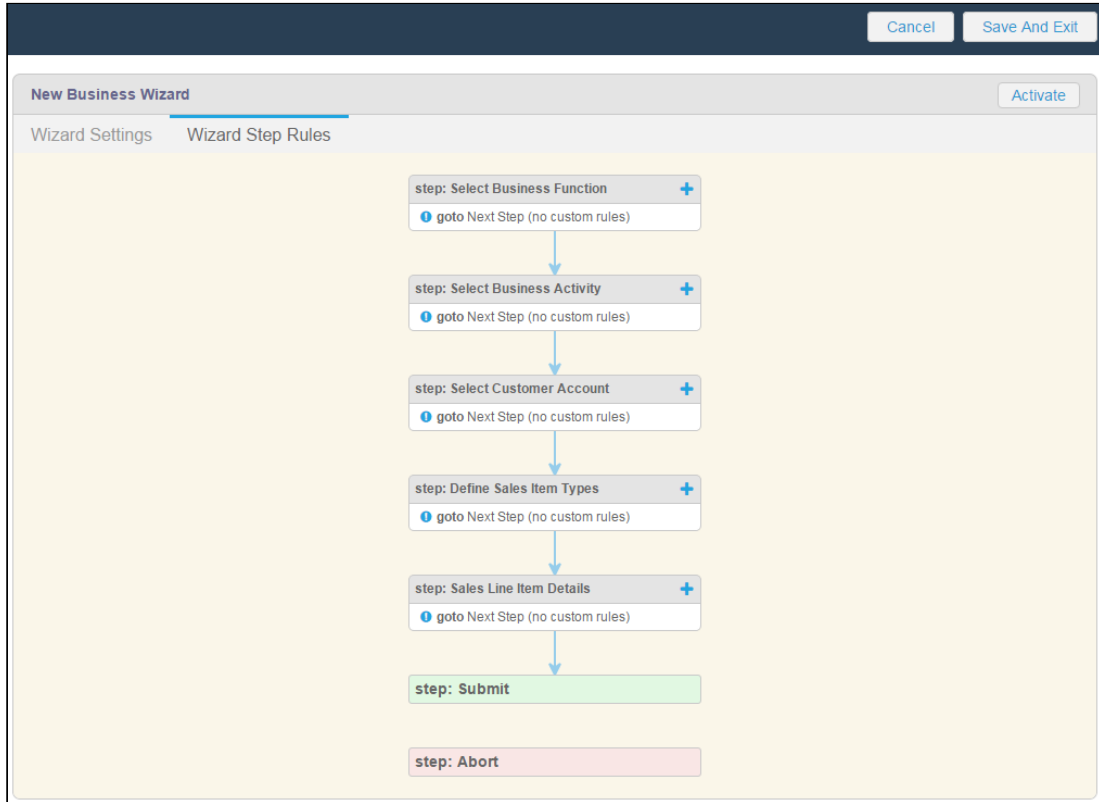
1. From the Wizard Designer Settings page, click on the **Wizard Step Rules** tab.

The screenshot shows the 'Wizard Designer' interface for a 'New Business Wizard'. The 'Wizard Step Rules' tab is highlighted with a red circle. The interface includes several sections:

- Wizard Settings:** Contains fields for Design Name (New Business Wizard), Description (Use this wizard for a variety of business functions), Keywords (Business Sales Contract Agreement), Category (Default), and Subcategory (Default).
- Banner Statement:** A text field containing 'Your Business Wizard at Work'.
- Context Type:** A dropdown menu set to 'Object'.
- Context Object:** A dropdown menu set to 'Agreement'.
- Submit Page Options:** A checkbox for 'Allow Review Edit' which is checked.
- Steps in Wizard:** A list of steps including 'Select Business Function', 'Select Business Activity', 'Select Customer Account', 'Define Sales Item Types', and 'Sales Line Item Details'. Below this list, 'Submit' and 'Abort' are shown as 'Configured by Rule'.

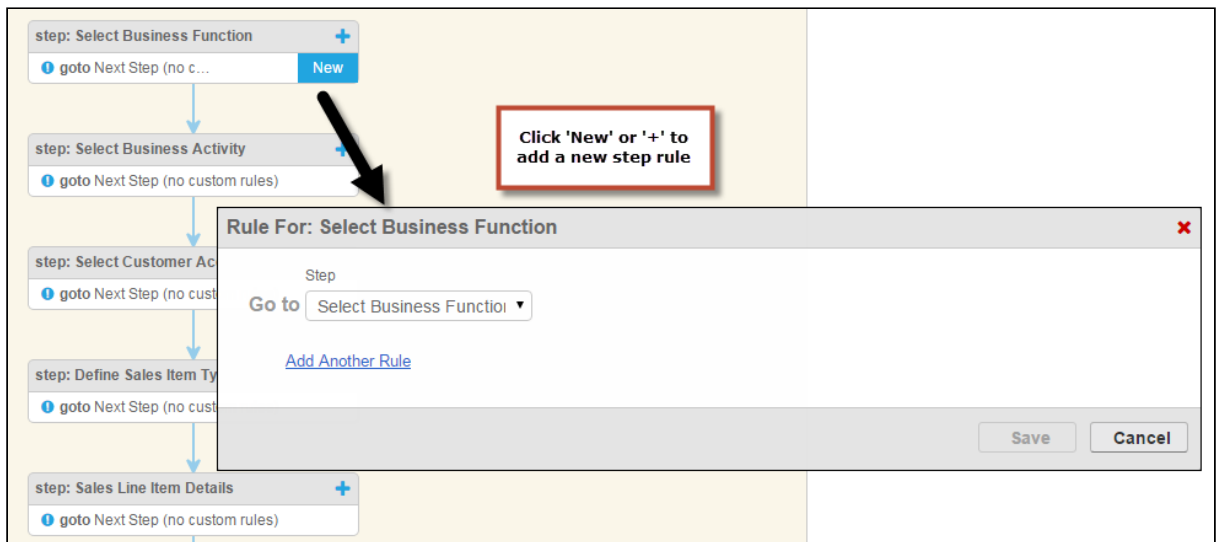
Buttons for 'Cancel', 'Save And Exit', 'Activate', and 'New Step' are also visible.

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.



3. Choose a Go to Step rule from **Step** drop-down list.

The screenshot shows a dialog box titled "Rule For: Select Business Function". Inside, there is a "Go to Step" dropdown menu. The menu is open, displaying a list of steps: "Select Business Function" (which is highlighted in blue), "Select Business Activity", "Select Customer Account", "Define Sales Item Types", "Sales Line Item Details", "Submit", and "Abort". To the right of the dropdown, there are "Save" and "Cancel" buttons.

| Go to Step Rule | Description |
|------------------------|--|
| Go to <i>Step Name</i> | Use this rule to define a specific step as the next step in the Wizard flow. For example, for the Select Business Function step rule, you could choose "Select Business Activity." |

| Go to Step Rule | Description |
|-----------------|---|
| Go to Submit | <p>Use this rule to make this step the last step in the Wizard. The Next button in Wizard runtime will be replaced with the Submit button. When Submit is clicked, the user is taken to the Wizard acknowledgement screen (or review page) and the Wizard is marked submitted (see Running Wizards for more information). Optionally, you can configure a URL to take an action upon Submit. Form your URL in one of two ways:</p> <ul style="list-style-type: none"> • If your Wizard creates a record as a result of submission (i.e. one of your inputs determines the focus Object AND Record Type), you can configure the URL to: <ul style="list-style-type: none"> • take the user to the default Salesforce record page for the record created (e.g., "%Agreement%"). • take the user to a page name with parameters (e.g., Submit Request Mode for an Agreement "Apttus__AgreementSubmitRequest?id=%Agreement%") • If your Wizard does not create a record but is simply posting information collected as the user interacts with the Wizard (for example, as a survey), use a REST URL for POST. The user is taken to the Wizard acknowledgement screen. <p>Note: Any URL entered for a Go to Submit rule must be relative, starting with the page name. For example, if you want to redirect the user to the agreement, use "%Agreement%" as the URL. The Object name between the % symbols represents the <i>Label</i>, not the API name.</p> <p>If there is NO URL specified for Go to Submit and the Wizard creates a record, by default the user will be taken to the Salesforce page for the newly-created record.</p> |

| Go to 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. |

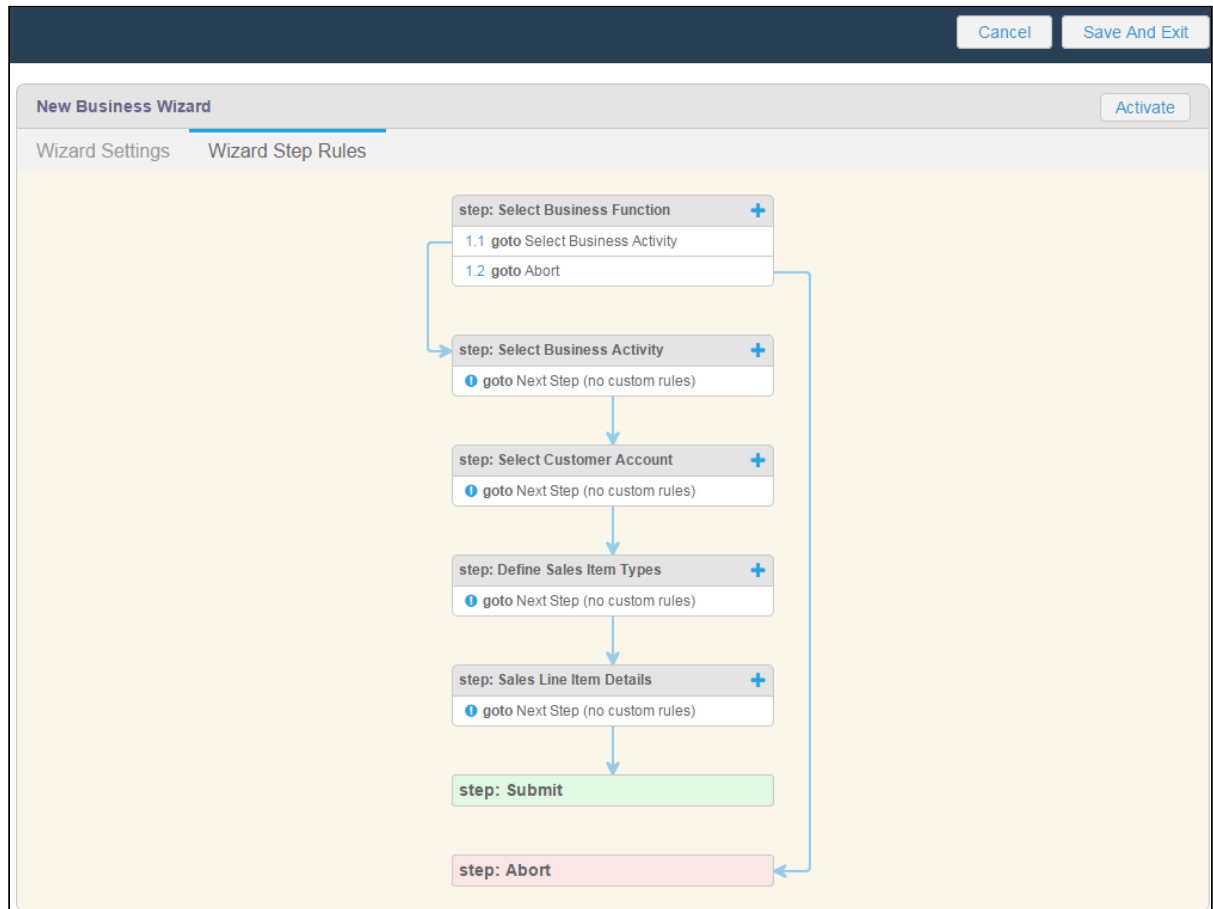
4. To make your Go to rule conditional, click **Add Another Rule** to add a condition to your rule type.

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).

i 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.



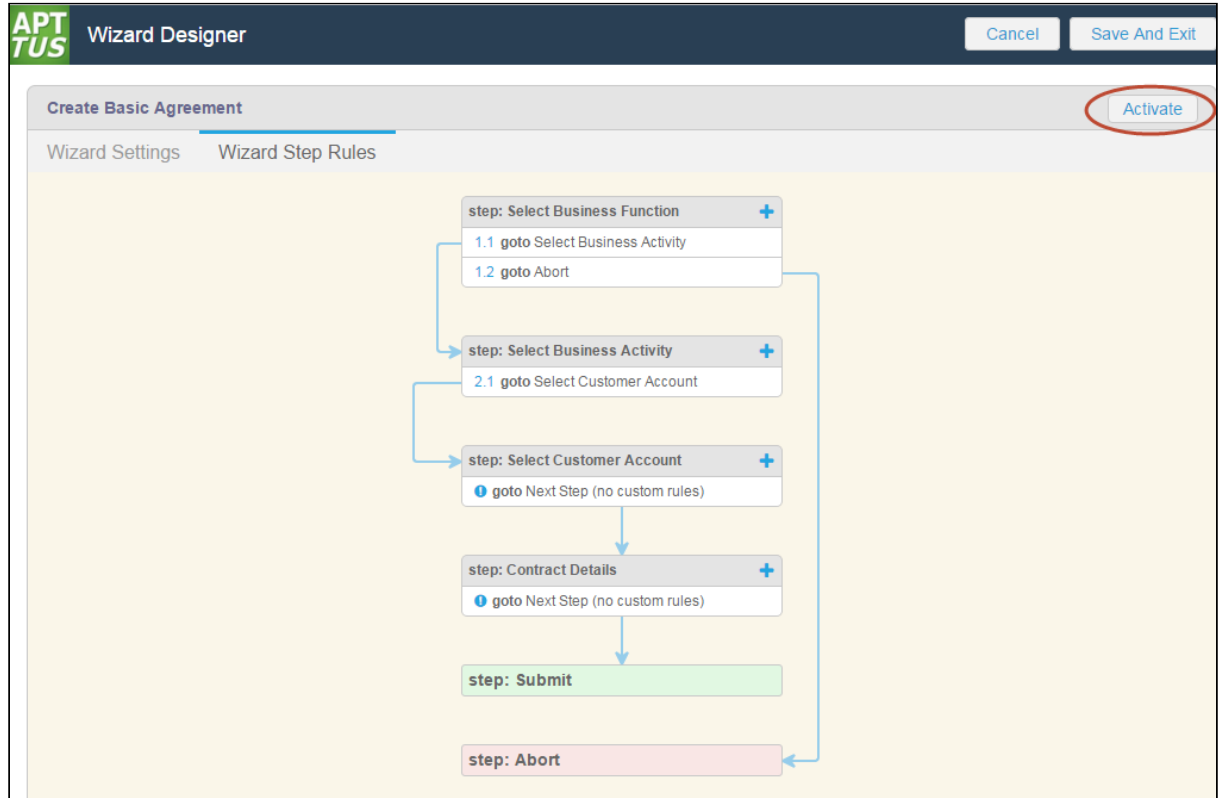
8. From the Wizard Step Rules tab you can:
- Click the **+** icon to create another step rule.
 - Click **Edit** next to an existing step rule to make changes.
 - Click **Delete** next to an existing step rule to delete the rule.
 - Click **Wizard Settings** to return to the Wizard.

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:

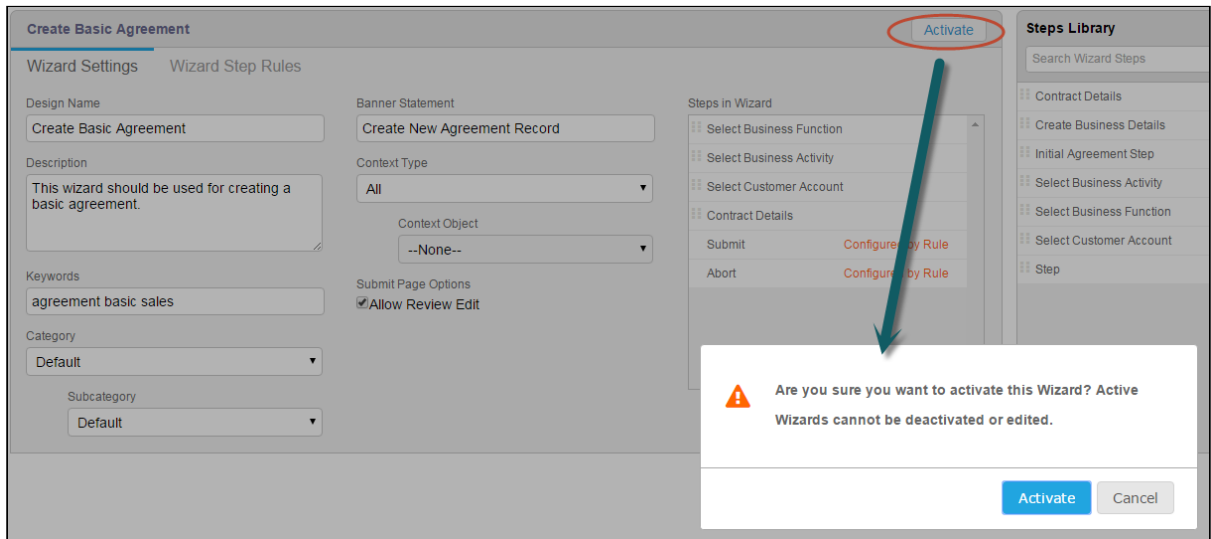
- from the **Wizard Step Rules** tab.



- from the **Wizard Settings** page.

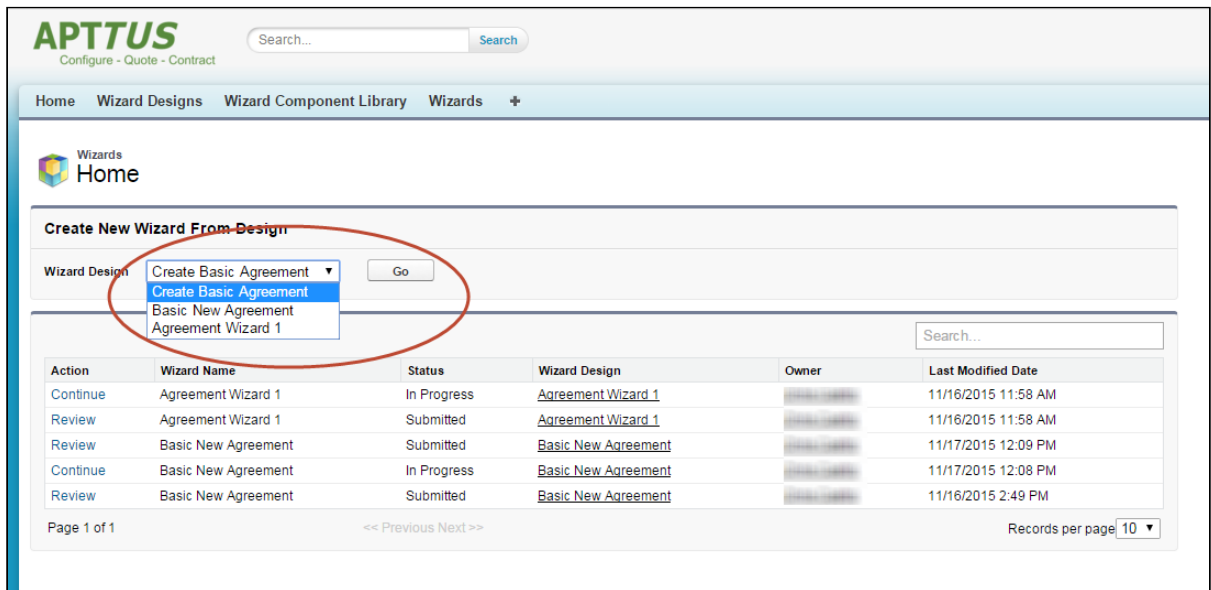
To activate a Wizard Design

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.

| Actions | Design Name | Description | Keywords | Category | Subcategory | Owner | Last Modified Date | Status |
|---------------|-----------------------------|--|-----------------------------------|----------|-------------|-------|--------------------|-------------|
| Edit Del | A - Business Wizard 1 | Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc. | CN Basic 1 | Default | | | 2/18/2016 11:27 AM | Draft |
| Edit | Agreement Creation Wizard 1 | Create an agreement record. | agreement | Default | Default | | 2/10/2016 1:10 PM | Activated |
| Edit Del | Agreement Wizard 1 | Wizard for creating an agreement record | | Default | Default | | 2/18/2016 11:27 AM | Draft |
| Edit Del | Agreement Wizard 2 | | | Default | | | 2/18/2016 11:27 AM | Draft |
| Edit Del | Agreement Wizard Acme | Create a new agreement record using this wizard. | | Default | Default | | 2/18/2016 11:27 AM | Draft |
| Edit Del | Basic New Agreement | | | Default | | | 2/18/2016 11:27 AM | Draft |
| Edit Del | Basic New Agreement | Use this Wizard to create a new agreement record. | agreement nda msa sow | Default | Default | | 2/18/2016 11:27 AM | Draft |
| Edit Retire | Business Wizard 2 | Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc. | CC Basic Business | Business | All | | 2/8/2016 5:52 PM | Deactivated |
| Edit Del | Business Wizard Release | Use this Wizard to create a Primary Sales Contract. | Business Sales Contract Agreement | Default | Default | | 2/18/2016 11:27 AM | Draft |
| Edit Del | Create Basic Agreement | This wizard should be used for creating a basic agreement. | agreement basic sales | Default | Default | | 2/18/2016 11:27 AM | Draft |

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.

APT TUS Wizard Designer Cancel Save And Exit

Create Basic Agreement Activated

Wizard Settings Wizard Step Rules

Design Name:

Description:

Keywords:

Category:

Subcategory:

Banner Statement:

Context Type:

Context Object:

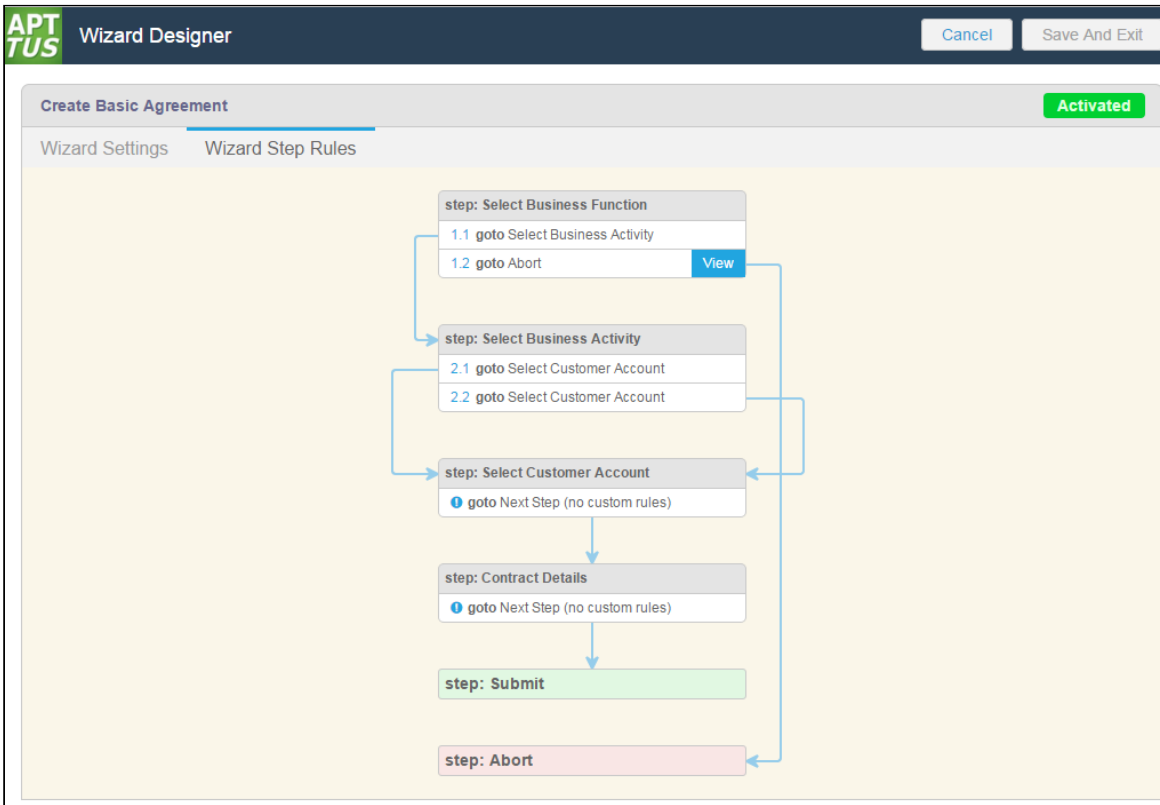
Submit Page Options: Allow Review Edit

Steps in Wizard

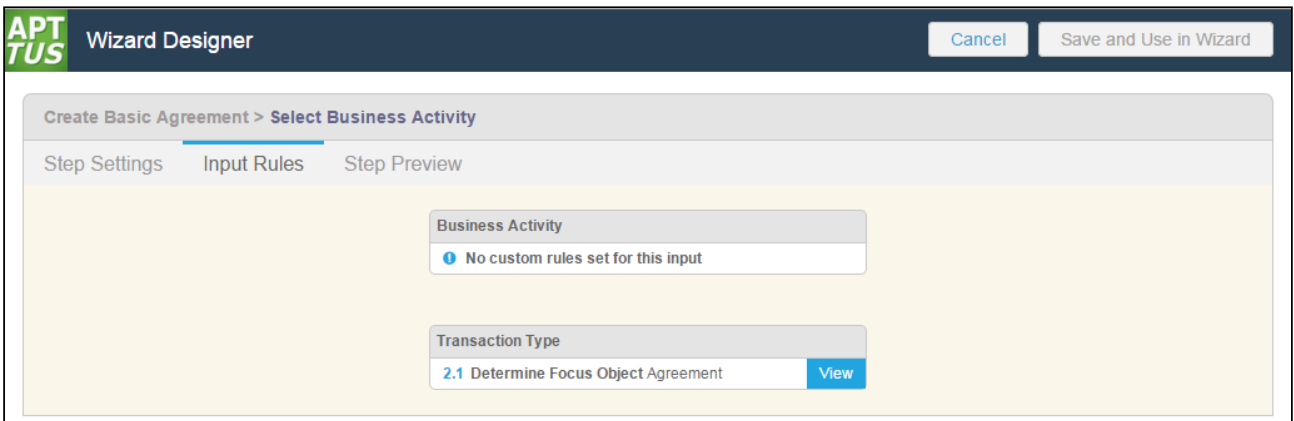
- Select Business Function View
- Select Business Activity
- Select Customer Account
- Contract Details
- Submit Configured by Rule
- Abort Configured by Rule

New Step

- 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.

| Wizard Designs | | | | | | | New Wizard Design | Search... |
|--------------------|-------------------------|--|-----------|-------------|----------|-------------|-------------------|-----------|
| Actions | Design Name | Description | Status | Keywords | Category | Subcategory | | |
| Edit Clone | Agreement Wizard 1 | | Activated | | Default | Default | | |
| Edit Clone | Business Survey 1 | | Activated | | Default | | | |
| Edit Clone | CC Business Wizard | Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc. | Activated | CC Business | Business | All | | |
| Edit Clone Del | New Business Wizard | Use this Wizard Design for a variety of basic business functions and activities encompassing sales, purchasing, partners, HR, etc. | Draft | CC Business | Business | All | | |
| Edit Clone | Sample Agreement Wizard | Use this Wizard to create an agreement record. | Activated | | Default | Default | | |

Using the Wizard Component Library

The Configurable Wizard offers a tab from which you can manage libraries of both Steps and Inputs. When you create a step or input from a Wizard Design, that step or input is available to that *specific wizard design only*. In many cases, you will want to create steps or inputs which can be used by more than one Wizard. Use the **Wizard Component Library** to create reusable steps and inputs.

The Wizard Component Library is comprised of two tables: **Steps** and **Input Controls**.

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 | <p>Select an option from the drop-down list to choose how Inputs will be displayed in the Step (as groups):</p> <ul style="list-style-type: none"> • None - Select this option to display all Inputs for the step in the sequence listed in the Inputs pane. • Repeatable - Select this option to allow the end user to add multiple records for selected Inputs in list format. User can click the Add Item button to add additional values for the same group of Inputs (e.g., multiple Addresses). • Table Layout - Select this option to allow the end user to add multiple records for selected inputs in tabular format. User can click the Add Item button to add additional values for the same group of Inputs (e.g. Agreement Line Item Products, Quantity, List Price, etc.) |

3. Drag-and-drop an Input from the Inputs Library to the **Inputs** pane. If you do not see your Input listed, use the type-ahead feature in the Search box to locate the Input you want to use.

 You cannot add inputs to a step unless the Step Name has been entered.

4. You can take the following actions on Inputs you have added:

Add more inputs from the Inputs Library in the sequence you want them to appear in the step.

 - Hover over an Input in the list and click **Edit** to edit the input settings for this step only.
 - Hover over an Input in the list and click **Delete** to remove an Input from the step.
 - Click and drag Inputs in the Inputs pane to reorder them.
5. If you do not find the correct input in the library and need to create a new one to use in your step, see [Creating Inputs from the Wizard Designer](#).
6. To create rules which govern inputs for the current step, click on **Input Rules** (see [Configuring Step Input Rules from the Wizard Designer](#)).
7. Click **Save** to save your changes or click **Cancel** to discard changes and return to the Wizard Design form. The new step is now available from the Wizard Component Library.

Creating Inputs

Input controls are the primary components of any wizard. They are the questions and instructions that you provide to the end users of your wizard. For example, you might create an input control that requires users to select picklist options, such as Business Function or Agreement Start and End dates. Input controls are reusable, so you can use them in as many steps as you want to.

Please note that any modifications to the input from within a Wizard Design will not affect the properties of an input saved in the library.

To create a new Input from the Wizard Component Library

1. From the Wizard Component Library, click **New Input Control**.
The 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 | <p>Determine how the end user can interact with this Input at wizard runtime:</p> <p>Allow Comments and Attachments - Select this check box to enable the end user to add comments and/or attachments in addition to the input control value. Comments are entered into a text area field and are limited to 500 characters. There is no limit to the number of files a user can attach.</p> <p>Required - Select this check box if a value is required for the input. An end user will not be able to complete the current step without entering a value for this input.</p> <p>Read Only - Select this check box if you plan to have the input value set by Step Input rules in all cases. The end user will not be able to change the value of this input.</p> |
| Field Class | <p>The Field Class defines the type of response you expect for the input.</p> <ul style="list-style-type: none"> • Wizard Input Field - Use this field class when you want the response to indirectly set other Wizard values. Wizard input fields values are only used to affect the value or state of other input controls using Step Input Rules. When you choose this field class, you must specify one of the following data types: <ul style="list-style-type: none"> • Checkbox • Date • Number • Picklist • Picklist Radio Button • Multi Picklist • Text • Text Area <p>If you choose to make the Wizard Input field a Picklist type, you must also enter valid values to be used as input responses.</p> • Object Field - Use this field class when you want the response to directly set a field value on the Salesforce object which is created from the Wizard (e.g., the "Agreement Start Date" field on the Agreement object). Use the drop-down list under Input Control to choose the Object Name, then choose the Field Name based on the object chosen. |


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 click Save, the values you provided in the wizard steps are saved and then reset to the values defined in the input rules. For more information see, [Configuring Step Input Rules from the Wizard Designer](#).

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 XXXXXXXXXX

Related To [a01A000000NV53](#)

Private


Title A - Business Wizard 1 Notes

Body This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU

Created By XXXXXXXXXX 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.

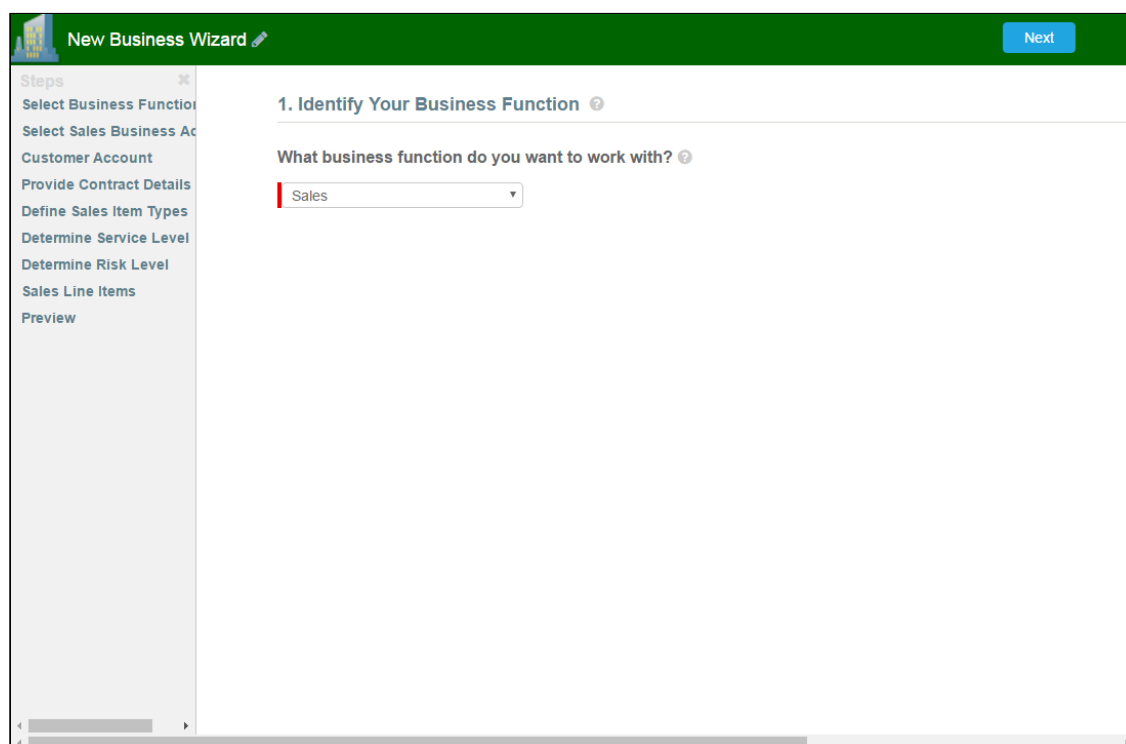
Using the Preview Sidebar

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.

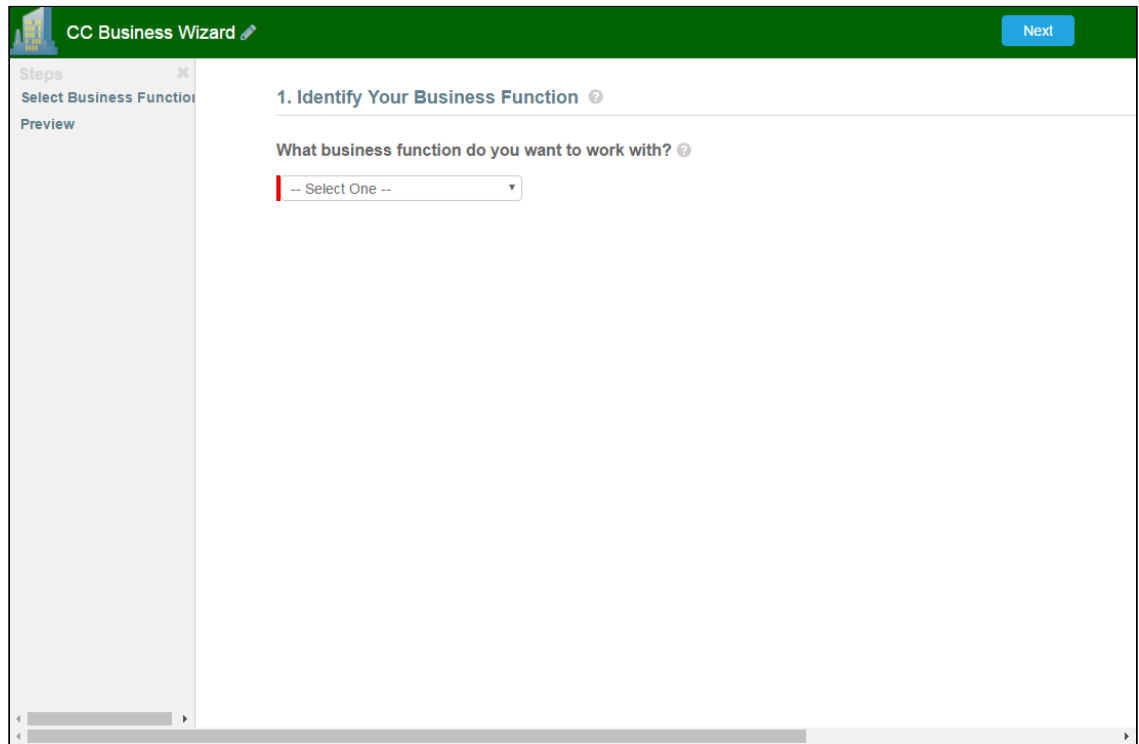
To use the Preview Sidebar

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.



i You can click on the X in the upper-right-hand corner of the sidebar at any time to collapse it.

3. Click on any step in the preview sidebar to preview it. **Important Note:** if you attempt to view a future step but the current step contains any required fields, you cannot preview that step until you have completed the required fields in the current step.

The screenshot shows the 'New Business Wizard' interface. At the top, there are 'Back' and 'Next' buttons. A sidebar on the left lists the steps: 'Steps', 'Select Business Function', 'Select Sales Business Activity', 'Customer Account', 'Provide Contract Details', 'Define Sales Item Types', 'Determine Service Level', 'Determine Risk Level', 'Sales Line Items', and 'Preview'. The main content area is titled '2. Identify Your Sales Business Activity'. It contains two questions: 'What type of business activity do you wish to work with?' with radio buttons for 'Sales Quote', 'Sales Contract', and 'Sales Order'; and 'What type of transaction do you wish to perform?' with radio buttons for 'Create' and 'Request'. The 'Create' option is selected. A red error message at the top states: 'Error: What type of transaction do you wish to perform?: Validation Error: Value is required.' A red arrow points from a text box that says 'must complete required field before moving to any other step' to the 'Request' radio button. Below the questions is an image of a pen and a document labeled 'CONTRACT'.

4. Click on **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.
5. Click **Back** to return to the last step you worked with.

Example: Configuring a Sales Contract Wizard

The following section describes an example process for an Agreement record-creation Wizard. This Wizard will take the user through the process of creating an Agreement record with a Sales Contract record type. This example demonstrates the use of Wizard Step rules and Step Input rules to **Determine Focus Object** and **Determine Record Type** for the record, in addition to showing how to conditionally **Hide**, **Disable** and **Set** input controls based on values entered by the user. Understanding these processes will improve your ability to create your own unique Wizard designs.

Note: The example provided here does assume that 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.

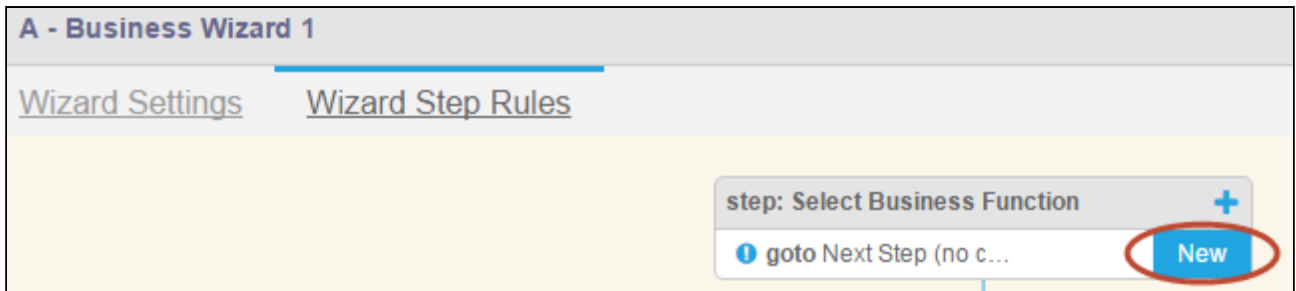
The Step Rule for this example will determine whether or not the user can continue with the Wizard. If the user chooses "Sales" and clicks **Next** the Wizard should continue to the next step. However, if the user chooses any other option, the Wizard prompts the user to **Abort**.

Create Step Rules

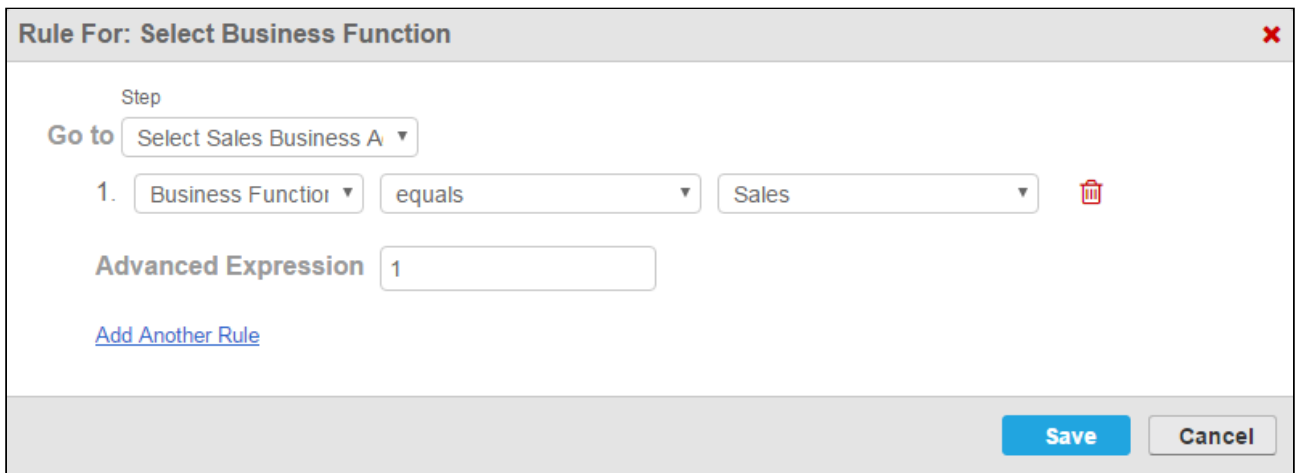
Because of this, two **Go to Step** rules must be created:

- **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

Rule For: Select Business Function ✖

Step

Go to

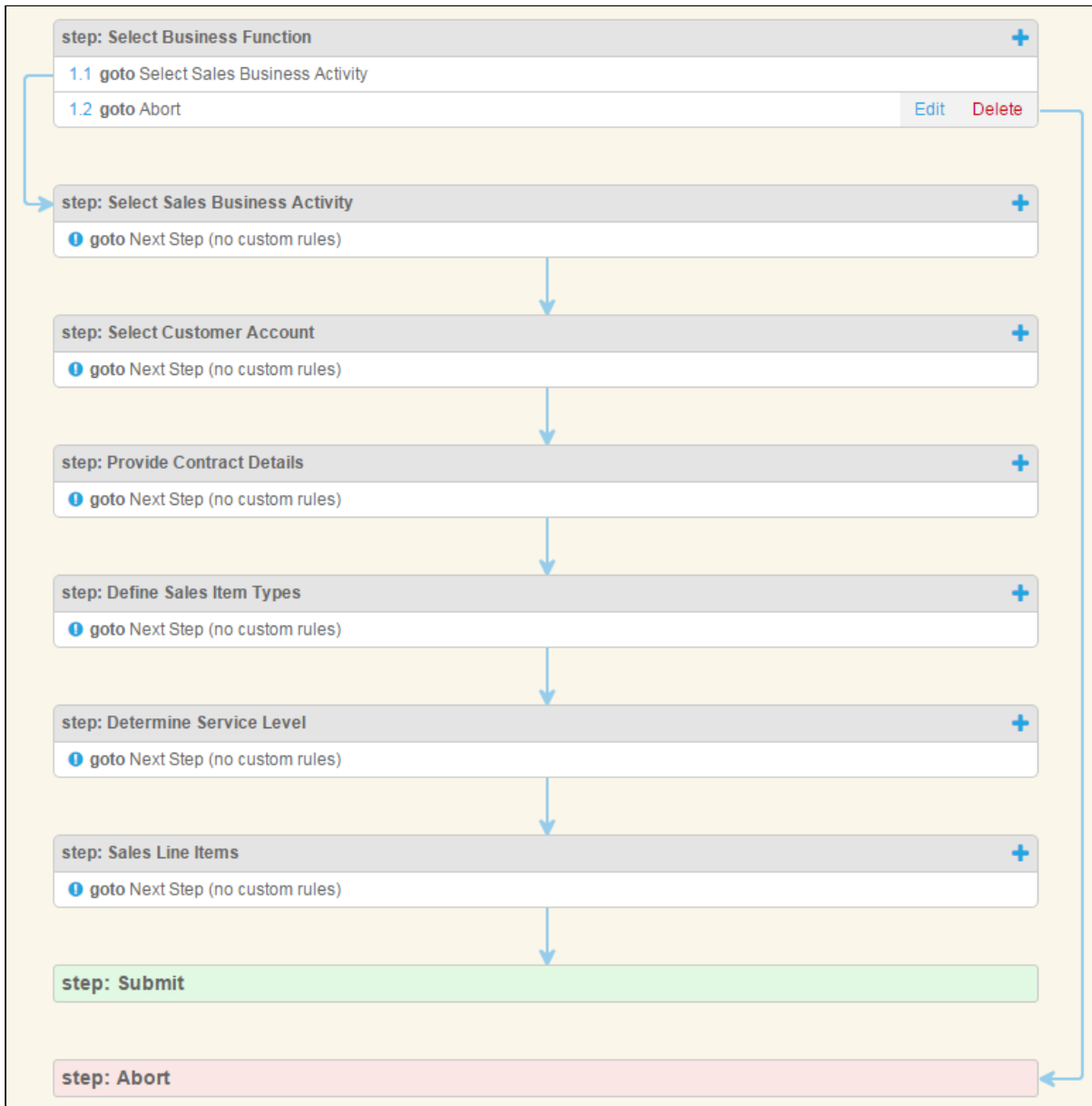
1. 🗑️

Advanced Expression

[Add Another Rule](#)

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)

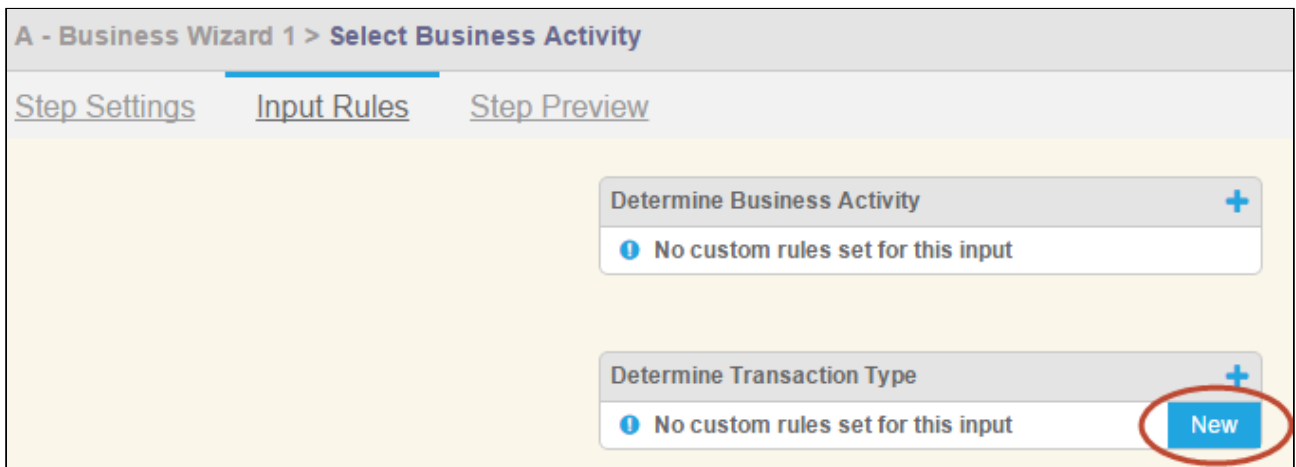
The following example demonstrates an Input Rule for determining the focus object for your runtime Wizard. In this example, inputs entered by the user will determine the focus object of the record to be created (Agreement).

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)

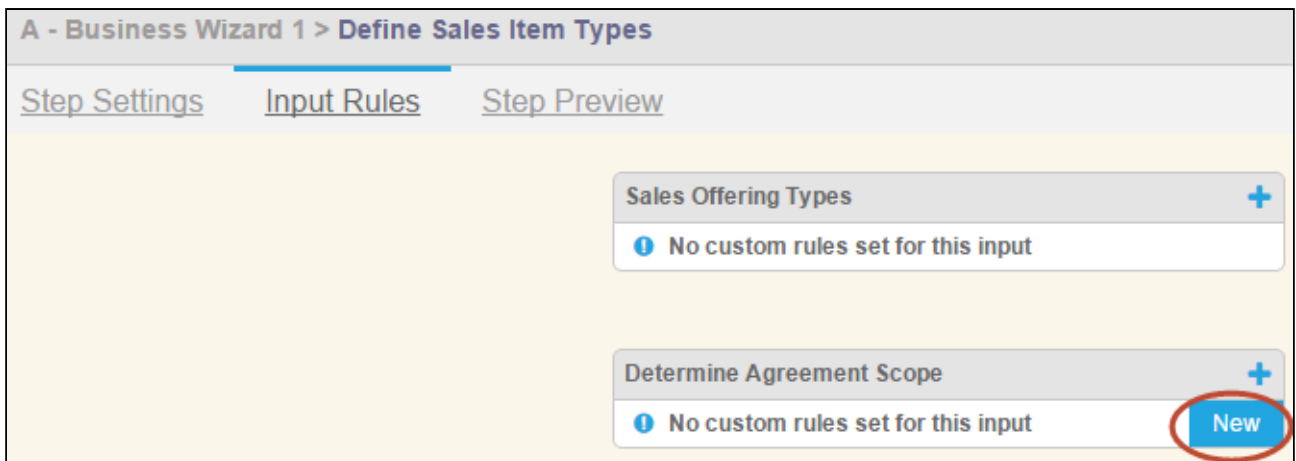
The following example demonstrates an Input rule for determining the record type of the already determine focus object for your runtime Wizard. In this example, inputs entered by the user will determine the record type to be used for the record to be created (Primary Sales Contract).

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

Rule For: Determine Agreement Scope

Rule

Determine Record Type Agreement SOW

1. Sales Offering Types equals All

2. Determine Agreement Scope equals Full Contract

Advanced Expression 1 AND 2

[Add Another Rule](#)

Save Cancel

The **Determine Record Type** rule is defined using two separate expressions. The record will resolve to Agreement if:

- **Sales Offering Types** equals "All" AND;
- **Determine Agreement Scope** equals "Full Contract"

An Advanced Expression is used which specifies both expressions must resolve to true for the rule to be satisfied. Any other combination of responses to the inputs in this step will not result in "SOW" being determined as the record type.

After the rule is defined, the rule type and record type are displayed on the Input Rules page for easy reference.

A - Business Wizard 1 > Define Sales Item Types

Step Settings Input Rules Step Preview

Sales Offering Types +

No custom rules set for this input

Determine Agreement Scope +

2.1 Determine Record Type Agreement SOW

How it looks in the Wizard

When a user reaches this step in the Wizard, they are prompted to enter a response to each question.

When the user chooses the proper responses to satisfy the input rule, the record type being specified by the Wizard is displayed at the bottom of the page.

Now that a Record Type has been determined by the Wizard, when the Wizard is submitted, an Agreement record of the type Primary Sales Contract will be created.

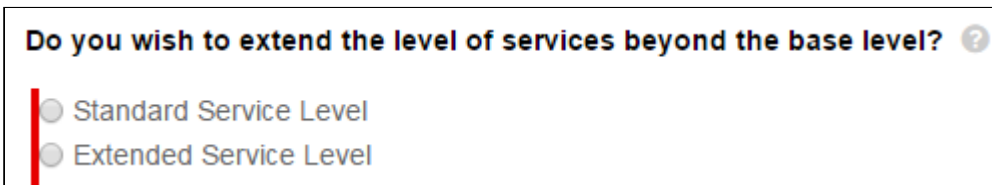
Example: Step Input Rule #3 (Modify Controls)

The following example demonstrates how you can modify the behavior and value of input controls for a step using the input rules **Hide This Control** and **Set This Control Value**. In this example, the user is defining the service level to be used in the contract. If the user chooses one option of a certain input, several inputs in the step will be hidden (Hide This Control). Similarly, depending on the combination of responses entered by the user for multiple inputs, the final value of one input will change (Set This Control Value).

Create Input Rules: Hide This Control

In this example, several input rules are defined for the **Determine Service Level** step.

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.

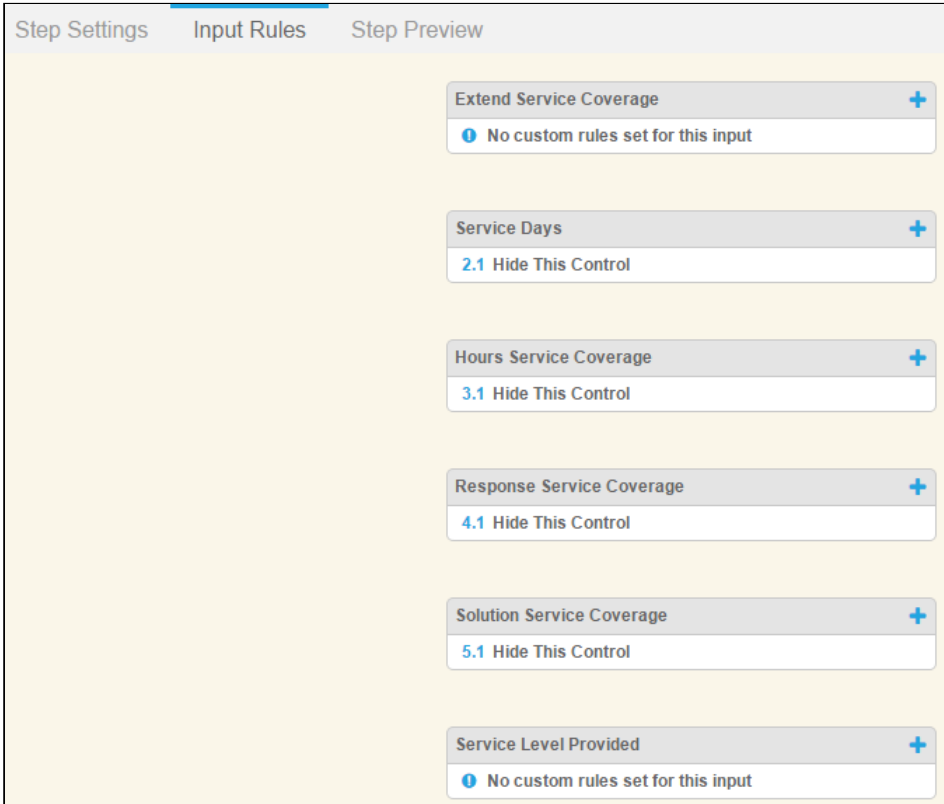


The screenshot shows a question: "Do you wish to extend the level of services beyond the base level?" followed by two radio button options: "Standard Service Level" and "Extended Service Level". A red vertical bar is positioned to the left of the radio buttons.

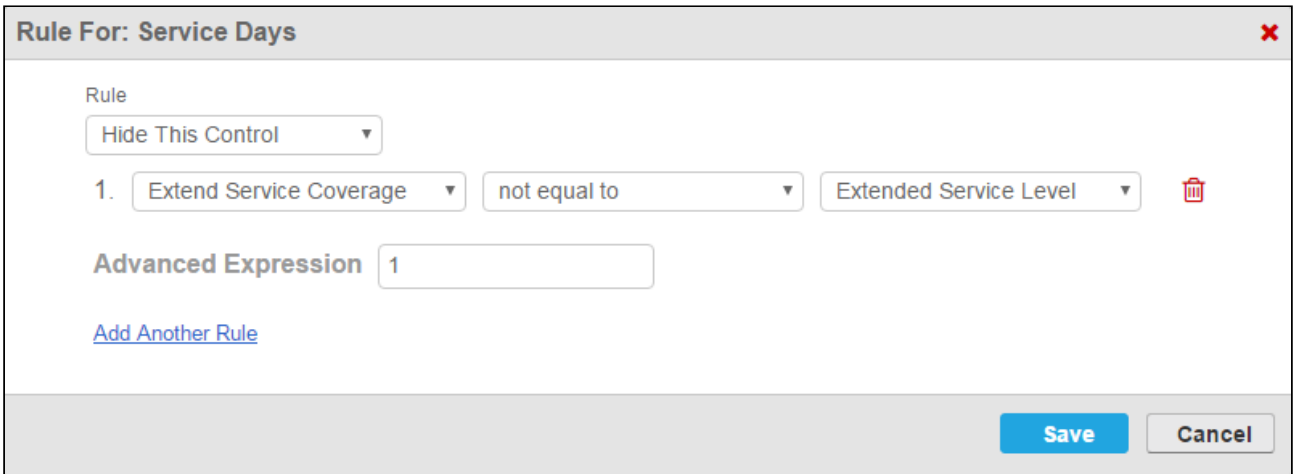
If **Standard Service Level** is chosen, the only input shown will be **Service Level Provided** (the value of this input will also be determined by this choice using a Set This Control value, which is described later on this page).

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**.

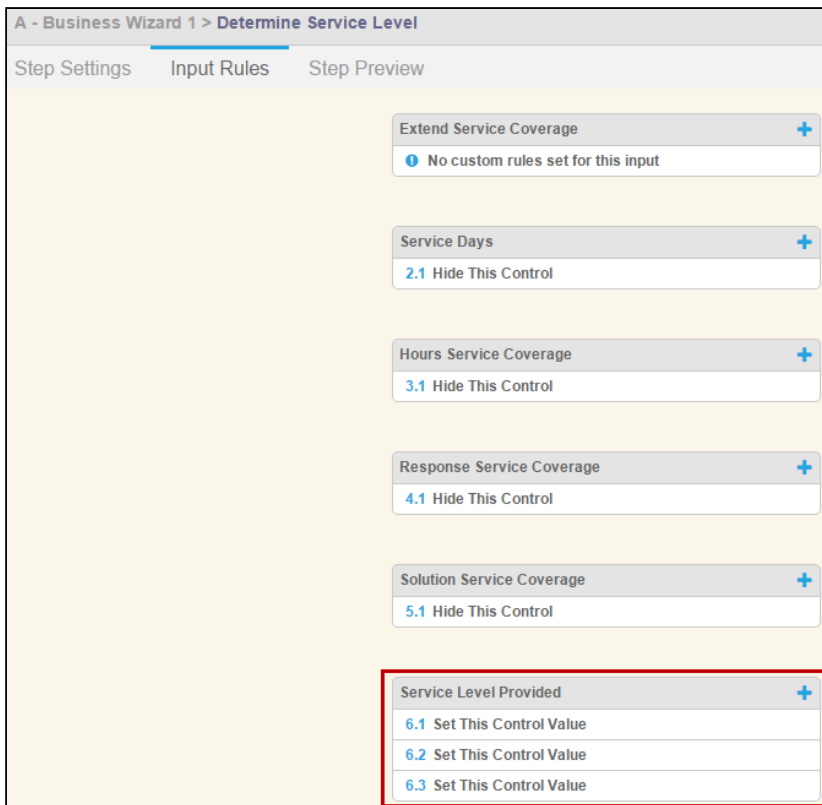
How it looks in the Wizard

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.

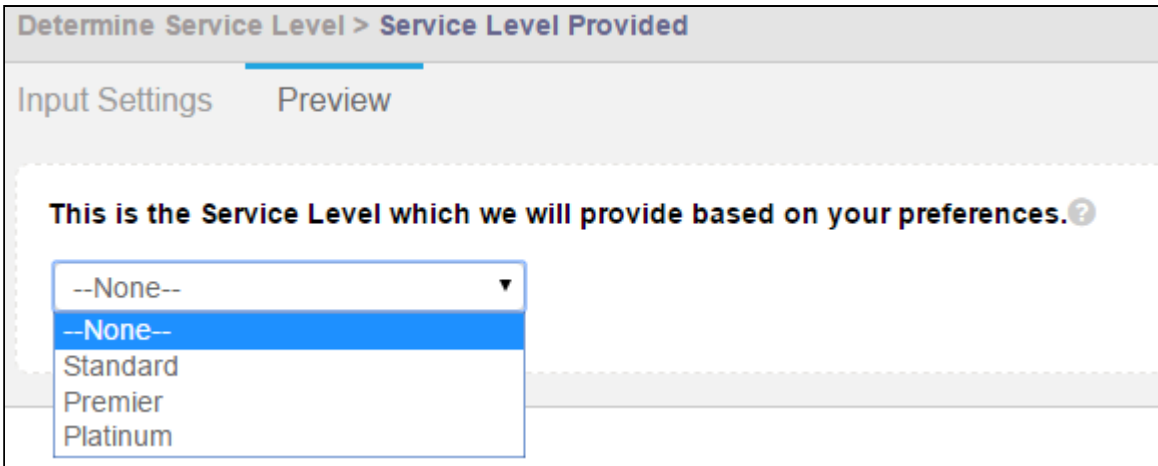


It is recommended that when you create a rule which will set the value of an input in a step, the input being set should be set to Read Only (when it is originally defined). Alternatively, you can create a **Disable This Control** rule and set criteria which will change the input to read only during Wizard runtime.

Rule: Set This Control

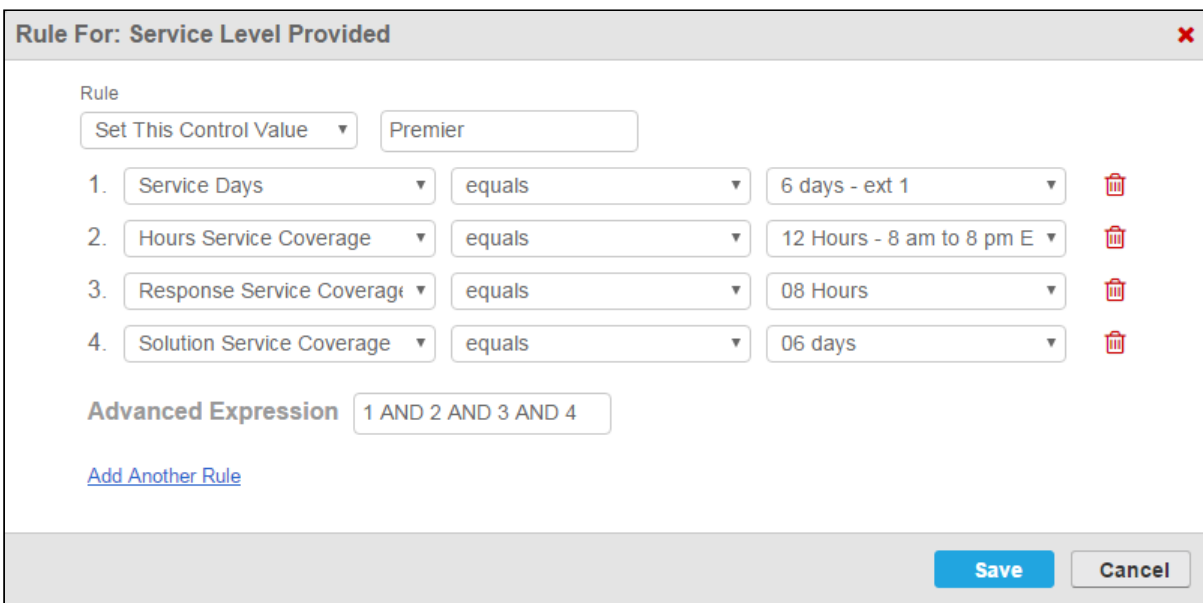
Service Level Provided is an input control defined using an object field. This field is a picklist on the Agreement record with three possible values:

- 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

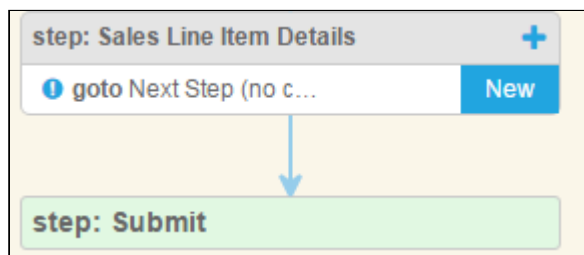
The final example for this wizard demonstrates one of the options for creating a step rule which determines the action(s) taken when a user clicks **Submit** following the last step of a Wizard.

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.

Rule Information

Name R-1357
 Sequence 1
 Rule Type Submit Request Mode
 Rule Value Auto
 Rule Description
 Active

Inclusion Criteria

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

Filter Criteria

| Field | Operator | Value | |
|-----------------|----------|----------|-----|
| Status Category | equal to | Request | AND |
| Service Level | equal to | Standard | |

The Agreement record of type Primary Sales Contract is created and the user is redirected to the newly-created record details page.

| Notes & Attachments | | New Note | | Attach File | | View All | | Notes & Attachments Help | |
|--|------|-----------------------------|--|-------------|-------------------|----------|------------|--------------------------|--|
| Action | Type | Title | | | Last Modified | | Created By | | |
| Edit Del | Note | A - Business Wizard 1 Notes | | | 12/3/2015 3:08 PM | | | | |

| Document Versions | | | | | | | New Document Version | | Document Versions Help | |
|--|-------------------------|-------------|---------------|------------------|----------------|--------------------------|--|--|------------------------|--|
| Action | Name | Checkout By | Checkout Date | Last Modified By | Latest Version | Is Transient | Title | | | |
| Edit Del | Auto Generate Agreement | | | | 1.0.0 | <input type="checkbox"/> | a01A000000NFE0_Original_NK_TestTemplate_2015-12-03.doc | | | |

| Activity History | | Log a Call | | Mail Merge | | Send an Email | | View All | | Activity History Help | |
|--|--|------------|------|------------|-------------|-------------------------|--|----------|--|-----------------------|--|
| Action | Subject | Name | Task | Due Date | Assigned To | Last Modified Date/Time | | | | | |
| Edit Del | Email: Agreement a01A000000NFE0 with Account Acme 1 has been created and is attached for your review | Tester Ram | ✓ | 12/3/2015 | | 12/3/2015 3:09 PM | | | | | |
| Edit Del | Generated Agreement | | ✓ | 12/3/2015 | | 12/3/2015 3:09 PM | | | | | |
| Edit Del | This record was created from Wizard A - Business Wizard 1 Runtime a0eA00000075m2vIAA | | ✓ | 12/3/2015 | | 12/3/2015 3:08 PM | | | | | |

A number of actions take place as a result of Wizard submission and the Submit Request rule:


- A note is added to **Notes & Attachments** related list with details about the Wizard which created the record.
- The document is automatically generated from the Submit Request and is attached to the **Document Versions** related list (the document is here because Contract Document Versioning has been enabled for this org. If it is not enabled, the document would be attached to Notes & Attachments instead).
- Activity History shows which Wizard created the record (this is the same information as the note attached to N&A), the "Generated Agreement" activity, and an Email Template Agreement Rule creates and attaches an automatic email to specified recipients.

The Wizard is now complete and submitted. This example shows one of many outcomes which can occur when the user clicks **Submit**. Refer to [Configuring Wizard Step Rules](#) for more information on creating well-formed rules for your Wizards!

Configuring Wizards as Self-Service with Salesforce Sites and Communities

When you want to provide the ability for partners or other parties to run existing wizard designs created in your organization (or to create Wizards of their own), you must configure a method to make your runtime wizards externally facing. The Wizard Designer and Wizard Runtime pages are normally only available to users within your organization and for those who have proper permission extended to Wizard objects.

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.

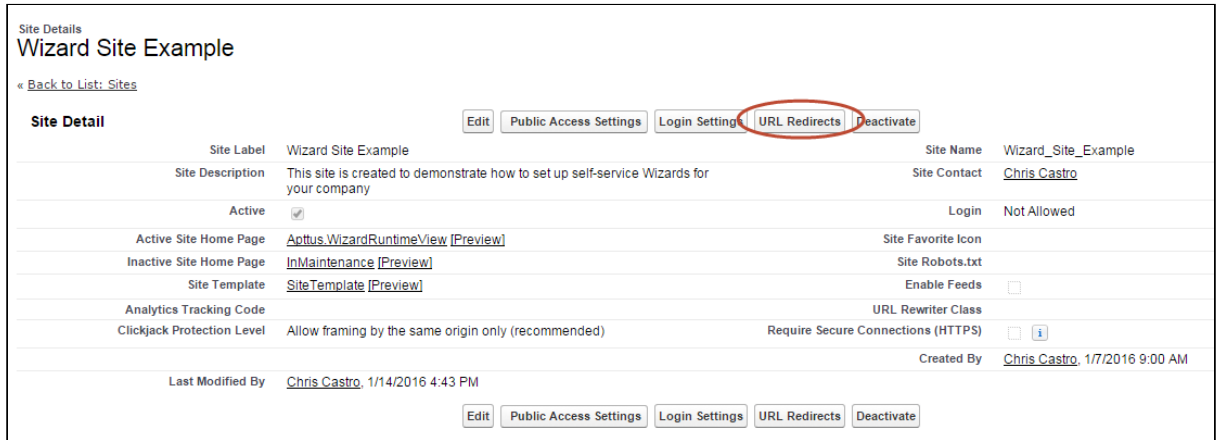
Configuring Sites for a Specific Runtime Wizard

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:

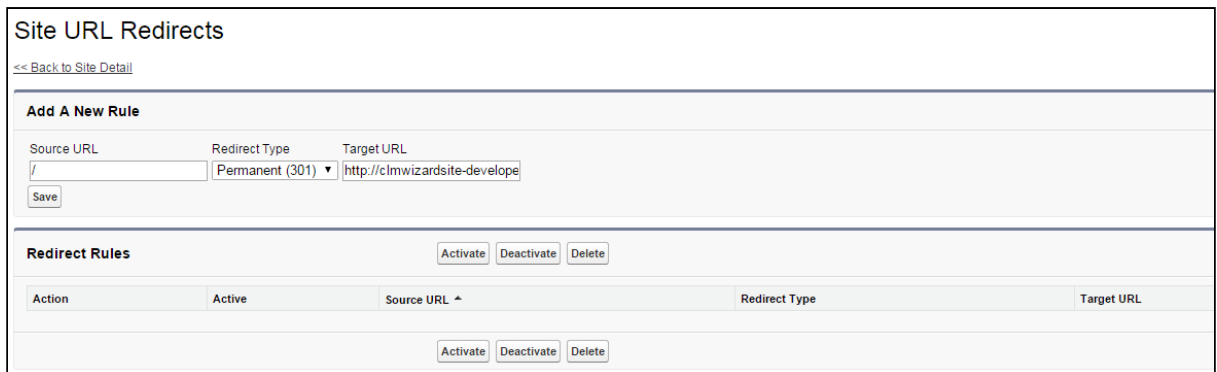
1. Go to the Site Details page.

2. Click on **URL Redirects**.



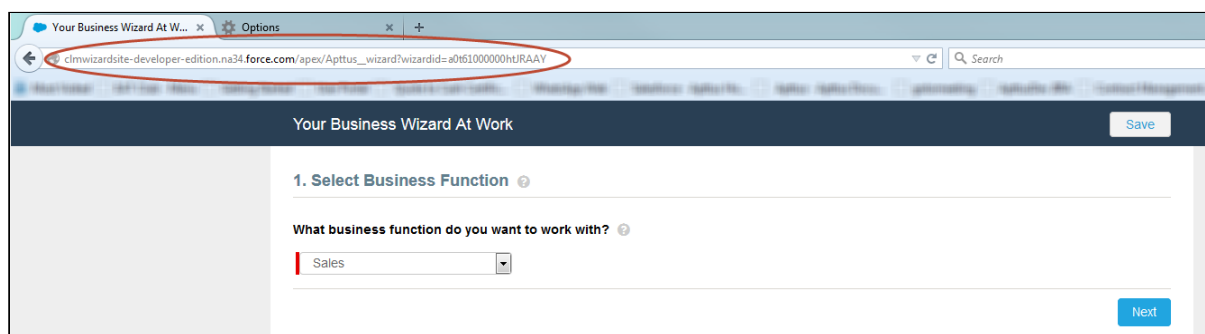
3. Enter the following to add a new redirect rule:

- **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](#).


i The following pages and sections provide instructions for enabling Self-Service Wizards by creating a new community and assigning members to the Community. While you can create communities for both customers and partners, the instructions provided use customer members as an example. The process for partners is almost identical, but differs slightly. Where the process differs the documentation will provide guidance.

To properly set up Self-Service Wizards using Communities, perform the following steps:

1. Enable Communities in your org and choose a domain.
2. Create a Community for Self-Service Wizards.

3. Create/Modify User Profile(s) to be used in the Community.
 - a. Add custom object permissions to Wizard-related objects.
 - b. Add field-level security privileges for Wizard-related objects.
4. Create Contacts and Enable as Customer or Partner Users.
5. Add Members to the Community.
6. Add Wizard tab to the Community.
7. Activate the Community.

Creating Your Community

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

Enabling Communities

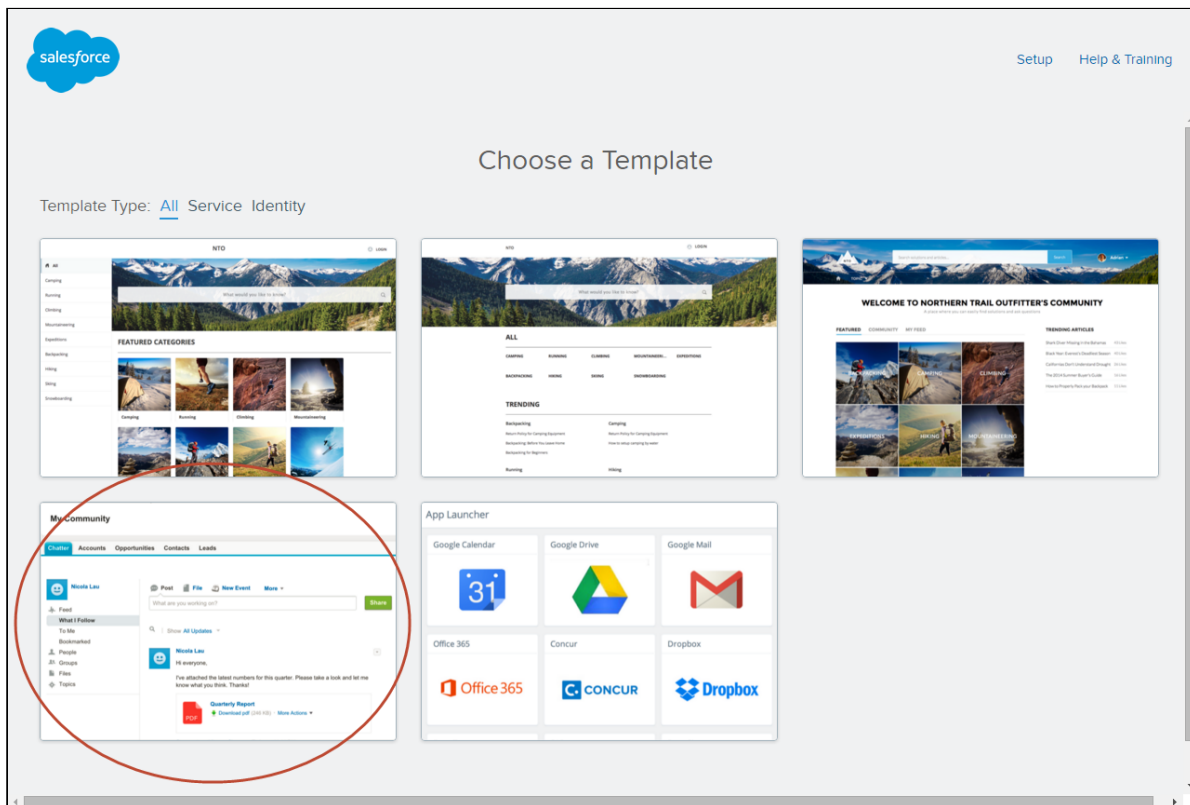
 *If Communities is already enabled for your org, skip this step.*

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).

The screenshot shows the Salesforce 'Name Your Community' configuration page. The Salesforce logo is in the top left, and 'Setup Help & Training' is in the top right. The main heading is 'Name Your Community'. Below it is a helpful message: 'Not sure what to enter? Don't worry—you can always change it later.' The form contains two fields: 'Name' with the text 'Wizards' and 'URL' with the text 'aptuswizards-developer-edition.na34.force.c... wizards'. At the bottom right, there are two buttons: a light blue 'Previous' button and a dark blue 'Create Community' button.

5. Click **Create Community**. Your community has been created and is now ready to be configured for Self-Service Wizards.

Configuring Users for your Community

In order for users to have access to both your community and Wizards, you must complete the following steps:

1. Create a user profile for your community OR modify an existing user profile
2. Add custom object permissions to the profile(s) for Wizard-related objects
3. Add field-level security permissions to the profile(s) for Wizard-related objects
4. Create customer/partner users as contacts and enable as community users
5. Add members to your Community

i The following sections use a Customer Community profile as an example, but you can also create a Partner Community profile. The only major differences are the type of *license* chosen when creating the profile and any users created for the profile must be associated with *partner accounts*.

Creating a User Profile

i The following section provides instructions for creating a user profile for use with your Community specifically for the use of running Wizards. If you decide you want to clone and/or modify an existing user profile for use with your Community, you can skip this step, but make sure the user profile you have chosen is assigned a Partner or Community license.

1. Go to **Setup > Manage Users > Profiles**.
2. Click **New Profile**. The Clone Profile page is displayed.
3. Choose an Existing Profile enabled for Salesforce Communities: **Customer Community User** or **Partner Community User** (Customer Community User is used in the examples on this page).
4. Enter the name for the user profile you want to create and click **Save**.

Adding Custom Object Permissions for Wizard-Related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Click **Edit** on the Profile Details page.
3. Under **Custom Tab Settings**, change the Wizards tab to **Default On**.

| Custom Tab Settings | |
|-----------------------------------|---------------|
| About | Default On ▼ |
| Admin | Default On ▼ |
| Agreement Document Output Formats | Default On ▼ |
| Agreement Explorer | Tab Hidden ▼ |
| Agreement Protection | Default On ▼ |
| Agreement Rules | Default On ▼ |
| Agreements | Default On ▼ |
| Configurable Wizard | Default On ▼ |
| Cycle Time Groups | Default On ▼ |
| Doc Assembly Rulesets | Default On ▼ |
| Formula Fields (Comply) | Default On ▼ |
| Publish Templates | Default On ▼ |
| Purge Agreements | Default On ▼ |
| Query Templates | Default On ▼ |
| Retention Policies | Default On ▼ |
| Search Filters (Comply) | Default On ▼ |
| Templates | Default On ▼ |
| Term Exceptions | Default On ▼ |
| Wizard Component Library | Default Off ▼ |
| Wizard Designs | Default Off ▼ |
| Wizards | Default On ▼ |

4. Under **Custom Object Permissions** grant Read, Create and Edit permissions to the following objects: *Wizards*, *Wizard Input Controls*, *Wizard Runtime Inputs*, and *Wizard Steps*.

| | Basic Access | | | | Data Administration | |
|------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|---------------------------|-----------------------------|
| | Read | Create | Edit | Delete | View All <small>i</small> | Modify All <small>i</small> |
| Wizards | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Designs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Designs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Input Controls | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Input Controls | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Input Control Runtime | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Input Groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Rules | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Rules | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Rulesets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Rulesets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Ruleset Runtime | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Runtime | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Runtime Inputs | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Steps | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wizard Steps | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. Click **Save** to return to the Profile Details page.

Adding Field-Level Security for Wizard-related Objects

1. Go to **Setup > Manage Users > Profiles** and click on the profile you just created.
2. Under **Field-Level Security > Custom Field-Level Security** click the View link for the *Wizard* object.

| Custom Field-Level Security | |
|--|--------|
| Account Hierarchy | [View] |
| Admin | [View] |
| Agreement | [View] |
| Agreement Action Condition | [View] |
| Agreement Clause | [View] |
| Agreement Document | [View] |
| Agreement Document Output Format | [View] |
| Agreement Explorer | [View] |
| Agreement Hierarchy | [View] |
| Agreement Line Item | [View] |
| Agreement Lock | [View] |
| Agreement Protection | [View] |
| Agreement Rule | [View] |
| Agreement Rule Condition | [View] |
| Agreement Term Exception | [View] |
| Async Merge Call | [View] |
| Content Event | [View] |
| Cycle Time Field | [View] |
| Cycle Time Field Data | [View] |
| Cycle Time Group | [View] |
| Cycle Time Group Data | [View] |
| Doc Assembly Component | [View] |
| Doc Assembly Rule | [View] |
| Doc Assembly Ruleset | [View] |
| Document Version | [View] |
| Document Version Detail | [View] |
| Formula Field (Comply) | [View] |
| Merge Event | [View] |
| Merge Event Detail | [View] |
| Query Template | [View] |
| Query Template Filter | [View] |
| Query Template Qualifier | [View] |
| Related Agreement | [View] |
| Retention Policy | [View] |
| Search Filter (Comply) | [View] |
| Template | [View] |
| Template Clause Reference | [View] |
| Template Datasource Filter | [View] |
| Template Dynamic Section | [View] |
| Temp Object (Comply) | [View] |
| Term Exception | [View] |
| Wizard | [View] |
| Wizard Design | [View] |
| Wizard Design (Deprecated) | [View] |
| Wizard Input Control | [View] |
| Wizard Input Control (Deprecated) | [View] |
| Wizard Input Control Runtime(Deprecated) | [View] |
| Wizard Input Group (Deprecated) | [View] |
| Wizard Rule | [View] |
| Wizard Rule (Deprecated) | [View] |
| Wizard Ruleset | [View] |
| Wizard Ruleset (Deprecated) | [View] |
| Wizard Ruleset Runtime (Deprecated) | [View] |
| Wizard Runtime (Deprecated) | [View] |
| Wizard Runtime Input | [View] |
| Wizard Step | [View] |
| Wizard Step (Deprecated) | [View] |
| Wizard Step Runtime (Deprecated) | [View] |

- Click on each checkbox under the **Visible** column to enable visibility for all fields in the list.


| Wizard Field-Level Security for profile Test Customer Community User | | | |
|---|------------|-------------------------------------|-------------------------------------|
| Field Name | Field Type | Visible | Read-Only |
| Action | Text | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context Id | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Context Type | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By | Lookup | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| External Id | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By | Lookup | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner | Lookup | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Status | Picklist | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Submitted By | Lookup | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Wizard Design | Lookup | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Wizard Name | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- Click **Save** to return to the Profile Details page.
- 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 to enable the contact as a Partner User only if the account assigned to the contact has been enabled as a Partner Account. Also keep in mind that when you assign a profile to the user it must use be a Partner profile (using a Partner Community license) instead of a Customer profile.

3. Enter all required information for your new Community user, including:
 - **Email** - the actual email of the user who will logging in to your community (if you have not yet activated the community, choose an email address controlled by your organization—see below)
 - **Username** - the Username for this user will be what they use to log in to your Community portal (e.g., "wwizard@wizarduser.com").
 - **User License** - the "Customer Community" user license (or "Partner Community" if you are creating a Partner User).
 - **Profile** - the User Profile you created in the previous section.

- Click **Save** to create the new user. An email notification is sent to the email address provided in the New User form to complete registration for their account.

⚠ During initial setup of your community before it is activated, it is recommended to create a user password from an email address controlled by you or your administrator. After the community has been activated, any new users created in this way can complete the registration process from their own email address.

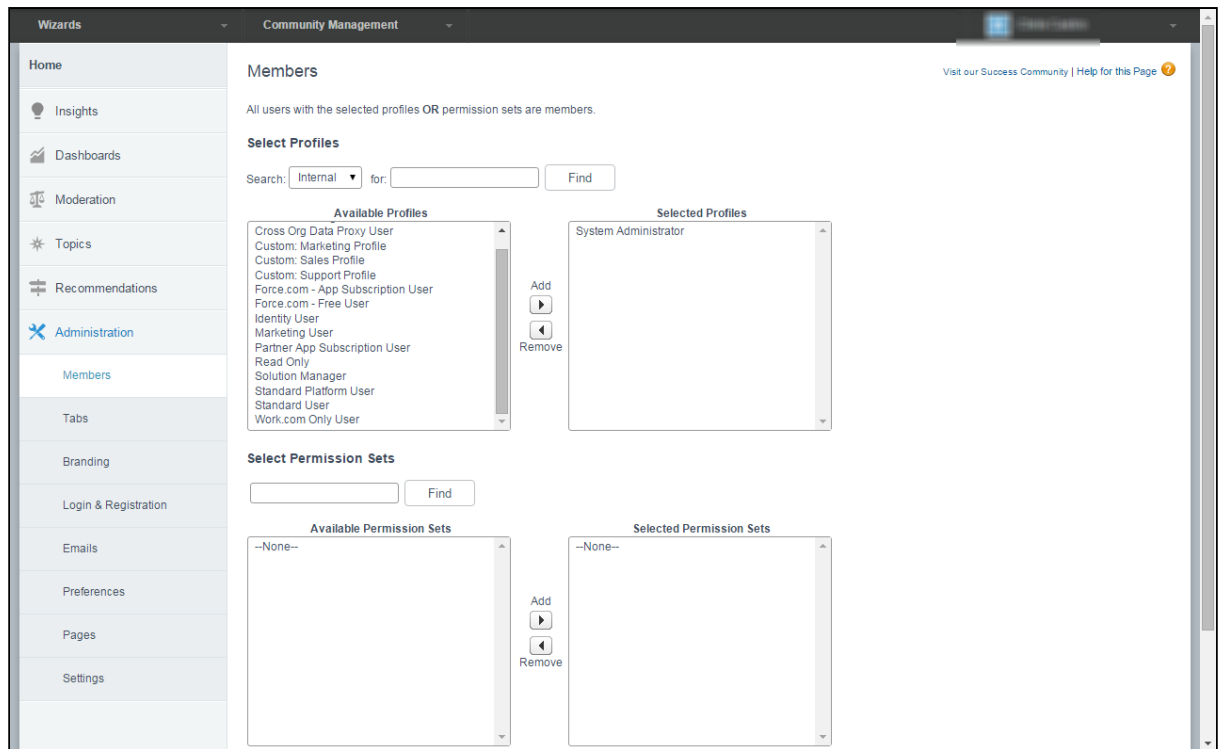
- Return to the detail page for your contact. Click on **Manage External User** and choose **View Customer User**.
- Scroll to the **Managed Packages** section and click on **Assign Licenses**.

- 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).

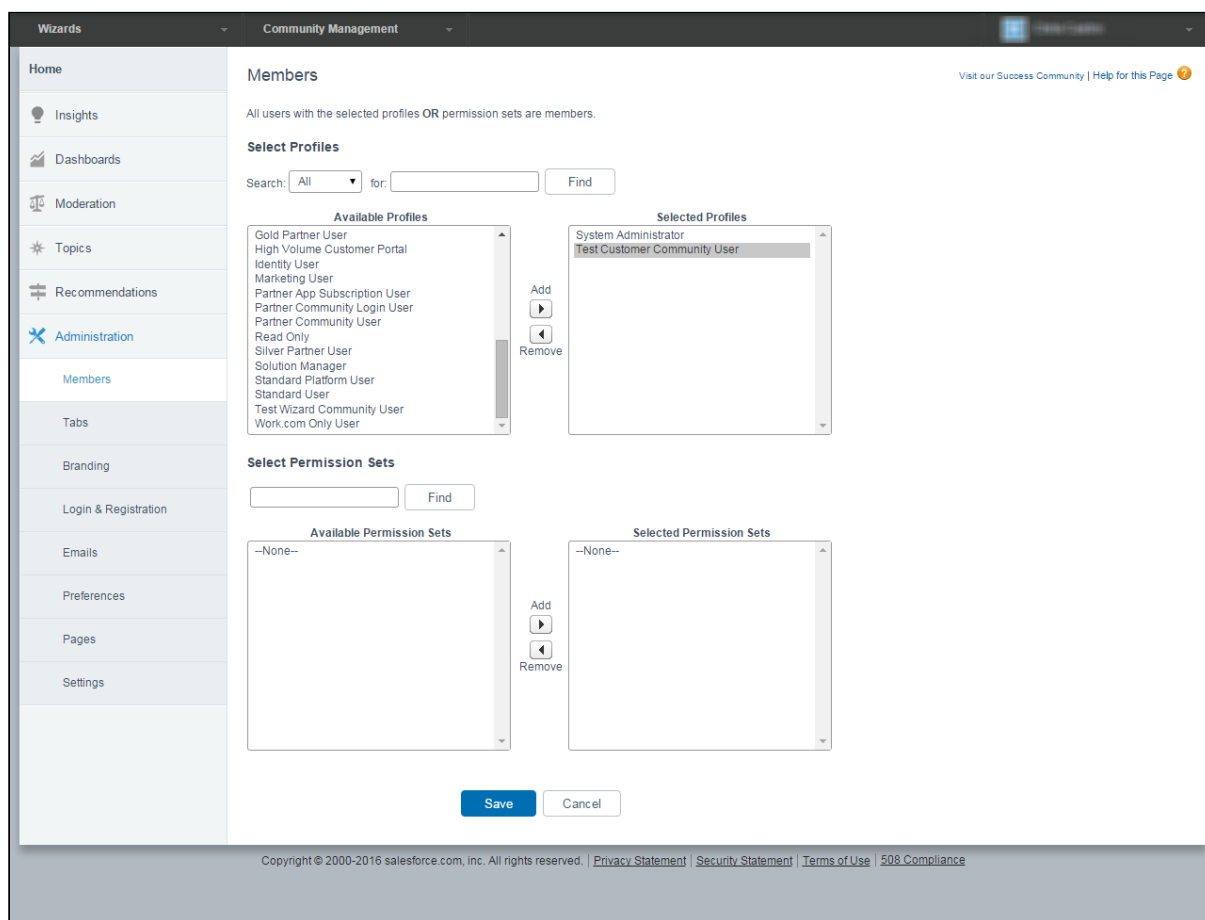
Adding Members to Your Community

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

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

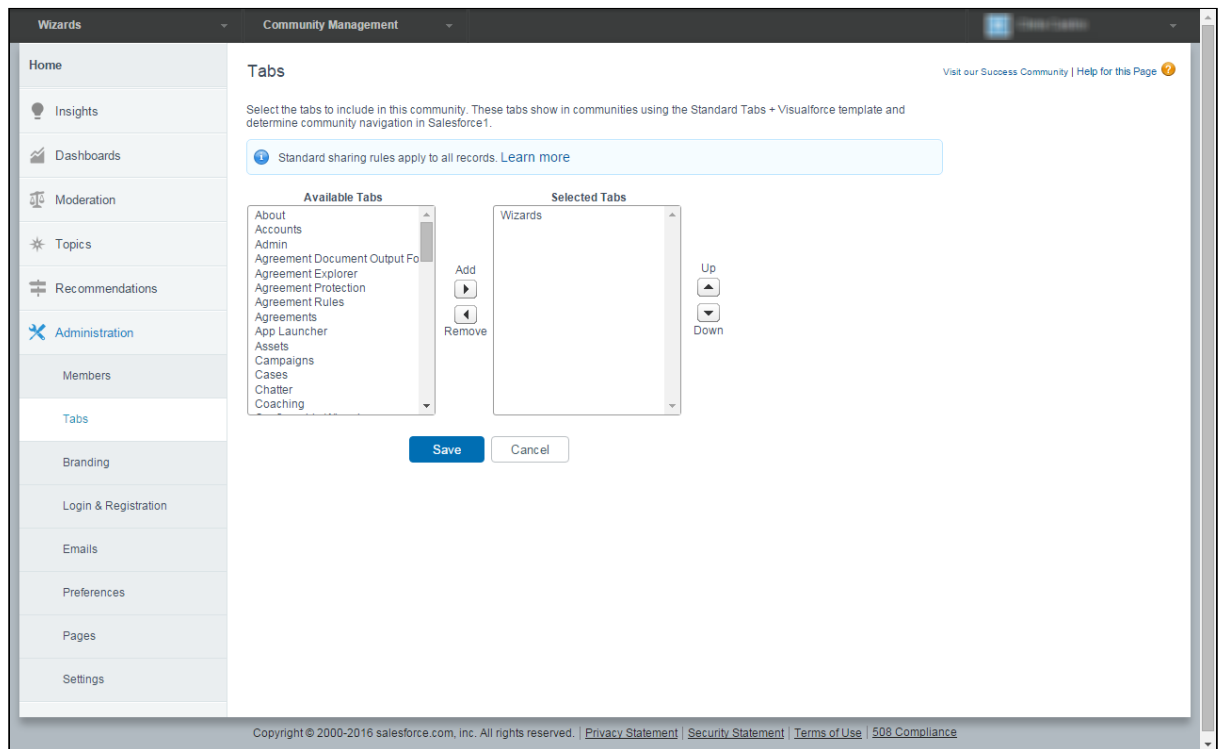
To complete the process of enabling Self-Service Wizards as a Community, you need to complete Community configuration and activate the Community itself. Much of Community Management is left up to your organization—how you customize, which Dashboards and Reports you expose, how you brand your site, is 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.

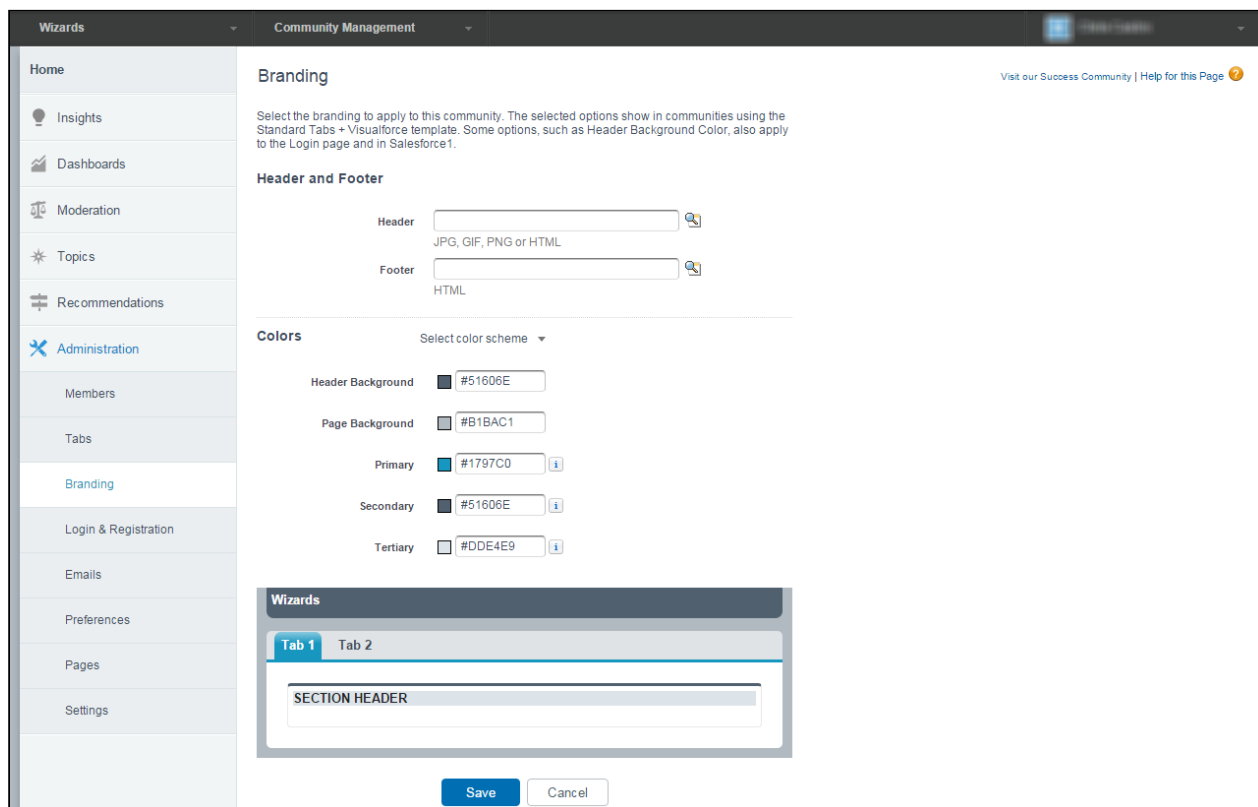


5. Click **Save**.

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.

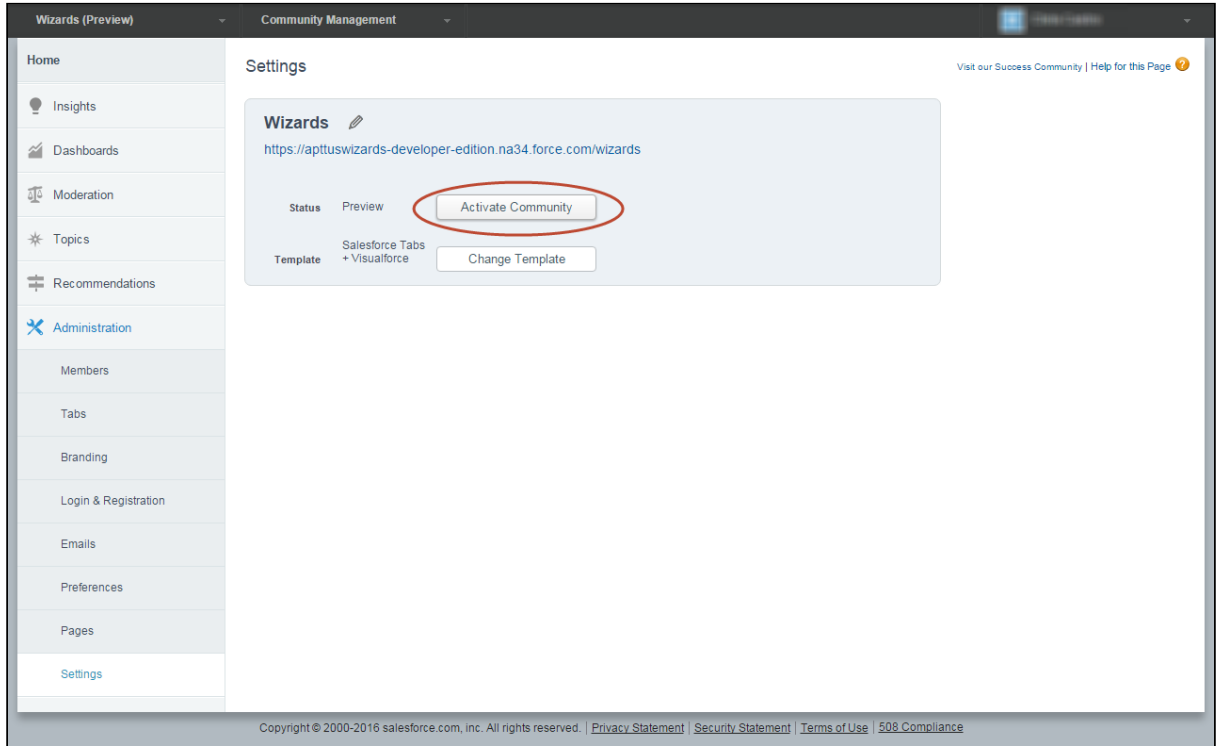


i Note that the branding offered in Community Management differs from branding added to Wizard designs when they are created. With the Wizard Designer, you can add branding to both the Wizard banner and individual Steps of your runtime Wizards. For more information on adding branding and logos to your 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 | <pre>{"action":"onwizardnext","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA","stepDesignId":"a2EM0000000XZSkMAO","stepDesignName":"SDProposal-1-25"}}</pre> <p>When the next page is the Wizard "Review" page (in this case, the stepDesignId is "Null" and the stepDesignName is "Review" as this is the last page of the Wizard and not a design-defined step):</p> <pre>{"action":"onwizardnext","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmdOIAQ","stepDesignId":"","stepDesignName":"Review"}}</pre> |
| onwizardback | Back | wizardDesignId, wizardDesignName, wizardId, stepDesignId, stepDesignName | <pre>{"action":"onwizardback","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA","stepDesignId":"a2EM0000000XZSkMAO","stepDesignName":"SDProposal-1-25"}}</pre> |
| onwizardsubmit | Submit | wizardDesignId, wizardDesignName, wizardId | <pre>{"action":"onwizardsubmit","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA"}}</pre> |
| onwizardabort | Abort | wizardDesignId, wizardDesignName, wizardId | <pre>{"action":"onwizardabort","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd9IAA"}}</pre> |
| onwizardsstart | Start | wizardDesignId, wizardDesignName, wizardId | <pre>{"action":"onwizardsstart","data": {"wizardDesignId":"a29M0000000rSWVIA2","wizardDesignName":"SDProposal-1-25","wizardId":"a28M0000001bmd4IAA"}}</pre> |

Use the event notification data from your embedded Wizards to drive functionality in your application. For example, each "Next" event in the Wizard could trigger your application to add or display a new tab to the user.

Configuring Meta Property Field Sets for Set Custom Value Rules

The "Set Custom Value" step input rule in the Wizard Designer allows you to set the value for special purpose custom fields to permit more conditional logic and data to be captured by the Wizard. These custom fields are added to the Wizard using a `MetaPropertyFieldset` on the Wizard Runtime Input object. While other rules created in the designer rely on the context object for the agreement or step (e.g., Agreement, Account, Quote/Proposal, etc.), meta properties can be considered and evaluated for any step in the Wizard design, determined specifically by implementation of the Set Custom Value input rule, allowing Wizards to capture additional information at runtime that can be used for a purpose beyond manipulating or using Salesforce data.

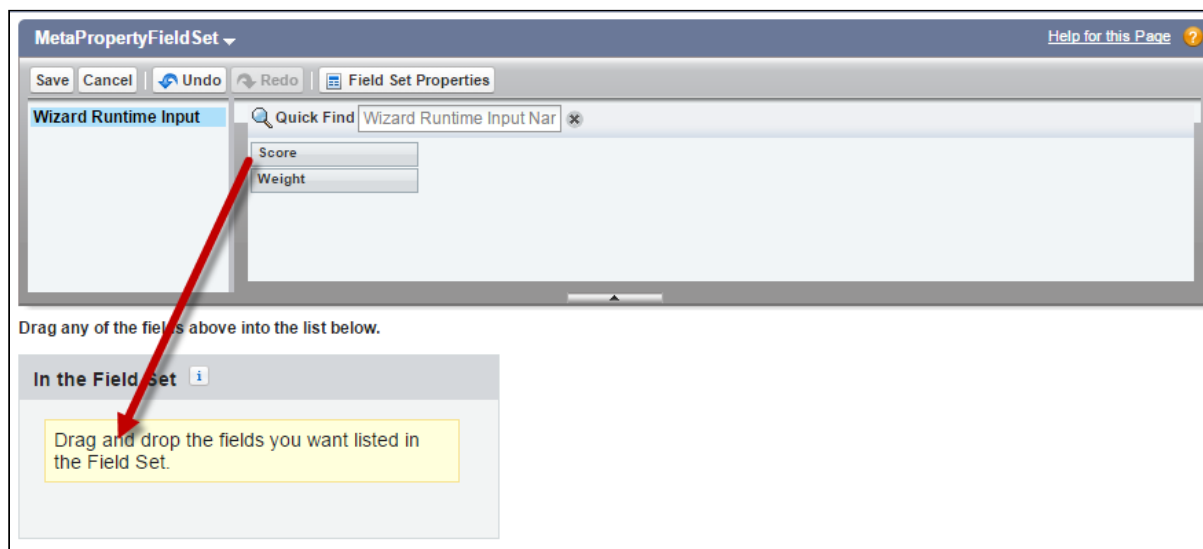
Packages which use the wizard typically create the custom fields and implement them as these meta properties to be used by the Wizard objects. You can also manually add custom fields to the Meta Property Field Set.

Prerequisites

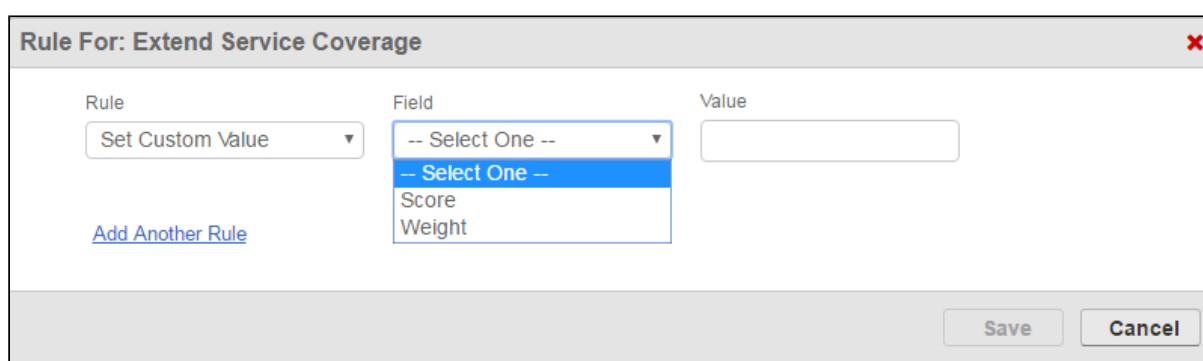
Before you can configure the `MetaPropertyFieldSet` you must define custom fields on the Wizard Runtime Input object to add to the field set. In the steps below, two custom fields, Score (`Score__c`) and Weight (`Weight__c`) were created to be used as meta properties.

To configure Meta Properties

1. Go to **Setup > Create > Objects > Wizard Runtime Input**.
2. Hover over the [Field Sets](#) link and click **Edit** next to the `MetaPropertyFieldSet` record.
3. Drag and drop the fields you want to use in the Wizard into the list below the field set pane. You can add the fields to the list in any order.



4. After adding all fields to the Field Set, click **Save** in the MetaPropertyFieldSet pane. The custom fields in the Field Set are now available to Wizard Designers as Fields on the **Set Custom Value** Wizard Step Input Rule.



i Only one MetaPropertyFieldSet is available for all Wizard designs. Add as many meta properties as needed to the field set and use only the ones you want for specific input rules. All other fields will be ignored during wizard runtime.

Auto-Populating Wizard Fields at Runtime

Occasionally business requirements may require responses in Wizards to be auto-populated when the Wizard is first launched. Circumstances may dictate that fields for a particular Wizard are always populated for reasons such as the following:

- Object field values for the Wizard should always be the same (e.g., an Agreement-creation Wizard that will always have the same Account and Opportunity names filled in for certain steps).
- Wizard Input or Object Field values should always match every new Wizard of the same design (e.g., multiple surveys/questionnaires for each line item in a Cart line that should share the same responses based on a previously completed survey).

There are two primary methods provided in Wizard Design for auto-populating fields during Wizard runtime:

- passing record IDs as parameters when the Wizard launches to auto-populate Object fields.
- implementing a special DataSource callback class that fetches data from one runtime Wizard to populate other Wizards of the same design.

i Note that while the above functionality exists out-of-the-box, use of this feature requires a custom implementation for initiating auto-populated Wizards. Also note that compound and read-only fields cannot be auto-populated at this time.

Auto-populating Wizard Fields using Record ID

To auto-populate fields based on record ID(s) every time a new instance of the Wizard is launched, you need to pass Object record IDs as parameters when the Wizard is launched. In most cases, this implementation will use something like a formula field, which captures the desired record IDs and includes them in the URL when the Wizard is first launched.

Consider a simple agreement creation Wizard. Your requirement include auto-populating the initial steps of the Wizard with details from the associated Account and Opportunity, which will be the same for every instance of the Wizard. Rather than having the Wizard user enter these values every time the Wizard is run, you want them to be automatically filled when the Wizard is launched.

- To use this method, the inputs you want to be auto-populated must be Object fields that match the types of records you are passing as parameters. In this example, the designer creates an input for Account > Account Name.
- In the next step, the designer creates an input for Opportunity > Name.
- As these are pre-existing objects in the same org, it's easy to retrieve record IDs to pass to the Wizard when it is launched. How the record IDs are passed to the Wizard depends on your integration with 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://aptus-wizard.na34.visual.force.com/apex/aptus_wizard__wizard?wizardid=a11610000016K6fAAE

where "**wizardid=a11610000016K6fAAE**" is passing the Id of the runtime wizard. Your solution should append recordIDs corresponding to the Object where the fields reside and which match the Object of the fields you want to auto-populate.

Returning to the above example, you can auto-populate fields in the Wizard using specific Account and Opportunity record IDs. To see this in action:

1. Go to the **Wizards** tab and launch the Wizard you want to auto-populate. Note the Wizard runtime URL.
2. Open another tab and go to the Account which contains the data you want to capture. Copy the Account Record ID from the URL.
3. Return to the Wizard runtime and append the URL with the Account Record ID, using proper syntax to pass it as a parameter (e.g. "&recordIds={Account_Id}").
4. Repeat steps 2-3 for the Account Opportunity. Comma-separate multiple record IDs.
5. Press Enter. Fields which have values on the Objects corresponding to the record IDs you passed will be automatically populated with data across multiple steps, wherever they appear in the Wizard.
6. Follow this format for your integrations. Using this method, you can easily construct a formula field to pass these parameters from your Wizard launch point and auto-populate data for your users.

Auto-populating Wizard Fields using a Datasource Callback

When you need to build the ability to auto-populate fields in Wizards based on previously entered responses for your integration, you should use the Datasource Callback method. This method also requires passing data to the Wizard as in the previous section, but in this case it is retrieving data from one completed Wizard and using that data to populate newly-invoked Wizards that use the same design.

Wizard Runtime JSON Structure

To properly understand the format of the data returned by the callback to auto-populate a Wizard, let's take a look at a sample JSON structure created from a Wizard step with 2 responses:

Sample JSON: Auto-Populate

```

{
  "UserResponses": [{
    "Question": "sample question - 1",
    "ObjectName": null,
    "Notes": [],
    "metaPropertyFields": null,
    "inputRepeatSequence": 0,
    "inputControlId": "a0236000002LN1DAAW",
    "FieldName": null,
    "FieldClass": null,
    "Comments": "",
    "Attachments": [],
    "Answer": "sample answer - 1"
  }, {
    "Question": "sample question - 2",
    "ObjectName": null,
    "Notes": [],
    "metaPropertyFields": null,
    "inputRepeatSequence": 0,
    "inputControlId": "a0236000002LN1EAAW",
    "FieldName": null,
    "FieldClass": null,
    "Comments": "",
    "Attachments": [],
    "Answer": "sample answer - 2"
  }],
  "Parameters": null
}

```

When using the callback method to auto-populate fields in a runtime Wizard, the method should return a string using a similar JSON structure as shown in the example above. The values in the JSON string auto-populate the fields when the Wizard is invoked.

The parameters described in the following table are relevant for Callback implementations to auto-populate questions/responses in the Wizard:

| Parameter | Value | Description |
|---------------------|---|---|
| Question | Object/Wizard Input field name | Provide the name of the field in the Input Control as defined (e.g., "AccountName" or "OppName") |
| inputControlId | Id string of Input Control | Provide the Id string of the input control to be auto-populated (e.g., "a1561000001dXHf") |
| Answer | Field or Response value | Provide the value to auto-populated as in the Wizard field/response (e.g. "Tier One Systems") |
| inputRepeatSequence | Numeric sequence for repeatable Wizard Input Controls | If the Wizard step uses a "Repeatable" layout for an input, Provide a numeric value to represent each occurrence (e.g., first occurrence is "inputRepeatSequence:" 0, next occurrence is "InputRepeatSequence:"1, etc.) |

Implementing a Datasource Callback

The data captured from the previously completed wizard can be from Wizard Input Fields or Object fields. For your integration, you must create a DataSource Callback class that passes this retrieved data to the new Wizard runtime instance. The process works as follows:

- A custom Data Source callback class is created to implement the DataSource Callback interface *WizardCustomClass.IDataSourceCallback*.
- The DataSource Callback class calls a custom `getData()` method that takes the Wizard Design ID as the primary parameter and a map of parameters passed to the Wizard design.
- The `getData()` method is used to define values for specific runtime input controls in the Wizard design (questions, answers and values) and creates and returns a JSON string using the same structure interpreted by the Wizard.
- The Wizard Design using the DataSource Callback must have the class name defined in the Wizard Settings section of the Wizard Design.
- When a new Wizard is invoked, fields specified by the Callback method are auto-populated.

Use Case for Contract Wizard

This topic describes the use case for Contract Wizard.

Standard Statement

This use case gives one example on how to create user-friendly on-screen Wizards, to quickly create contracts. You might use this functionality differently, depending on your business case.

A Wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record. This use case describes how a non-expert user can use on-screen Wizards, to quickly create contracts.

In this case, ACME needs to provide Sales Representative with a quick and easy way to create Non-Disclosure Agreements.

Prerequisite: Make sure you have the followings:

- Inputs are created.
- Steps are created.
- All agreements must have the following fields completed: Agreement Name, Agreement Category, Account Name, Language, Status Category, Start Date, and Primary Contact.

To create inputs, perform the following steps:

1. Go to the **Apttus Configurable Wizard**.
2. Navigate to the **Wizard Component Library** tab.
3. Click **New Input Control**. Fill in the following fields, then **Save**.

| Field | Value |
|----------------------|--------------------------|
| Control Name | Account Name |
| Question/Instruction | Please select an Account |
| Field Class | Object Field |
| Object Name | Agreement |
| Field Name | Account |

4. Click **New Input Control**. Fill in the following fields, then **Save**.

| Field | Value |
|----------------------|--------------------------|
| Control Name | Start Date |
| Question/Instruction | Please select an Account |
| Field Class | Object Field |
| Object Name | Agreement |
| Field Name | Agreement Start Date |

You have successfully created all the inputs required to create the steps.

Inputs are placed in Steps. Steps can also contain rules that determine the flow and logic of the Wizard.

To create Steps, perform the following steps:

1. From the **Wizard Component Library**, click **New Step**.
2. Enter **Agreement Step 1** as the **Step Name**.
3. From the **Inputs Library**, drag and drop the following Inputs into the Inputs pane: Agreement Name, Account Name, Agreement Category.
4. Click the **Input Rules** tab at the top of the page.
5. Next, to **Agreement Name** click the **+**.
6. Select **Determine Focus Object** as the picklist value under Rule.
7. In the following picklist, select **Agreement**.
8. Click **Save**.
9. Click the **+** next to **Agreement Name**.
10. Select **Determine Record Type** as the picklist value under Rule.
11. Select **Agreement** in the following picklist.
12. Select **NDA-yourinitials** in the following picklist. Click **Save**.
For Agreement Step 1, you should now see two Agreement Name input rules (1.1 and 1.2).
13. Click **Save**.
14. Repeat steps 1 - 3 to create Agreement Step 2.
Use the following Inputs: Start Date, Status Category, Language, and Primary Contact.
15. Click **Save**.
You have successfully created the two steps for the Wizard.

With the Steps created, the Wizard can now be designed. The Wizard determines the specific process, the end-user will go through, based on **Steps** and **Inputs**.

To create a Contract Wizard, perform the following steps:

1. Go to the **Wizard Designs** tab.
2. Click **New Wizard Design**.
3. Enter **Agreement-yourinitials** as the Design Name.
4. From the **Steps Library**, drag and drop Agreement Step 1 and Agreement Step 2 into the **Steps** in the **Wizard** pane.
5. Click **Activate** twice.
6. Click **Cancel** to exit Wizard Designs.

Result:

You have successfully created the Wizard.

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 |

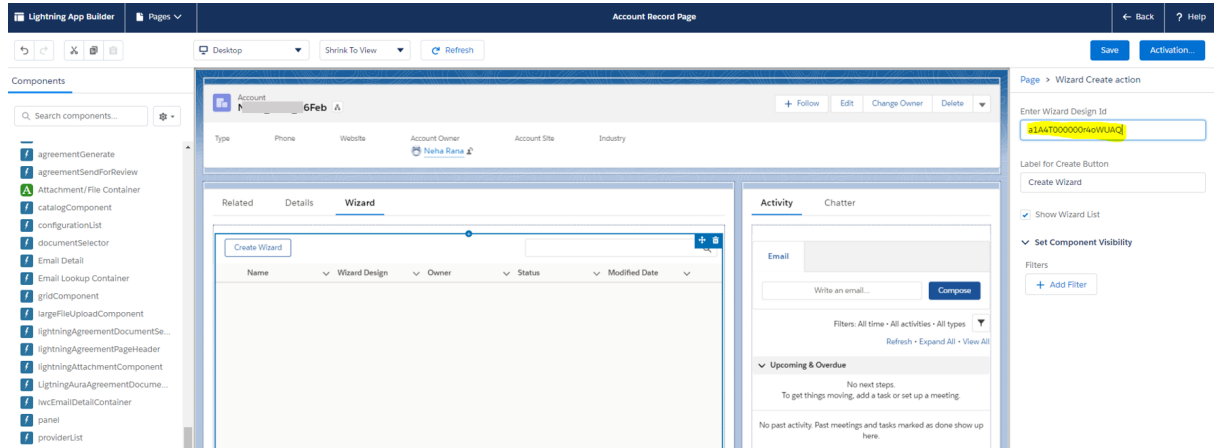
Configuring Wizard as a Related Tab

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.

Agreement Actions

Agreement Lifecycle Actions



Cancel



Send For
Signatures



Send For
Review



Activate

Document Actions



Generate
Supporting
Document



Regenerate



Import
Offline
Document



Import
Supporting
Document



Merge
Documents

Additional Actions



View
Hierarchy

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 <input type="text" value="English"/>  |
| Translation Text | <input style="width: 95%;" type="text" value="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](#)

- [Comply System Properties](#)
- [Comply Custom Properties](#)
- [Custom Permissions](#)
- [CLM Glossary](#)
- [Frequently Asked Questions](#)
- [Conga CLM Limitations](#)
- [Comply User Properties](#)

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 behalf 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 <i>Enable Version Control</i> and <i>Enable Document Versioning</i>). | Checkbox | | | |
| Activate | Link to activate the agreement; Shown only in desired statuses. | Action | | | |
| Amend | Link to amend the agreement; Shown only for active agreements. | Action | | | |
| Cancel Request | | | | | |
| Expire | Link to expire the agreement; Shown only for active agreements. | Action | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|------------------------------|---|-----------|----------|---------------|----------|
| Generate | Link to generate agreement document using one of the templates in library. Shown only is appropriate agreement statuses. Attaches generated doc under Notes & Attachment and creates 3 tasks. Write activity history. Changes status from "Request" to "In Signatures/Ready for signatures" | Action | | | |
| Generate Supporting Document | Link to generate supporting document using one of the templates in library. Shown only is appropriate agreement statuses. | Action | | | |
| Insert Offline Document | Link to add an external/offline document to the agreement record. Shown only is appropriate agreement statuses. | Action | | | |
| Preview | | Action | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|---------------------|---|-----------|----------|---------------|----------|
| Regenerate | Regenerate a new agreement doc using one of the templt 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 <i>Draft</i> version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the 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 | <p>Generates the first version of an agreement document and attaches a copy of the same to the agreement record.</p> <p>When you initiate the Generate action, you are navigated to an intermediary screen to select additional information about the document to be generated. Select 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.</p> <p>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.</p> <p>You can:</p> <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> • 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 (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects. |
| Availability | If Status Category = In Effect |

| | |
|--------------------|--|
| 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 (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects. |
| Availability | If Status Category = In Effect |
| 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 | <ul style="list-style-type: none"> • Sets Status to Cancelled Request • If an Amendment is being Cancelled, sets Status Category of Original Agreement to In Effect and Status to Activated |
| Comments | |

Agreement 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_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 would not be resolved to their values. For more information, see [Sending an Agreement Document for Parallel Review](#).

| | |
|--------------|------------------------------|
| 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 [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_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 | <p><Object_API_name=<Batch Size>></p> <p>Sample code:</p> <p>Apttus_QPConfig__ProposalLocation__c=5 QTC_Proposal_Related_Line_Item_c=1000</p> |

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;mca |
| 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.

 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 | <code>APTS_SkipRemoveDraftDocumentOnActivation</code> |
| 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 | <code>APTS_StatusCategoriesToExcludeForDocuSign</code> |
| 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 | <code>APTS_StatusCategoriesToIncludeForDocuSign</code> |
| 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 | <p>Sample Code:</p> <pre><UIPageConfig> <UIAction name="publish_document"> <CustomPage> <Name>Apttus__PublishDocument</Name> </CustomPage> </UIAction> <UIAction name="publish_content"> <CustomPage> <Name>Apttus_Content__PublishContent</Name> </CustomPage> </UIAction> <UIAction name="publish_chatter"> <CustomPage> <Name>Apttus__PublishChatter</Name> </CustomPage> <UIAction name="review_offlinedocument"> <CustomPage> <Name>Apttus__ReviewOfflineDocumentLightning</Name> </CustomPage> </UIAction> </UIPageConfig></pre> |

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 Sideload 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. <ul style="list-style-type: none"> • 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 | <p>Select this field to automatically insert the Agreement Number Field For Imported Docs field value to the header and the latest timestamp to the footer of an agreement document. This field is available for Generate, Import and Offline actions. For more information about when to use this field, refer to Agreement Number/Header Configuration.</p> <p>The value of the latest timestamp for the footer is taken from the User Account Timezone field on Salesforce.</p> |
| 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 | <p>Enter a recipient role (Contract Owner, Logged in XAC user or Both) to receive Asynchronous Check-in email notification.</p> <p>Supported Values: Contract Owner, Logged in XAC user, or Both</p> <p>Default Value: Both</p> |
| 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 Conventions | 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 | <p>Specify a value to apply a custom naming convention for all agreement documents at generation, check-in and signature events.</p> <p>The following attributes permitted when formulating a document naming convention are:</p> <ul style="list-style-type: none"> • %checkintype% • %action% • %templatename% • %user% • %timestamp% • %version% <p>Agreement attributes such as %:Name%. Note: any variable prefixed by ':' represents a field on the Agreement object.</p> <p>If the property contains a null value (i.e., if left blank), the current default naming convention will be used: %:Name%_%action%_%templatename%_%timestamp%</p> <p>Example agreement document name using the default naming convention: SOW_Regenerated_SOW ABC_2015-08-07</p> <p>For more information on using document version in document naming convention, refer to Enabling Contract Document Versioning.</p> |
| Document Structure FX2 For Imported Docs | <p>Check this box to make document structure FX2 format for all Offline documents (created or imported). If not checked, all offline documents are created in the "pre-existing" format.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Note</p> <p>This property only applies to Offline agreements created from the Agreement or user Home page links in Salesforce. The format of Offline agreements created using X-Author for Contracts will still depend on user-input from X-Author.</p> <p>You can import documents in X-Author for Contracts and Online Contract Collaboration when this property is enabled.</p> </div> |


| Property | Description |
|---|--|
| Email Template For Checkin Notification | The email template for sending check-in notifications. |
| Enable Clause Approvals | This checkbox allows you to set up approval processes on clauses used in your document. |
| Enable Document Versioning | <p>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.</p> <p>Enabling Document Versioning changes the value of the Version Aware Agreement field to TRUE for all new agreements after the property is activated. The Version Aware field is a flag that tells Conga CLM to use Document Versioning for a specific record.</p> <p>Important Note: It is recommended that once a record is flagged as Version Aware, you do not disable this field, as versioning will become undefined for the agreement record in question. Instead, ensure that records which should not use Document Versioning do not have the field enabled when they are created.</p> <p>For more information on how you can configure Document Versioning for your org, refer to Enabling Contract Document Versioning.</p> |
| Enable File | <p>Select Enable File checkbox to enable File Type to be visible in the Notes & Attachment section of an agreement.</p> <div data-bbox="328 1494 1426 1675" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Note</p> <p>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.</p> </div> |
| Enable Merge Call Debug | Enable Merge Service debugging. |

| Property | Description |
|--|--|
| 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. |
| 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 | <div data-bbox="328 1249 1426 1375" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p> This property only applies when you send documents for review using the new UI.</p> </div> <p>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.</p> |

| Property | Description |
|--|--|
| Footer Datetime Format For Imported Docs | <p>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.</p> <p>The value of the latest timestamp for the footer is taken from the User Account Timezone field on Salesforce.</p> |
| Hide Content Control Border | <p>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.</p> |
| Instance URL | <p>The Salesforce instance URL for redirecting to custom pages.</p> |
| Large Doc Process Batch Size | <p>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.</p> <p>The default value of the Large Doc Process Batch Size is <i>1000</i> and a maximum of <i>2000</i>. You can define a value lower than <i>2000</i>, based on template complexity.</p> <p>Sample value: 500</p> |
| Large Doc Threshold | <p>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.</p> <p>The default and the maximum value of the Large Doc Threshold is <i>10000</i>. You can define a value lower than <i>10000</i>. Setting a value of <i>-1</i> for the Large Doc Threshold invalidates the setting.</p> <p>Sample value: 1000</p> |
| Max Child Level | <p>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.</p> |

| Property | Description |
|---|---|
| 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 |
| 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. |

| Property | Description |
|------------------------------------|---|
| PDF Owner Password | <p>The password required to change the permissions of the PDF document like printing or editing.</p> <div data-bbox="328 434 1426 618" style="border: 1px solid #ccc; padding: 10px;"> <p> Note</p> <p>Note: If this password is not specified, the password configured for the Admin object "APTS_Password" is used instead. See Admin Objects.</p> </div> |
| Publish Author Events | <p>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.</p> |
| Publish Merge Events | <p>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.</p> |
| Restrict Checkin of Documents | <p>List of comma-separated Status category and Statuses for which Check-in and Check-out actions will be restricted in X-Author for Contracts.</p> <p>Sample value: In Authoring, Other Party Signatures, Submitted Request</p> |
| Temp Email Template Inactive Hours | <p>Use this property to set the orphan period of temporary email templates to use in conjunction with the CleanupJobScheduler APEX class. The default value of this property is set to 4 hours.</p> <p>For more information, refer to Temporary Email Template Cleanup.</p> |
| Unlock Smart Elements | <p>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.</p> |

| Property | Description |
|-------------------------------------|---|
| Use Agreement Locks for Versioning | <p>Check this box to use Agreement locks for versioning instead of document-level locking:</p> <ul style="list-style-type: none"> • If enabled, all agreement documents are locked (by the user checking out) when any one of them is checked out. • If disabled, only checked out documents are locked (by the user checking out)-any other agreement documents which have not yet been checked out can be checked out for editing. |
| 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 <i>Organization-Wide Email Address Display</i> comply system property to use an organization-wide email address. |
| XAJIS End Point | <p>Allows you to provide X-Author for Contracts 2.0 (XAJIS) URL to route the documents to intelligent data extraction software via XAJIS.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p> You need to configure the remote site setting of the org before you configure XAJIS End Point.</p> </div> <p>Value: https://xajs.apttuscloud.com</p> |

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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Update Current Version • With Redlines • Without Redlines |

| Custom Permission | Description |
|-------------------------|--|
| XA_CheckInWithRedlines | <p>This permission allows users to view the following save options on the Check-in document page:</p> <ul style="list-style-type: none"> • Update Current Version • With Redlines <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Irrespective of the user profile permissions, any user can check-in a document with redlines using X-Author for Contracts 1.0.</p> </div> |
| 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. |
| XA_disableautocheckout | <p>This permission when set to true disables the auto check out option for the user when they perform the following actions:</p> <ul style="list-style-type: none"> • 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 <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.</p> </div> |

| Custom Permission | Description |
|-------------------------|---|
| XA_hidecheckoutmenu | <p>This permission hides the Open and Open and Update option for the user.</p> <div data-bbox="638 436 1428 638" style="border: 1px solid #ccc; padding: 5px;"> <p> This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.</p> </div> |
| xa_unprotectdocument | <p>This permission allows users to view the document protection toggle button.</p> |
| xa_disableimportoffline | <p>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.</p> <div data-bbox="638 1025 1428 1227" style="border: 1px solid #ccc; padding: 5px;"> <p> This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.</p> </div> |
| xa_disablecreateoffline | <p>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.</p> <div data-bbox="638 1491 1428 1693" style="border: 1px solid #ccc; padding: 5px;"> <p> This custom permission is available to be configured in the APTS_ProfilePermissions admin entry. For more information, see Assigning Custom Permissions to User Profiles.</p> </div> |

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. |
| 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. |

| Term | Definition |
|----------------------------|--|
| 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. |
| Dashboard | Organizes key statistics in easy to understand, bottom-line format, allowing you to gain the insight you need to fulfill your business needs. |
| Document Finder | Helps your contract managers, sales persons, and legal teams to easily filter and find agreement documents directly from an agreement record. |
| Dynamic Document Assembly | Enables you to preconfigure filter rules that drive a sequence of prescribed dynamic clause or attachment insertions in a generated document. |

E

| Term | Definition |
|--------|---|
| Expire | The Expire action is used to mark the agreement as Expired after the agreement term ends. |

M

| Term | Definition |
|-------------------|--|
| Merge web Service | Three Merge Web Service APIs are used for generating and manipulating documents. |

O

| Term | Definition |
|------------------|--|
| Object | Is a definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce, such as Contacts or Accounts, while others are specific to 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. |

| Term | Definition |
|------------------|--|
| 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 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 |
| Read Only | Can view the organization's setup, run and export reports, and view, but not edit other records. |
| Requestor | Can initiate new contract requests and use the Contract Wizard to assemble standard contracts, but does not have access to X-Author. Can perform some limited searches and reporting |

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

Contract Management User Roles and Tasks

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

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

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) | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|--------------------|--|-----------|----------|---------------|----------|
| 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 |
| 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 |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|--------------------------|--|------------------------|----------|---------------|------------------------------|
| 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 | | | |
| 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) | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|-------------------------------|---|-----------------------|-----------------------|---------------|----------|
| Company Signed By | Link to contact record to identify internal signatory. | Lookup(Contact) | Yes | | |
| Company Signed Date | Date when internal signatory signed. | Date | Yes | | |
| Company Signed Title | Title of person signing on the behalf of Company. | Text(80) | | | |
| Contract Duration (Days) | The duration from Start Date to End Date in days. Shown when agreement is 'In Effect'. | Formula(number) | Yes | | |
| Contracted Days | Days from Contract Start Date to Current Date if the contract is In Effect and Start Date is set. | Formula(number) | Yes | | |
| Created By | User who created the record | Lookup(User) | Yes - System assigned | | Yes |
| Description | Detailed description of an agreement. | Long Text Area(32000) | Yes | | |
| Executed Copy Mailed Out Date | Date on which the final, executed copy was mailed out to the external party. | Date | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|------------------------------------|---|-----------|---|--------------------|------------------------------|
| Executed Date | This is a date field that is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all the recipients. A user can manually enter the date when the document has wet signatures and when the signed document is uploaded manually. | Date | | | |
| Initiation Type | To indicate whether this record is being filed as an executed agreement or is being negotiated in the system. | Picklist | Yes - System assigned | Negotiate Contract | Yes. Not changeable by user. |
| Internal Renewal Notification Days | Notification period prior to Renewal Notice Date when notification is sent out internally to indicate that renewal is approaching. Email alert needs to be setup, if needed. | Number | Yes | | |
| Internal Renewal Start Date | Auto populated with Date by which internal notice of internal renewal is approaching. It is calculated as Issue Renewal Notice Date minus Internal Renewal Notification days. | Date | Yes - System assigned, changeable by user | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|----------------------------------|---|-----------------|-----------------------|---------------|----------|
| 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 | | | |
| Other Party Signed Date | Date when external signatory signed. | Date | | | |
| Other Party Signed Title | Title of person signing on behalf 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. 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 | | | |
| 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 |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|---------------------------|---|---------------------|----------|---------------|----------|
| 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 | | | |
| 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) | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|---------------|--|--------------|----------|----------------|------------------------------|
| 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 | | | |
| 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 | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|-------------------------------|--|-----------------------|----------|---------------|------------------------------|
| Status Category | The higher level state of the agreement-In Authoring, In Effect, Expired, and more. These are reserved values. | Picklist | | Request | Yes. Not changeable by user. |
| Subtype | The subtype of the agreement for a given agreement type. The user specifies the values based on their agreement types. | Picklist (Default) | | | |
| Term (Months) | Identifies the term of an agreement, in months, from the Agreement Start Date. | Number | | | |
| 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) | | | |

| Field Label | Description | Data Type | Required | Default Value | Reserved |
|-------------|--|--------------|-----------------------|---------------|----------|
| 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 |

| Stage | Description |
|--------------------|---|
| Approved Request | Request approved |
| In Amendment | Contract being amended |
| In Clause Approval | Clauses are being approved <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Clause approval is triggered from Online Contract Collaboration. For more information, see Working with Clause Approvals.</p> </div> |

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 **Select Agreement 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.

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.

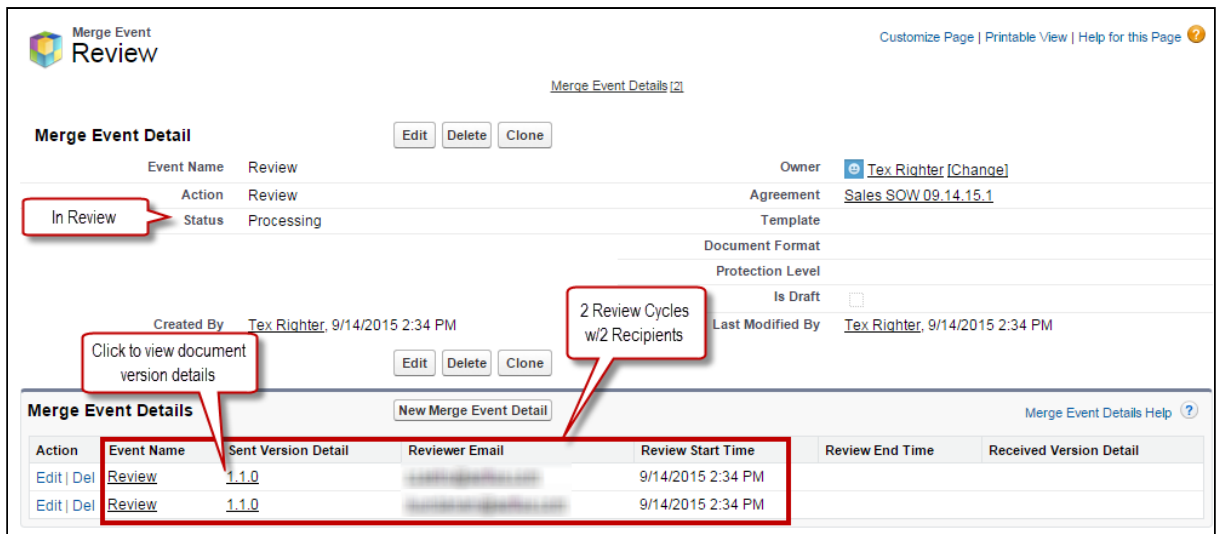
Tracking Reviews on the Agreement Record

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.

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

| Merge Event Details | | | | | | | New Merge Event Detail | Merge Event Details Help ? |
|--|------------------------|---------------------|----------------|-------------------|-------------------|-------------------------|------------------------|----------------------------|
| Action | Event Name | Sent Version Detail | Reviewer Email | Review Start Time | Review End Time | Received Version Detail | | |
| Edit Del | Review | 1.1.0 | [REDACTED] | 9/14/2015 2:34 PM | 9/14/2015 4:00 PM | 1.1.1 | | |
| Edit Del | Review | 1.1.0 | [REDACTED] | 9/14/2015 2:34 PM | | | | |

- 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.
- 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.

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_EmailTemplateForReviewSignatures* 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.

i 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**.

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.

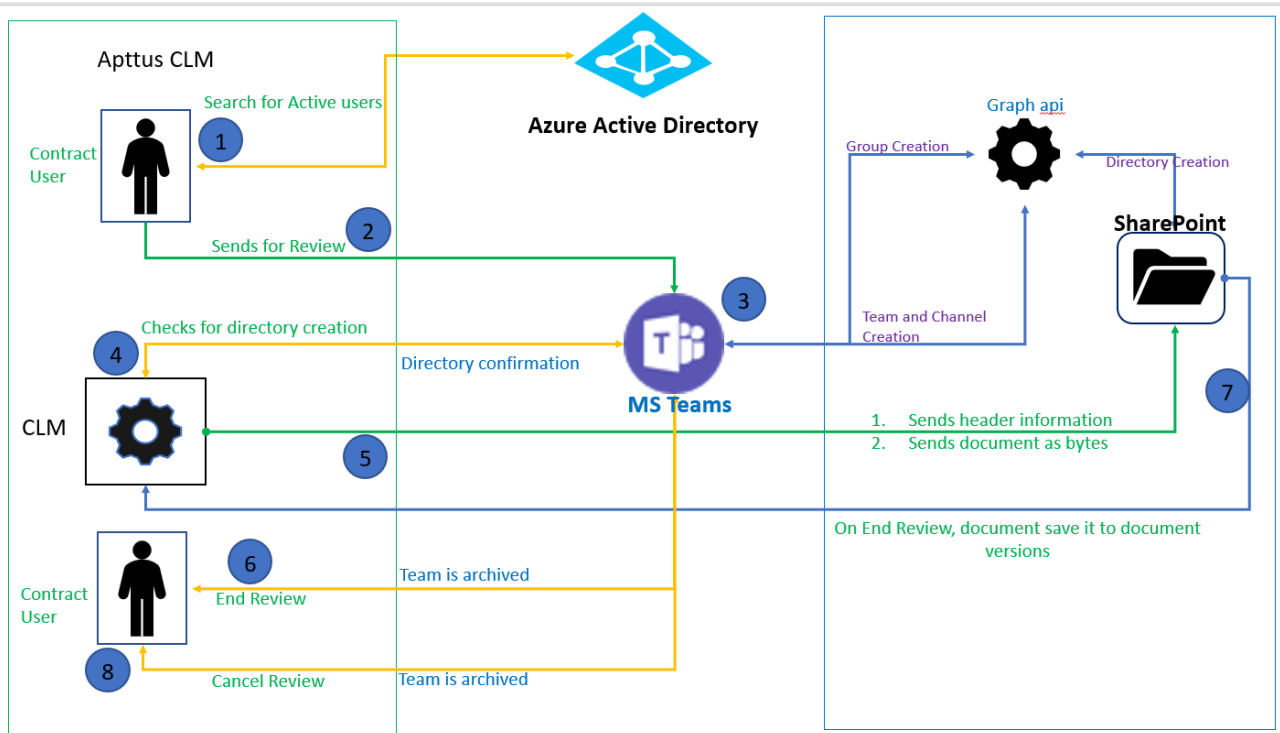
The review status changes to *Cancelled* on the Review Cycle page. The MS Team is Archived. If you edit the document, the changes will not be added to the agreement. An email notification is sent to all the reviewers that the review has been cancelled.

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 [Managing Office 365 Review](#).
- 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](#).

Restriction


- 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 [Managing Office 365 Review](#).


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.

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. 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 () icon.
 - 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.


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 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.


 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 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 cancelled 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 Cancelled. If one reviewer has completed the review but other reviews are Cancelled in that review cycle, the review cycle status changes to *Completed*, and the reviewed document is considered as the final version.

To 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**.

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**.

| Action | Type | Title | Last Modified | Created By |
|---|------------|--|--------------------|---------------------------------|
| Edit View Del | Attachment | MSA Test_Regenerated_Master Subscription Agreement_2014-08-19_nimimiccomments.docx | 9/23/2014 11:52 PM | Jharna Kundnani |
| Edit View Del | Attachment | MSA Test_Original_Master Subscription Agreement_2014-08-19.doc | 8/19/2014 10:32 PM | Jharna Kundnani |
| Edit View Del | Attachment | MSA Test_v2_Final.docx | 8/19/2014 4:46 AM | Jharna Kundnani |
| Edit View Del | Attachment | MSA Test_v1_Redlines.docx | 8/19/2014 4:03 AM | Jharna Kundnani |

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 Test 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.

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_EmailTemplateForReviewSignatures* 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.

i 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.

i 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.

i 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 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.

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

Renewal

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

Towards the end of the term of the agreement, you may want to renew the agreement for a further period of time. In such a scenario, the Renew action would create a new version of the agreement. The agreement can then be executed after updating the term of the

agreement. You can quickly identify contract renewal candidates, allowing plenty of time to act and create new contract drafts based on the previous contract.

Note

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

Termination

| User Permissions Needed | |
|----------------------------|------------------|
| To terminate an agreement: | Agreement: Edit. |

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

Expiration

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

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

Working with Offline Agreements

If you have a third-party paper that you want to use as a basis for your contract, Contract Management lets you create or import it as an offline agreement document. After an offline document is uploaded, Contract Management tags it with 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 *XAJSEndPoint* 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.

 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

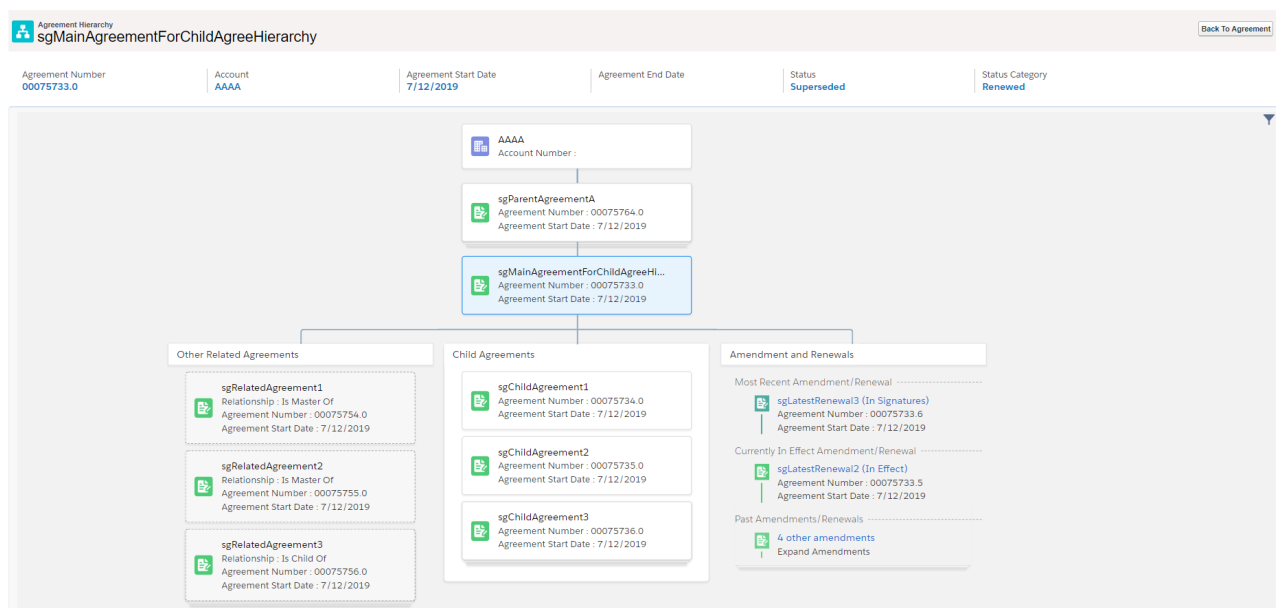
You can click the **Agreement Hierarchy (New)** button on the Agreement Detail page to view the agreement hierarchy of an agreement. The agreement hierarchy page displays a hierarchical list of agreements related to the current record. Hierarchical relationships to the current agreement include:

- 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 files 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.

The screenshot shows the Salesforce interface for the 'In Effect View' of agreement NR_20Nov_002. The page includes a navigation bar with 'Apttus Contract M...' and various menu items like Home, Agreements, Templates, Dashboards, Reports, and More. A search bar is visible at the top. The main content area features a summary card with the following details:

| | | | | |
|------------------|---------|----------------------|--------------------|-------|
| Agreement Number | Account | Agreement Start Date | Agreement End Date | Owner |
| 00080477.0 | Acc001 | | | M |

Below the summary card is a table titled 'Agreement Details In Effect' with 10 items. The table has the following columns: Agreement Field, Value, Agreement Number, Last Update by, Update on, and Change History. The rows are as follows:

| AGREEMENT DATA | Agreement Details In Effect | | | | | |
|-------------------|-----------------------------|--------------|------------------|----------------|------------|----------------|
| | 10 Items | | | | | |
| Details | Agreement Field | Value | Agreement Number | Last Update by | Update on | Change History |
| Agreement Clauses | Agreement Name | NR_20Nov_002 | 00080477.0 | M | 11/21/2019 | |
| Documents | Agreement Start Date | | 00080477.0 | M | 11/21/2019 | |
| | Agreement End Date | | 00080477.0 | M | 11/21/2019 | |
| | Renewal Term (Months) | | 00080477.0 | M | 11/21/2019 | |
| | Renewal Terms | | 00080477.0 | M | 11/21/2019 | |
| | Owner | | | | | |

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

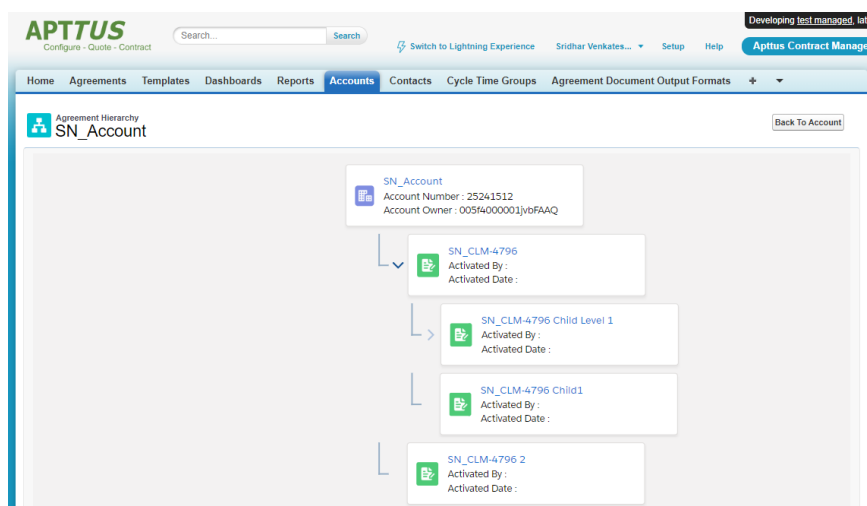
Prerequisite: Content Delivery must be enabled.

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](#).

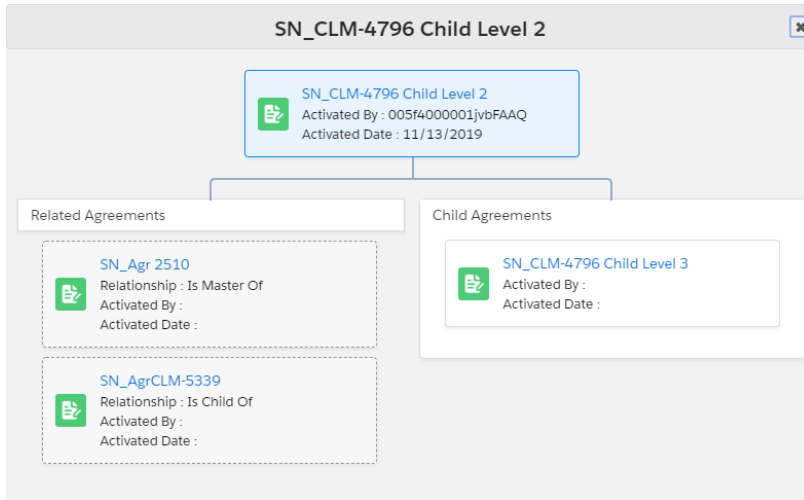
Prerequisite

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.

 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 | <ul style="list-style-type: none"> • Object name: Agreement Name • Name of the document: "MSA with Conga" • Clause name: Terms and Conditions • Account name: ABC corporation |

| Search Type | Description | Example |
|------------------------------|--|--|
| Search operators | Search with search operators (AND, OR). You can specify a main object as well as a related object. | <ul style="list-style-type: none"> • 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 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 | <ul style="list-style-type: none"> • 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 |

| Search Type | Description | Example |
|---|---|--|
| 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. |
| 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 | <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • 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 |


| Search Type | Description | Example |
|----------------|---|---|
| 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: <ul style="list-style-type: none"> • 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**.

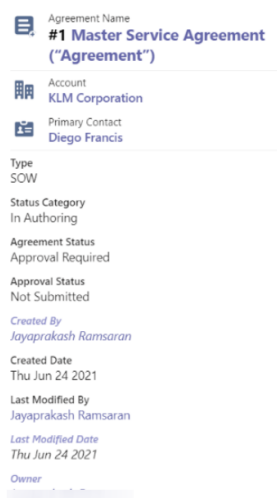
To use smart search as a chatbot

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.


| Name | Version | Document Action | Document Type | Review Status | Checkout By |
|------------------------|---------|-----------------|--------------------|-------------------------------------|-------------|
| > MSA Agreement_1.docx | 2.0.0 | Open & Edit | Agreement Document | <input checked="" type="checkbox"/> | |
| MSA Agreement_4.docx | 1.0.0 | Open & Edit | Agreement Document | <input type="checkbox"/> | |
| MSA Agreement_2.docx | 1.0.0 | Open & Edit | Agreement Document | <input type="checkbox"/> | |

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.

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

Restriction

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

About Document Versions Concepts

Contract Document Versioning divides the version of an Agreement document into three parts: Major, Minor and Revision. Each version of an agreement document is represented as a period-delimited numeric value in the Document Version Details object (e.g., "1.0.0"). As different users perform various actions on the document, version values are numerically incremented. The following table describes each version type represented by the version value and how it is created.

| Version Type | Document Action | User Role | Example Value |
|--------------------|---|----------------------------|-------------------------|
| Major | <p>A major version type is created every time a user:</p> <ul style="list-style-type: none"> • Generates a document. • Regenerates a document. • Creates an Offline document. • Imports an Offline document. • Generates a supporting document. • Checks in a Clean document or a document without Redlines. • Checks in a document as Final. <p>A MAJOR version can be either a new document instance or an incremented version of a pre-existing document. For further explanation, see New Document Versus Incremented Version.</p> | Contract Requestor / Owner | 1.0.0 2.0.0 3.0.0 |
| Minor (Negotiator) | <p>A minor version is created every time a Negotiator makes changes to the document and checks it in using X-Author for Contracts with the following exceptions:</p> <ul style="list-style-type: none"> • The Negotiator checks in the document as Clean or Final (creates a MAJOR version). • The Negotiator checks in a document on behalf of a Reviewer (creates a REVISION—see below). | Negotiator | 1.1.0 2.1.0 1.2.0 |

| 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 <i>X-Author Contracts for Outlook</i> plug-in, or checked in on their behalf by the Negotiator (for both internal and external reviewers) using <i>X-Author Contracts for Word</i> . 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).

regenerated using the same template

| Document Versions | | | | | | | | |
|--|--|---|----------|-------------|---------------|----------------|-----------------------|--------------------|
| Action | Name | Title | Template | Checkout By | Checkout Date | Latest Version | Latest Version Detail | Number Of Versions |
| Edit Del | Generate Agreement | SOW 012345 Copy Copy_Regenerate Agreement_SOW ABC_2015-08-14.docx | SOW ABC | | | 2.0.0 | 2.0.0 | 2 |
| Edit Del | Import Offline Agreement | Third Party Schedule.docx | | | | 1.0.0 | 1.0.0 | 1 |
| Edit Del | Regenerate Agreement | SOW 012345 Copy Copy_Regenerate Agreement_SOW Alt_2015-08-14.doc | SOW Alt | | | 1.0.0 | 1.0.0 | 1 |

regenerated using a different template

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).

The screenshot displays the 'Document Version Details' for a 'Generate Agreement' document. The page includes a header with 'Document Version' and 'Generate Agreement', and a navigation bar with 'Back to List: Agreements'. The main content area is divided into two sections: 'Document Version Detail' and 'Document Version Details' (table).

Document Version Detail

| | | | |
|-------------------------|--|-----------------------|-------------------------------------|
| Name | Generate Agreement | Owner | Chris Castro [Change] |
| Title | SOW Example_Regenerate Agreement_SOW ABC_2015-08-17.docx | Agreement | SOW Example |
| Checkout By | | Template | SOW ABC |
| Checkout Date | | Reference | 51a81b94-1913-4148-a4b9-d002740cddb |
| Checkout Version Detail | | Latest Version | 3.0.0 |
| | | Latest Version Detail | 3.0.0 |
| | | Is Transient | <input type="checkbox"/> |
| Created By | Chris Castro, 8/17/2015 6:10 PM | Number Of Versions | 4 |
| | | Last Modified By | Chris Castro, 8/17/2015 6:17 PM |

Document Version Details

| Action | Name | Title | Action | Comment | Is Transient | View |
|------------|-------|--|----------------------|----------------------|--------------------------|----------------------|
| Edit Del | 1.0.0 | SOW Example_Generate Agreement_SOW ABC_2015-08-17.docx | Generate Agreement | Generate Agreement | <input type="checkbox"/> | View |
| Edit Del | 1.1.0 | SOW Example_Redlines_SOW ABC_2015-08-17.docx | Check In | | <input type="checkbox"/> | View |
| Edit Del | 2.0.0 | SOW Example_Clean_SOW ABC_2015-08-17.docx | Check In | | <input type="checkbox"/> | View |
| Edit Del | 3.0.0 | SOW Example_Regenerate Agreement_SOW ABC_2015-08-17.docx | Regenerate Agreement | Regenerate Agreement | <input type="checkbox"/> | View |

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

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

To Download a Specific Version of the Agreement Document

Click the **View** link in the appropriate row. The agreement document is downloaded to your local drive.

Checking in the Final Version

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

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

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

| Document Versions | | | | | | | |
|--|--------------------------------------|--|-------------------------|-------------|---------------|----------------|-----------------------|
| Action | Name | Title | Template | Checkout By | Checkout Date | Latest Version | Latest |
| Edit Del | Generate Agreement | SOW 0123456_Final_SOW ABC_2015-08-14.docx | SOW ABC | | | 2.0.0 | 2.0.0 |
| Edit Del | Regenerate Agreement | SOW 0123456_Regenerate Agreement_SOW Alt_2015-08-14.docx | SOW AI | | | | 1.0.0 |

| Notes & Attachments | | |
|---|------------|---|
| Action | Type | Title |
| Edit View Del | Attachment | SOW0123456_Final_SOW ABC_2015-08-14.pdf |

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.

i 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.

| Document Version Detail Detail | | Edit | Delete | Clone |
|--------------------------------|---|----------------------|------------------------|-----------------------|
| Name | 1.0.0 | | | |
| Title | SOW_Original_CC FX2 SOW_2016-04-27.docx | | | |
| Version Major | 1 | | | |
| Version Minor | 0 | | | |
| Version Revision | 0 | | | |
| Action | Generate Agreement | | | |
| Template Version | v3.00 | | | |

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.

| Document Finder | | | | | | | |
|-------------------------------------|---|---------------|---------------------|---------------------|---------------------|--------------------|-------|
| Search for Document Name / Keywords | | All Versions | All Document States | All Document Owners | | | |
| Actions | Attachment Name | Template Name | Version | Document State | Last Modified By ID | Last Modified Date | Owner |
| View | AD Sales SOW 1.25.16.2_Redlines_CC FX2 SOW_2016-01-25.docx | CC FX2 SOW | 3.1.0 | | | 1/25/2016 4:44 PM | |
| View | AD Sales SOW 1.25.16.2_Regenerated_CC FX2 SOW_2016-01-25.docx | CC FX2 SOW | 3.0.0 | Draft | | 1/25/2016 4:39 PM | |
| View | AD Sales SOW 1.25.16.2_Regenerated_CC FX2 SOW_2016-01-25.docx | CC FX2 SOW | 2.0.0 | Draft | | 1/25/2016 4:35 PM | |
| View | AD Sales SOW 1.25.16.2_Original_CC FX2 SOW_2016-01-25.docx | CC FX2 SOW | 1.0.0 | Draft | | 1/25/2016 4:35 PM | |

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 are predefined tags set by the Default Document Tags property, or from previous checks of other agreement documents, they will be displayed in a drop-down).

The screenshot shows the Document Finder interface. At the top, it says 'Page 1 of 1' and 'Records per page 25'. The search box contains the text 'Sales' with a red circle around it. Below the search box are dropdown menus for 'All Versions' and 'All Document States'. A table of search results is displayed below, with a red box highlighting the first row. The table has columns: Actions, Title, Name, Document Info, Last Modified By ID, Last Modified Date, Last Name, and Template Name.

| Actions | Title | Name | Document Info | Last Modified By ID | Last Modified Date | Last Name | Template Name |
|----------------------|---|-------|---------------|------------------------------|--------------------|-----------|---|
| View | AD Sales SOW 1.29.16.1_Original_CC FX2 SOW_2016-01-29.docx | 2.0.0 | Draft | Matt Murdock | 1/29/2016 11:19 AM | Murdock | CC FX2 SOW |
| View | AD Sales SOW 1.29.16.1_Regenerated_CC FX2 SOW_2016-01-29.docx | 3.0.0 | Draft | Matt Murdock | 1/29/2016 11:21 AM | Murdock | CC FX2 SOW |
| View | AD Sales SOW 1.29.16.1_Regenerated_CC FX2 SOW_2016-01-29.docx | 4.0.0 | Draft | Chris Castro | 1/29/2016 12:31 PM | Castro | CC FX2 SOW |
| View | AD Sales SOW 1.29.16.1_Redlines_CC FX2 SOW_2016-01-29.docx | 3.1.0 | | Chris Castro | 1/29/2016 12:49 PM | Castro | CC FX2 SOW |
| View | AD Sales SOW 1.29.16.1__Inclusion of Provisions_2016-01-29.docx | 1.0.0 | Draft | Matt Murdock | 1/29/2016 11:20 AM | Murdock | Inclusion of Provisions |

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.

The screenshot shows the Document Finder interface. The search box now contains 'Sales, Provisions' with red circles around both tags. The table of search results is updated to show only one document.

| Actions | Title | Name | Document Info | Last Modified By ID | Last Modified Date | Last Name | Template Name |
|----------------------|---|-------|---------------|------------------------------|--------------------|-----------|---|
| View | AD Sales SOW 1.29.16.1__Inclusion of Provisions_2016-01-29.docx | 1.0.0 | Draft | Matt Murdock | 1/29/2016 11:20 AM | Murdock | Inclusion of Provisions |

3. After you enter a name or a tag, click on the 'X' in the tag (tag X) 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.

The screenshot shows the APTTUS interface with the 'Wizards' tab selected. At the top, there is a search bar with the text 'Search...' and a 'Search' button. Below the search bar, there is a navigation menu with 'Home', 'Wizard Designs', 'Wizard Component Library', and 'Wizards'. The main content area is titled 'Wizards Home' and contains a section 'Create New Wizard From Design' with a dropdown menu for 'Wizard Design' set to 'Test Hide Show' and a 'Go' button. A red callout box points to the search bar with the text 'Enter search terms to display a list of matching Wizards'. Below this, a search input field contains the text 'Business'. A table displays a list of wizard records with columns for Action, Wizard Name, Status, Wizard Design, Owner, and Last Modified Date. The table shows 14 records with various actions like 'Continue', 'Review', and 'Aborted'. At the bottom of the table, there is a pagination control showing 'Page 1 of 7' and 'Records per page 10'.

| Action | Wizard Name | Status | Wizard Design | Owner | Last Modified Date |
|----------|-----------------------|-------------|---------------------------------------|---------------------------------------|---------------------|
| Continue | A - Business Wizard 1 | In Progress | A - Business Wizard 1 | Charles Nelson | 11/24/2015 3:03 PM |
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | Charles Nelson | 11/24/2015 2:44 PM |
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | Charles Nelson | 11/24/2015 2:19 PM |
| Review | A - Business Wizard 1 | Aborted | A - Business Wizard 1 | Charles Nelson | 11/24/2015 12:45 PM |
| Continue | A - Business Wizard 1 | In Progress | A - Business Wizard 1 | Ramananda Ramachandra | 11/23/2015 1:36 PM |
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | Charles Nelson | 11/23/2015 10:32 AM |
| Continue | A - Business Wizard 1 | In Progress | A - Business Wizard 1 | Ramananda Ramachandra | 11/23/2015 9:29 AM |
| Continue | A - Business Wizard 1 | In Progress | A - Business Wizard 1 | Ramananda Ramachandra | 11/23/2015 9:26 AM |
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | Ramananda Ramachandra | 11/22/2015 10:14 PM |
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | Charles Nelson | 11/20/2015 6:24 PM |

To continue an In Progress Wizard

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

1. Navigate to the Wizard using the type-ahead feature or page navigation.
2. Click **Continue** under the Action column. The Wizard opens in a new tab at the current step.

The screenshot shows a table with columns: Action, Wizard Name, Status, Wizard Design, Owner, and Last Modified Date. The 'Continue' action for the first row is circled in red, and an arrow points to it. A modal window titled 'Your Business Wizard At Work' is overlaid on the table, showing a form for '7. Enter The Sales Line Item Details' with fields for Product, quantity, list price, and net price, and an 'Add Item' button.

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).

The screenshot shows the same table as above. The 'Review' action for the first row is circled in red, and an arrow points to it. A modal window titled 'Your Business Wizard At Work' is overlaid, showing a 'Submitted' status and a list of information submitted in the wizard, including sections for 'Identify Your Business Function', 'Identify Your Sales Business Activity', and 'Identify Your Customer Account'.

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).

The screenshot shows the APTTUS interface with the 'Wizards Home' section. Under 'Create New Wizard From Design', the 'Wizard Design' dropdown is set to 'Create Basic Agreement' and the 'Go' button is visible. Below is a table listing wizard instances:

| Action | Wizard Name | Status | Wizard Design | Owner | Last Modified Date |
|----------|------------------------|-------------|--|-------------|---------------------|
| Continue | Agreement Wizard 1 | In Progress | Agreement Wizard 1 | [User Icon] | 11/16/2015 11:58 AM |
| Review | Agreement Wizard 1 | Submitted | Agreement Wizard 1 | [User Icon] | 11/16/2015 11:58 AM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [User Icon] | 11/17/2015 12:09 PM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [User Icon] | 11/16/2015 2:49 PM |
| Continue | Basic New Agreement | In Progress | Basic New Agreement | [User Icon] | 11/17/2015 12:08 PM |
| Review | Create Basic Agreement | Aborted | Create Basic Agreement | [User Icon] | 11/19/2015 6:31 PM |

Page 1 of 1 << Previous Next >> Records per page 10

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.

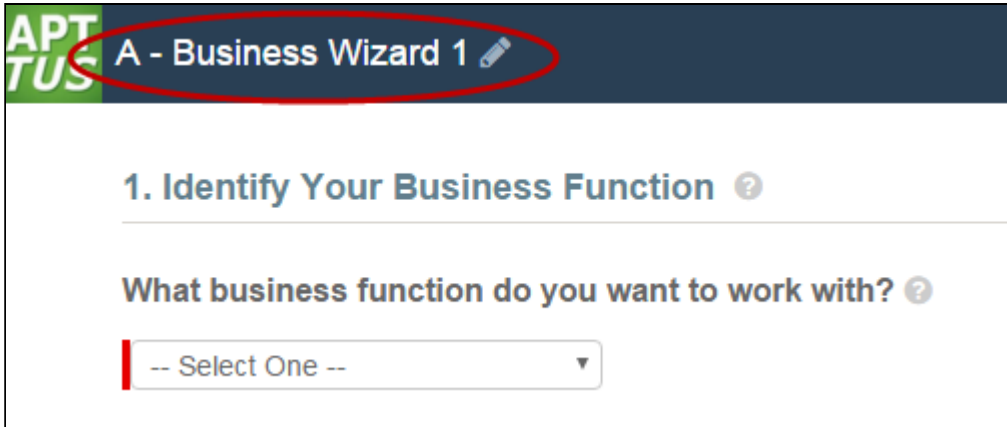
This screenshot shows the 'Wizards Home' page with the 'Wizard Design' dropdown menu open, displaying options: 'Create Sales Contract', 'Create Basic Agreement', 'Basic New Agreement', and 'Agreement Wizard 1'. The 'Go' button is circled in red. The table below shows the wizard instances:

| Action | Wizard Name | Status | Wizard Design | Owner | Last Modified Date |
|----------|------------------------|-------------|--|-------------|---------------------|
| Continue | Create Sales Contract | In Progress | Create Sales Contract | [User Icon] | 11/19/2015 8:00 PM |
| Review | Create Basic Agreement | Aborted | Create Basic Agreement | [User Icon] | 11/19/2015 6:31 PM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [User Icon] | 11/17/2015 12:09 PM |
| Continue | Basic New Agreement | In Progress | Basic New Agreement | [User Icon] | 11/17/2015 12:08 PM |
| Review | Basic New Agreement | Submitted | Basic New Agreement | [User Icon] | 11/16/2015 2:49 PM |
| Continue | Agreement Wizard 1 | In Progress | Agreement Wizard 1 | [User Icon] | 11/16/2015 11:58 AM |
| Review | Agreement Wizard 1 | Submitted | Agreement Wizard 1 | [User Icon] | 11/16/2015 11:58 AM |

Page 1 of 1 << Previous Next >> Records per page 10

 Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

- (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.

| Create New Wizard From Design | | | |
|-------------------------------|--------------------------------|-------------------------|--|
| Wizard Design | | A - Business Wizard 1 ▼ | Go |
| Action | Wizard Name | Status | Wizard Design |
| Continue | My First Sales Contract | In Progress | A - Business Wizard 1 |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo |
| Review | Wizard NotesAttachments Demo | Submitted | Wizard NotesAttachments Demo |
| Continue | Wizard Customization Demo | In Progress | Wizard Customization Demo |

- 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.

The screenshot shows the 'CC Business Wizard' interface. At the top, there is a green header with the title 'CC Business Wizard' and two buttons: 'Save' and 'Next'. Below the header, a vertical sidebar on the left is labeled 'STEPS'. The main content area is titled '1. Identify Your Business Function'. It contains the question 'What business function do you want to work with?' followed by a dropdown menu with the text '-- Select One --'.

When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option(s). For example, in the following step, when you choose "Sales Contract" as the business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.

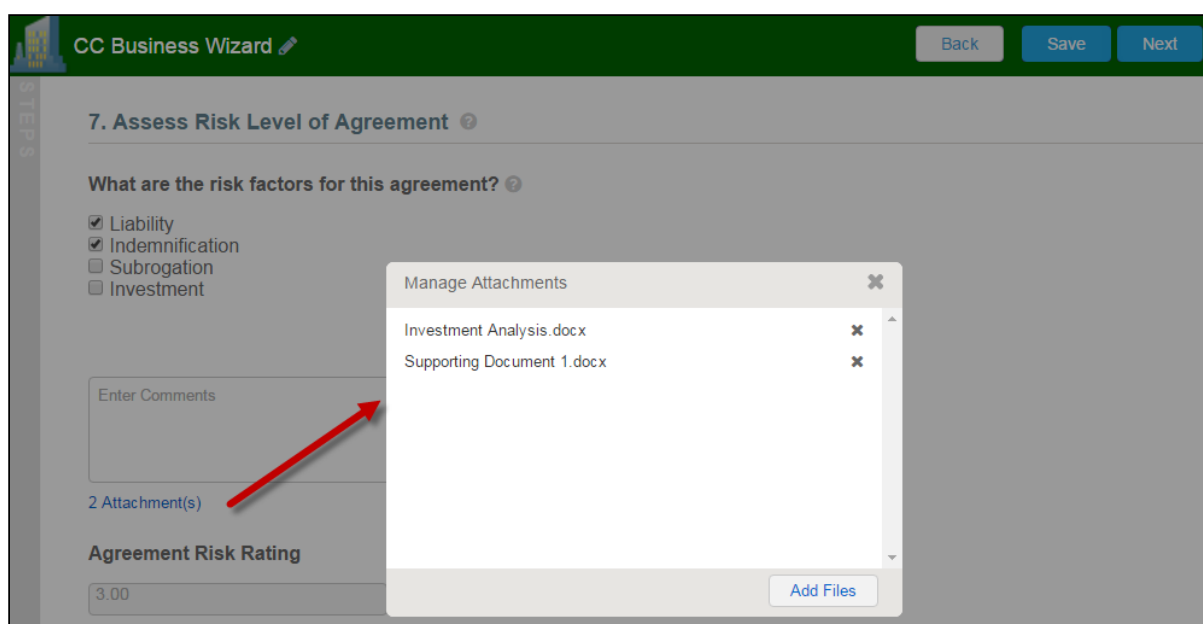
The screenshot shows the 'CC Business Wizard' interface at Step 2. The header is green with 'CC Business Wizard' and buttons for 'Back', 'Save', and 'Next'. The sidebar on the left is labeled 'STEPS'. The main content area is titled '2. Identify Your Sales Business Activity'. It contains two questions: 'What type of business activity do you wish to work with?' with radio button options for 'Sales Quote', 'Sales Contract' (which is selected), and 'Sales Order'; and 'What type of transaction do you wish to perform?' with radio button options for 'Create' (which is selected) and 'Request'. Below the questions is an image of a pen writing on a document labeled 'CONTRACT'. At the bottom, it says 'Creates Agreement'.

- Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area

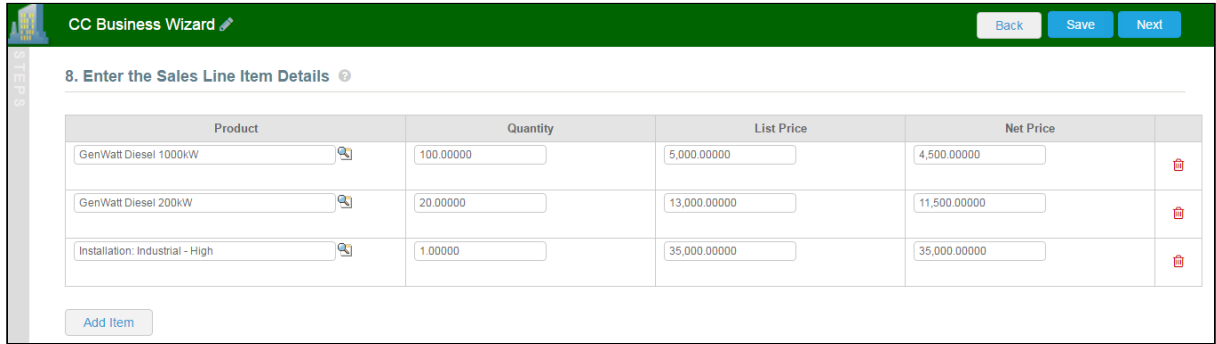
provided (500 character limit), click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:

- Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.
- Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.
- Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.]

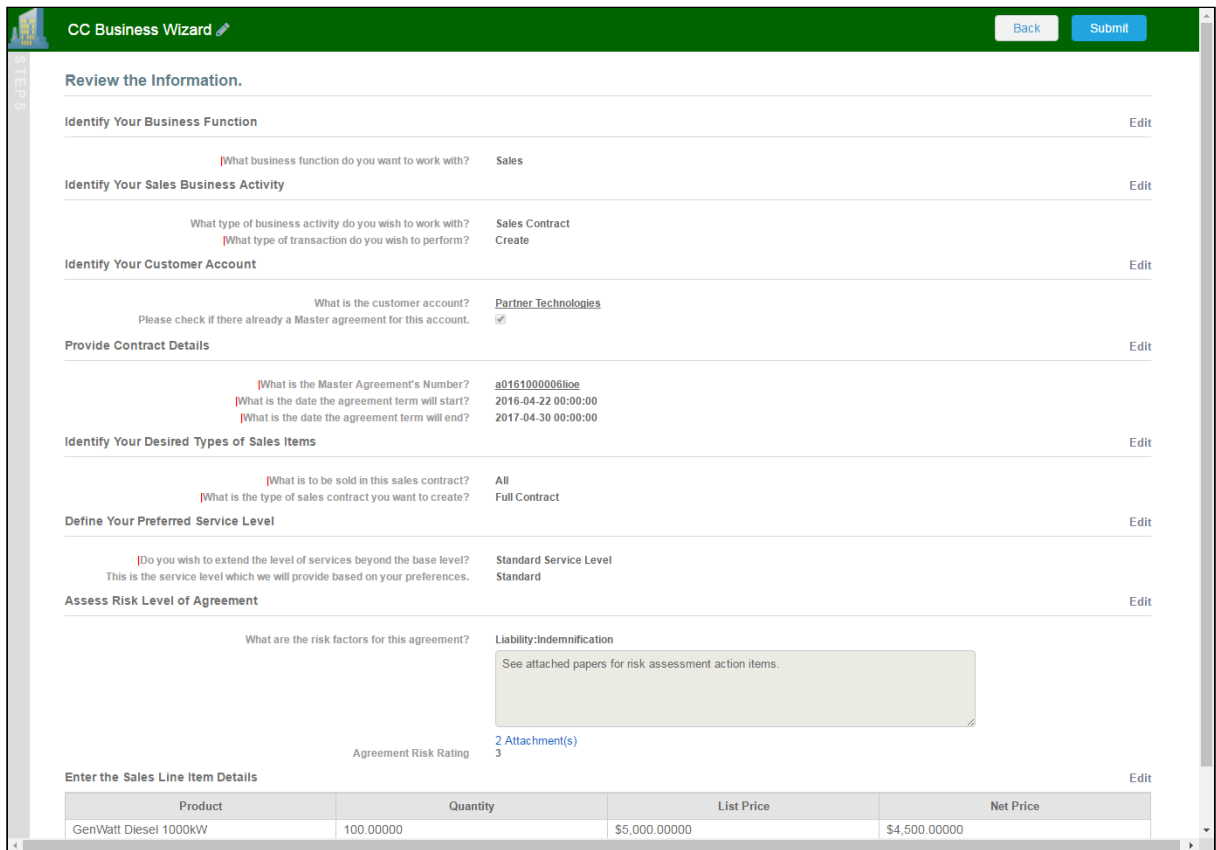
i If you have an 'Import Offline Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Agreement Document. If you have an 'Import Supporting Document' field in the Wizard and you use it to upload a document, the Document Type is marked as Supporting Document.



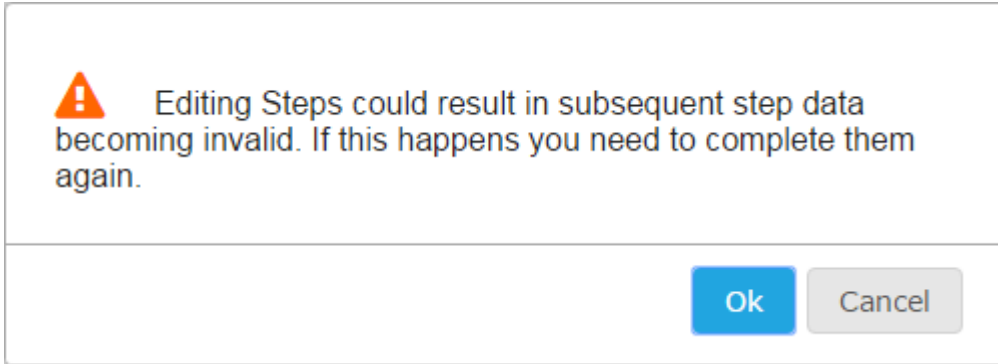
- Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses—for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.



- 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](#)).
- 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.



- 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).

APTUS
A - Business Wizard 1
Submitted

Following Information was submitted in this Wizard.

Identify Your Business Function

What business function do you want to work with? Sales

Identify Your Sales Business Activity

What type of business activity do you wish to work with? Sales Contract
 What type of transaction do you wish to perform? Create

Identify Your Customer Account

What is the customer account? Partner Technologies
 Please check here if there is already a Master Agreement for this Account.

Provide Contract Details

What is the Master Agreement's Number? AD_Sales_SOW 1,29,16,1
 What is the date the agreement term will start? 2016-02-18 00:00:00
 What is the date the agreement term will end? 2017-02-28 00:00:00

Identify Your Desired Types of Sales Items

What is to be sold in this sales contract? All
 What is the type of sales contract you want to create? Full Contract

Define Your Preferred Service Level

Do you wish to extend the level of services beyond the base level? Extended Service Level
 How many days of service coverage do you want? 6 days - ext 1
 Enter your desired hours of coverage. 12 Hours - 8 am to 8 pm Eastern
 What is the maximum expected initial response time for your service cases? 08 Hours
 What is the maximum time in coverage days for the solution to be provided? 06 days
 This is the service level which we will provide based on your preferences. Premier

Enter the Sales Line Item Details

| Product | Quantity | List Price | Net Price |
|-----------------------------------|----------|----------------|----------------|
| GenWatt Diesel 1000kW | 10.00000 | \$5,000.00000 | \$4,500.00000 |
| GenWatt Diesel 200kW | 20.00000 | \$2,500.00000 | \$2,000.00000 |
| Installation: Industrial - Medium | 1.00000 | \$25,000.00000 | \$20,000.00000 |

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

| Action | Wizard Name | Status | Wizard Design | Owner | Last Modified Date |
|----------|------------------------------|-------------|--|--------|--------------------|
| Review | A - Business Wizard 1 | Submitted | A - Business Wizard 1 | [User] | 2/18/2016 3:54 PM |
| Continue | Your Business Wizard At Work | In Progress | A - Business Wizard 1 | [User] | 2/18/2016 3:43 PM |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo | [User] | 2/17/2016 11:18 AM |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo | [User] | 2/17/2016 11:18 AM |
| Continue | Wizard Survey Demo | In Progress | Wizard Survey Demo | [User] | 2/17/2016 11:15 AM |
| Review | Wizard NotesAttachments Demo | Submitted | Wizard NotesAttachments Demo | [User] | 2/17/2016 11:12 AM |
| Continue | Wizard Customization Demo | In Progress | Wizard Customization Demo | [User] | 2/17/2016 11:07 AM |
| Continue | Wizard Customization Demo | In Progress | Wizard Customization Demo | [User] | 2/17/2016 9:48 AM |
| Continue | Wizard NotesAttachments Demo | In Progress | Wizard NotesAttachments Demo | [User] | 2/10/2016 11:40 AM |
| Continue | Wizard NotesAttachments Demo | In Progress | Wizard NotesAttachments Demo | [User] | 2/10/2016 11:35 AM |

Page 1 of 1 << Previous Next >> Records per page: 10

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

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

| Notes & Attachments | | | |
|--|------|---|--------------------|
| 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

| | |
|------------|---|
| Note Owner | [Redacted] |
| Related To | a01A000000NF53 |
| Private | <input type="checkbox"/> |
| Title | A - Business Wizard 1 Notes |
| Body | This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU |
| Created By | [Redacted] 11/24/2015 2:44 PM |

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.**

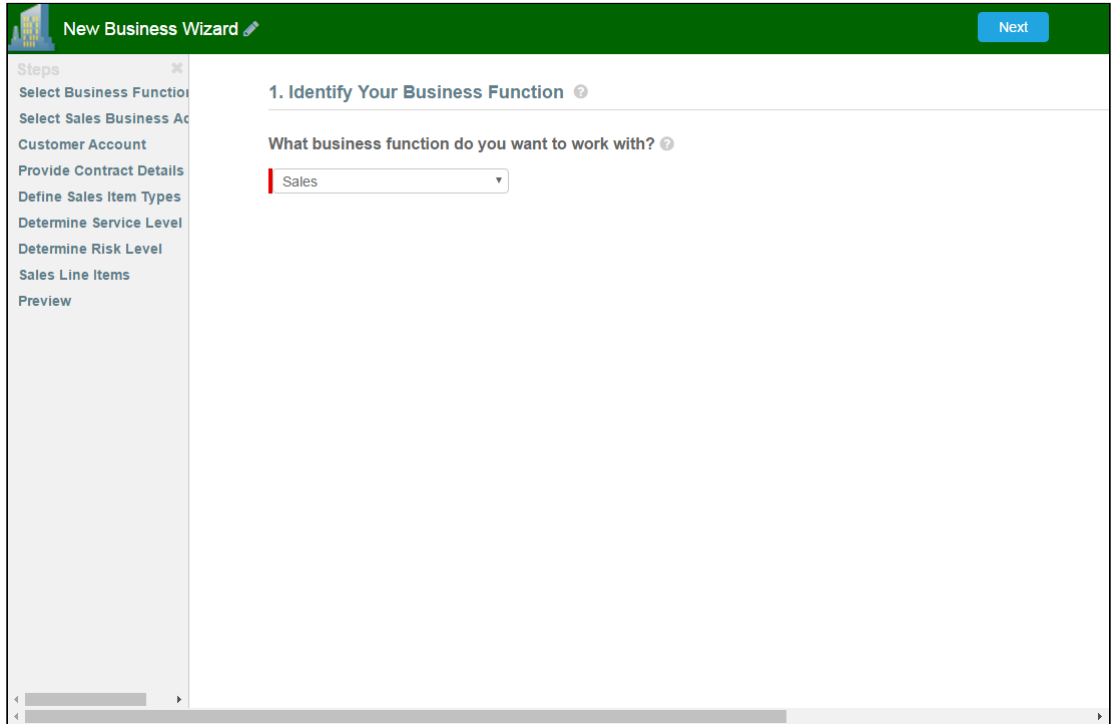
Accessing the Preview Sidebar

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:

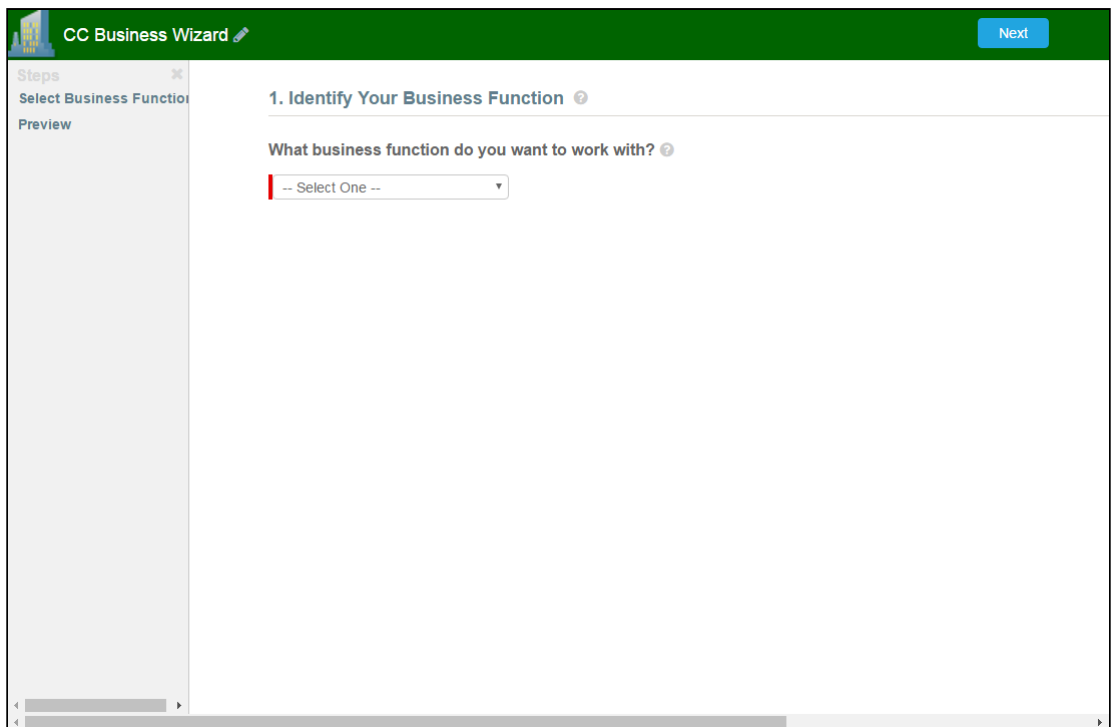
- Preview a future step in the Wizard.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

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.

i 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**.

i **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.

The screenshot shows the 'CC Business Wizard' interface. At the top, there is a green header with the title 'CC Business Wizard' and three buttons: 'Back', 'Save', and 'Next'. Below the header, the main content area is titled '2. Identify Your Sales Business Activity'. On the left side, there is a vertical sidebar labeled 'STEPS'. The main content area contains two sections:

- What type of business activity do you wish to work with?** This section has three radio button options: 'Sales Quote', 'Sales Contract' (which is selected), and 'Sales Order'.
- What type of transaction do you wish to perform?** This section has two radio button options: 'Create' (which is selected) and 'Request'.

Below these sections, there is an image of a pen resting on a document with the word 'CONTRACT' visible. At the bottom of the form, it says 'Creates Agreement'.

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. |

| Attribute | Description |
|----------------|---|
| 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.

| Field Criteria | | |
|----------------|--|---|
| Col | Field | |
| 1 | Agreement Name | |
| 2 | Agreement Number_Num (INTERNAL) | — |
| 3 | Account | — |
| 4 | Aboard Company | — |
| 5 | Account | — |
| 6 | Account Legal State/Province Foreign0040 | — |
| 7 | Account Legal State/Province Foreign039 | — |
| | Account Legal State/Province UStates039 | — |
| | Account Search Field | |
| | Activated By | |
| | Activated Date | |
| | AgrApproval Status | |
| | Agreement AttURL | |
| | Agreement AttURL2 | |
| | Agreement Category | |
| | Agreement End Date | |
| | Agreement Hierarchies | |

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

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

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

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

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

To define Report Filter Settings

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

| Filter Sets | | | | |
|-------------|-----------------------|----------|----------------------|--|
| Col | Field | Operator | Value | |
| 1 | Account | equal to | <input type="text"/> | |
| 2 | Agreement Start Date | equal to | mm/dd/yyyy | |
| 3 | Total Agreement Value | equal to | <input type="text"/> | |

[Add Filter](#)
 Advanced Filter

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. | | | | | | | | |
| Operator | Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains." <table border="1" data-bbox="572 1274 1426 1738"> <thead> <tr> <th>Datatype</th> <th>Operator</th> </tr> </thead> <tbody> <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> </tbody> </table> | 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 |
| 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 | | | | | | | | |
| 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.

- 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."

- 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

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

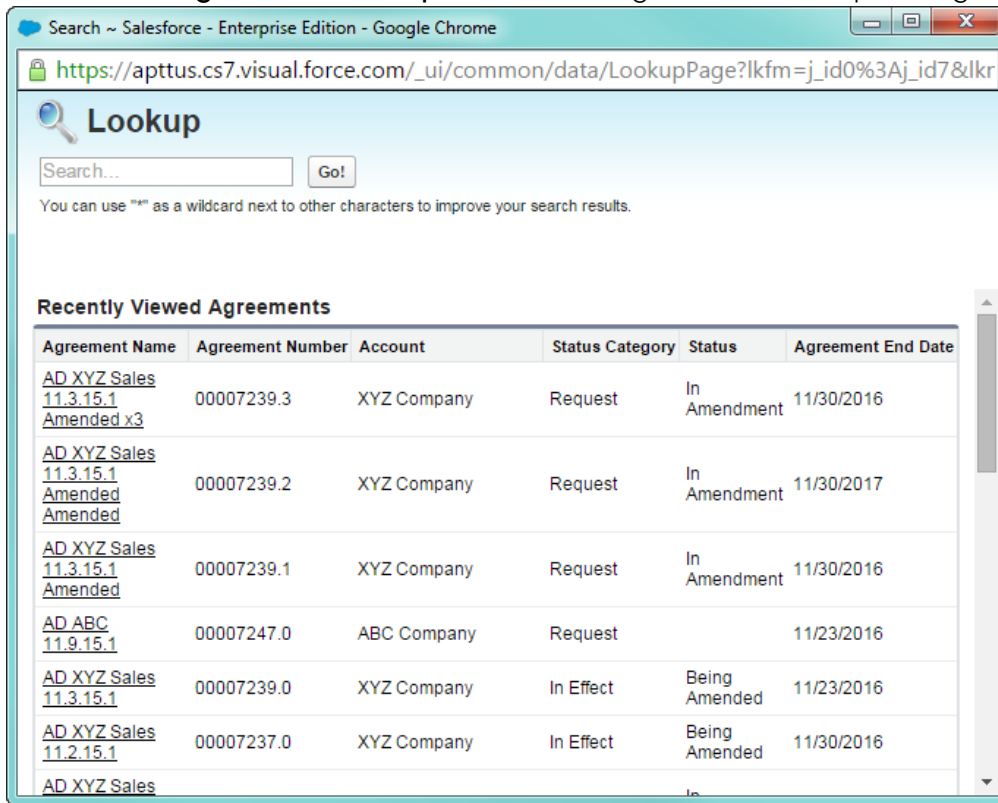
Running Agreement Hierarchy Reports

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

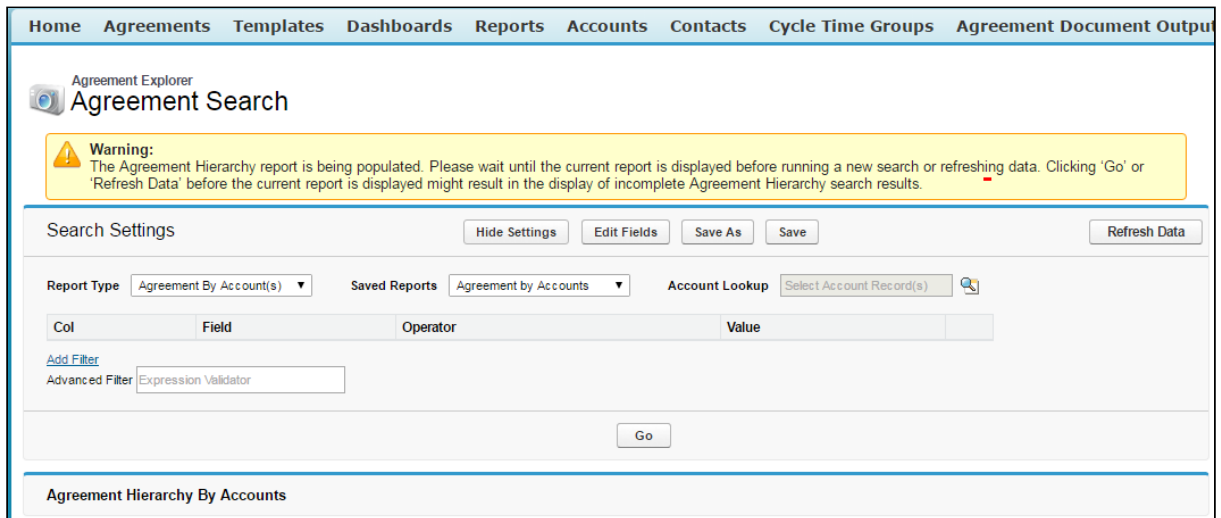
To run an agreement hierarchy report

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.

The screenshot shows the 'Agreement Explorer Agreement Search' interface. At the top, there are buttons for 'Hide Settings', 'Edit Fields', 'Save As', 'Save', and 'Refresh Data'. Below this, the 'Search Settings' section includes a 'Report Type' dropdown set to 'Agreement', 'Saved Reports' set to 'Flagtest-Public(T)-Default', and an 'Agreement Lookup' field containing 'AD XYZ Sales 11.2.15.1'. A table with columns 'Col', 'Field', 'Operator', and 'Value' is visible, along with an 'Add Filter' link and an 'Advanced Filter' input field containing 'Expression Validator'. A 'Go' button is located below the filter section. The main content area displays the 'Agreement Hierarchy For: AD XYZ Sales 11.2.15.1' with an 'Export' button. The hierarchy list includes the following items:

| Agreement Name |
|--|
| AD XYZ Sales 11.2.15.1 |
| AD XYZ Sales 11.3.15.1 |
| AD XYZ Sales 11.3.15.1 Amended |
| Sales Wayne Enterprises 11.5.15.1 |
| AD XYZ Sales 11.3.15.1 Amended Amended |
| AD ABC 11.9.15.1 |
| AD XYZ Sales 11.3.15.1 Amended x3 |

At the bottom of the report, it shows 'Page 1 of 1', navigation arrows '<< Previous Next >>', and 'Records per page 25'.

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).

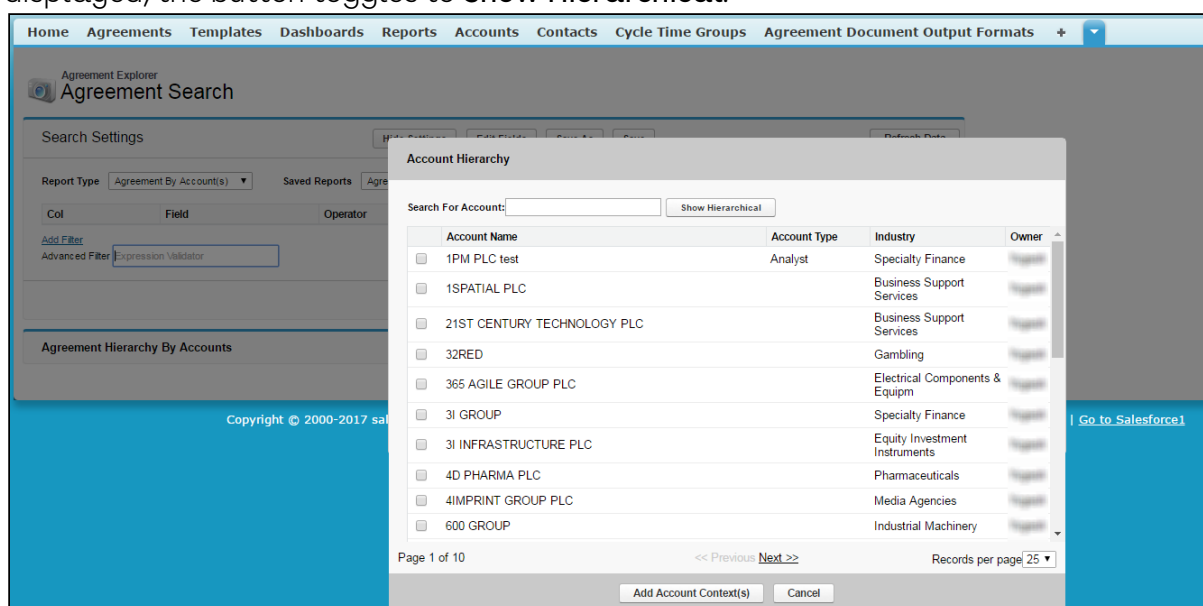
1. Navigate to the **Agreement Explorer** tab.
2. Click on a link in the Saved Reports table with **Agreement** as context.
3. Click on the **Agreement Lookup** icon. An Agreement Lookup dialog is displayed, prompting you to search for a specific record or select one from a list of recent agreements.
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.

- You can take several actions from the resulting report list. See [Using Agreement Hierarchy Reports](#) for a description of these actions.

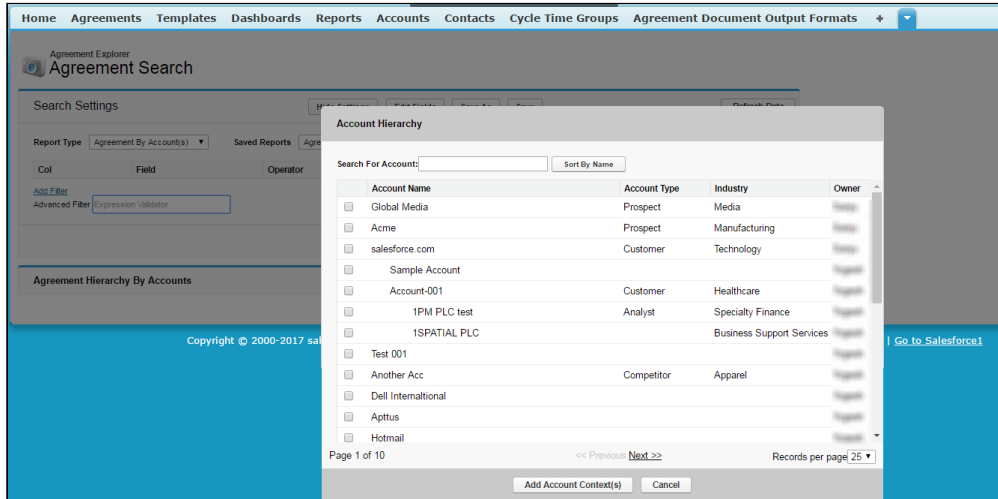
Running Agreement Hierarchy by Accounts Reports

To Run the Default Agreement by Accounts Report for One or More Accounts

- Navigate to **Agreement Explorer** tab.
- 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**.
- 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.
- 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**.

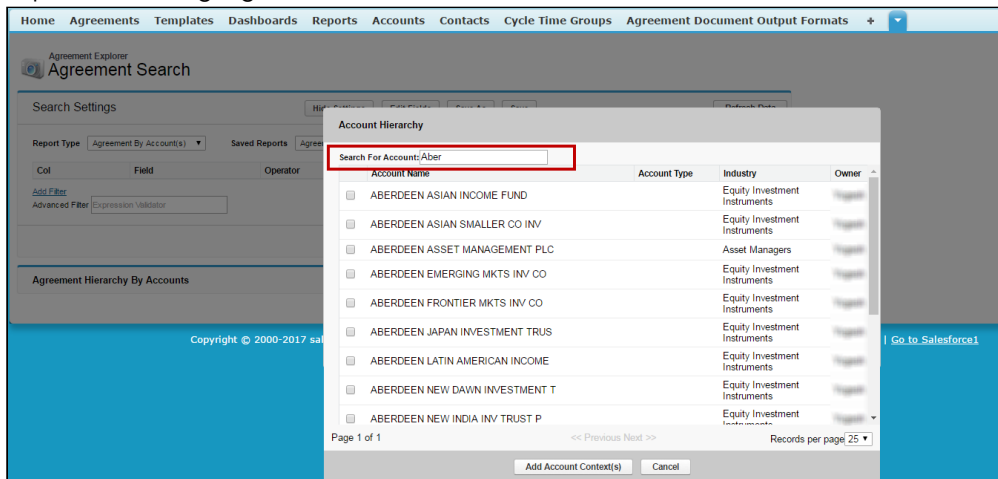


To view the accounts list again in hierarchical form, you can click **Show Hierarchical**.



The Sort by Name and Show Hierarchical are toggle buttons.

- 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.



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

Agreement Explorer
Agreement Search

Search Settings Hide Settings Edit Fields Save As Save Refresh Data

Report Type: Agreement By Account(s) Saved Reports: ABC Company Agreement Account Lookup: ABC Company, XYZ Compan

| Col | Field | Operator | Value |
|-----|---------|----------|-------------|
| 1 | Account | equal to | XYZ Company |

[Add Filter](#)
Advanced Filter: 1

Go

Agreement Hierarchy By Accounts

ABC Company Export

| Agreement Name | Agreement Number_Num (INTERNAL) | Related To Agreement | Related From Agreement | Status Category | Status |
|------------------------|---------------------------------|----------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237 | - | View From Agreements | In Effect | Being Amended |
| AD ABC 11.9.15.1 | 00007247 | - | - | Request | Being Amended |
| Sales | 00009809 | - | - | Request | Being Amended |

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

XYZ Company Export

| Agreement Name | Agreement Number_Num (INTERNAL) | Related To Agreement | Related From Agreement | Status Category | Status |
|---------------------------------------|---------------------------------|------------------------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237 | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 | 00007239 | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 Amended | 00007239 | View To Agreements | - | Request | In Amendment |
| Sales Wayne Enterprises 11.5.15.1 | - | - | - | Request | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended Amende | - | View To Agreements | - | Request | In Amendment |
| AD ABC 11.9.15.1 | - | - | - | Request | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239 | View To Agreements | - | Request | In Amendment |
| AD XYZ Sales 11.2.15.1 Amended | 00007237 | View To Agreements | - | Request | In Amendment |

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

Columns represent the default Field Set

Records which do not match the default Filter Set are grayed out (you can still click on them)

Records which match the account record 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

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

The screenshot shows the 'Agreement Explorer Agreement Search' interface. At the top, there are search settings and buttons for 'Show Settings', 'Edit Fields', 'Save As', 'Save', and 'Refresh Data'. Below this is the 'Agreement Hierarchy By Account' section, which is currently set to 'ABC Company'. A red callout box points to this section with the text 'Report results for specific account only'. Below the account name is an 'Export' button. The main area displays a table of agreement records:


| Agreement Name | Agreement Number_Num (INTERNAL) | Related To Agreement | Related From Agreement | Status Category | Status |
|------------------------|---------------------------------|----------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237 | - | View From Agreements | In Effect | Being Amended |
| AD ABC 11.9.15.1 | 00007247 | - | - | Request | |
| Sales | 00009809 | - | - | Request | |

At the bottom of the table, it shows 'Page 1 of 1', navigation arrows '<< Previous Next >>', and a 'Records per page' dropdown set to 25.

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 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.

Agreement Hierarchy For: SD5X-Child5

Export

| Agreement Name |
|------------------------------|
| SD5X-Parent |
| SD5X-Child1 |
| SD5X-Child2 |
| SD5X-Child3 |
| SD5X-Child4 |
| SD5X-Child5 |
| SD5X-Child6 |
| SD5X-Child7 |
| SD5X-Child8 |
| SD5X-Child9 |
| SD5X-Child10 |

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

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.

| Agreements | | | | | | |
|--|---------------------------------|---------------------------------------|------------------------------------|--------------------------------------|------------------------------------|---------------|
| Export | | | | | | |
| Agreement Name | Agreement Number_Num (INTERNAL) | Agreement Hierarchies | Related To Agreement | Related From Agreement | Account | Status |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239 | Agreement Hierarchies | View To Agreements | - | XYZ Company | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239 | Agreement Hierarchies | View To Agreements | - | XYZ Company | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended | 00007239 | Agreement Hierarchies | View To Agreements | - | XYZ Company | In Amendment |
| AD ABC 11.9.15.1 | 00007247 | Agreement Hierarchies | - | - | ABC Company | |
| AD XYZ Sales 11.3.15.1 | 00007239 | Agreement Hierarchies | - | View From Agreements | XYZ Company | Being Amended |
| Venture Industries CLONE Sales 12.15 | 00007243 | Agreement Hierarchies | - | - | Venture Industries | Request |
| Venture Industries CLONE Sales 11.15 | 00007242 | Agreement Hierarchies | - | - | Venture Industries | |
| AD XYZ Sales 11.2.15.1 Amended | 00007237 | Agreement Hierarchies | View To Agreements | - | XYZ Company | In Amendment |
| AD XYZ Sales 11.2.15.1 | 00007237 | Agreement Hierarchies | - | View From Agreements | XYZ Company | Being Amended |

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

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.

Agreement Explorer
Agreement Search

Search Settings Show Settings Edit Fields Save As Save Refresh Data

Agreement Hierarchy For: AD XYZ Sales 11.2.15.1 Export

| Agreement Name | Agreement Number | Account | Related To Agreement | Related From Agreement | Status Category | Status |
|--|------------------|-----------------------------|------------------------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 | 00007239.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 Amended | 00007239.1 | XYZ Company | View To Agreements | - | Request | In Amendment |
| Sales Wayne Enterprises 11.5.15.1 | 00007241.0 | Wayne Corp | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239.2 | XYZ Company | View To Agreements | - | Request | In Amendment |
| AD ABC 11.9.15.1 | 00007247.0 | ABC Company | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239.3 | XYZ Company | View To Agreements | - | Request | In Amendment |

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

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.

i 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.

Agreement Explorer
Agreement Search

Show Settings Edit Fields Save As Save Refresh Data

Agreement Hierarchy By Accounts

ABC Company

Export

| Agreement Name | Agreement Number_Num (INTERNAL) | Related To Agreement | Related From Agreement | Status Category | Status |
|--|---------------------------------|----------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237 | - | View From Agreements | In Effect | Being Amended |
| AD ABC 11.9.15.1 | 00007247 | - | - | Request | |
| Sales | 00009809 | - | - | Request | |

Page 1 of 1 Records per page 25 ▼

XYZ Company

Export

| Agreement Name | Agreement Number_Num (INTERNAL) | Related To Agreement | Related From Agreement | Status Category | Status |
|--|---------------------------------|------------------------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237 | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 | 00007239 | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 Amended | 00007239 | View To Agreements | - | Request | In Amendment |
| Sales Wayne Enterprises 11.5.15.1 | 00007241 | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239 | View To Agreements | - | Request | In Amendment |
| AD ABC 11.9.15.1 | 00007247 | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239 | View To Agreements | - | Request | In Amendment |
| AD XYZ Sales 11.2.15.1 Amended | 00007237 | View To Agreements | - | Request | In Amendment |

Page 1 of 1 Records per page 25 ▼

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:

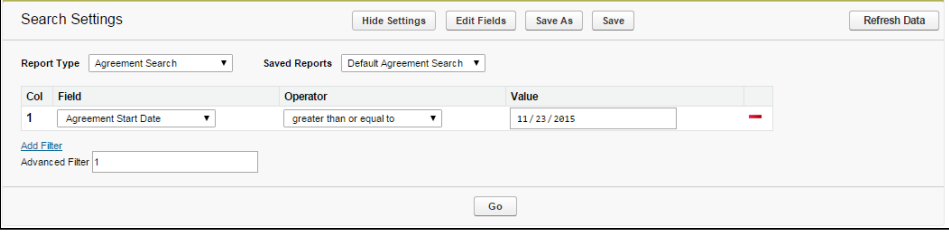
- from the Agreement Explorer tab:
 - the administrator-defined default report for Agreement Hierarchy by Account(s)

- 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 |
|------------------------------------|---|
| <p>Show Settings/Hide Settings</p> | <p>Click Show Settings/Hide Settings to expand or collapse the Search Settings section.</p>  <p>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.</p> |
| <p>Edit Fields</p> | <p>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.</p> |
| <p>Back to Root Report</p> | <p>Click this link to return to the first set of results generated when the report was originally executed.</p> |
| <p>Show 5 more</p> | <p>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.</p> |

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.

The screenshot shows the 'Agreement Search' interface. At the top, there are buttons for 'Show Settings', 'Edit Fields', 'Save As', 'Save', and 'Refresh Data'. Below this is a table of agreements with columns for Agreement Name, Agreement Number_Num (INTERNAL), Agreement Hierarchies, Related To Agreement, Related From Agreement, Account, and Status. The table contains 10 rows of data. At the bottom, there is a 'Page 1 of 1' indicator, navigation arrows, and a 'Records per page 25' dropdown.

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

This screenshot shows the 'Agreement Search' interface with the search settings section expanded. The 'Search Settings' area is highlighted with a red border and contains a 'Hide Settings' button, 'Edit Fields', 'Save As', 'Save', and 'Refresh Data' buttons. Below these are dropdowns for 'Report Type' (set to 'Agreement Search') and 'Saved Reports' (set to 'Default Agreement Search'). A filter table is visible with one filter: '1 Agreement Start Date' with the operator 'greater than or equal to' and the value '11/23/2015'. There is an 'Add Filter' link and an 'Advanced Filter 1' input field. A 'Go' button is at the bottom of the settings section. Below the settings is the same table of agreements as in the previous screenshot.

Use the following links to quickly jump to a task:

- [To edit the settings for any report](#)

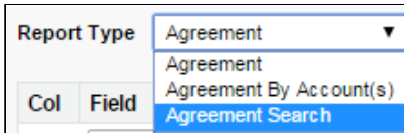
- To Change the Saved Report Type
 - To Change the Report Type to Agreement Search
 - To Change the Report Type to Agreement
 - To change the report type to Agreement Hierarchy by Account(s)
- To run a saved Agreement Explorer report
 - To Edit Fields Displayed in a Report
 - To Change Filter Settings for a Report
 - To Refresh Agreement Data for a Report
- To save Edits to report settings

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

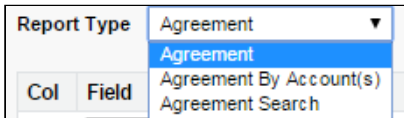
1. Click on the **Type** drop-down menu and choose **Agreement Search**.




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.

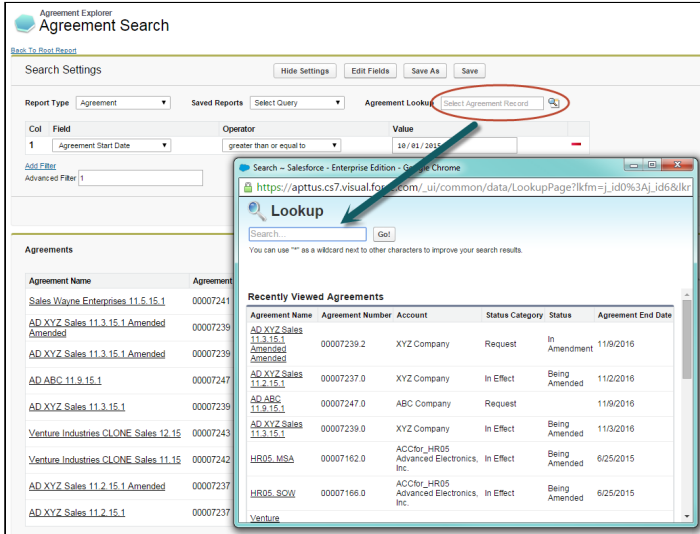
To Change the Report Type to Agreement

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



Search Settings are refreshed to display the **Agreement Lookup** field.

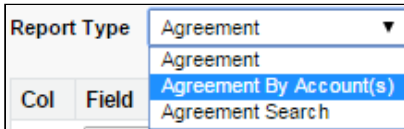
2. Click on the **Agreement Lookup**  icon to display a lookup dialog for agreement records.




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.

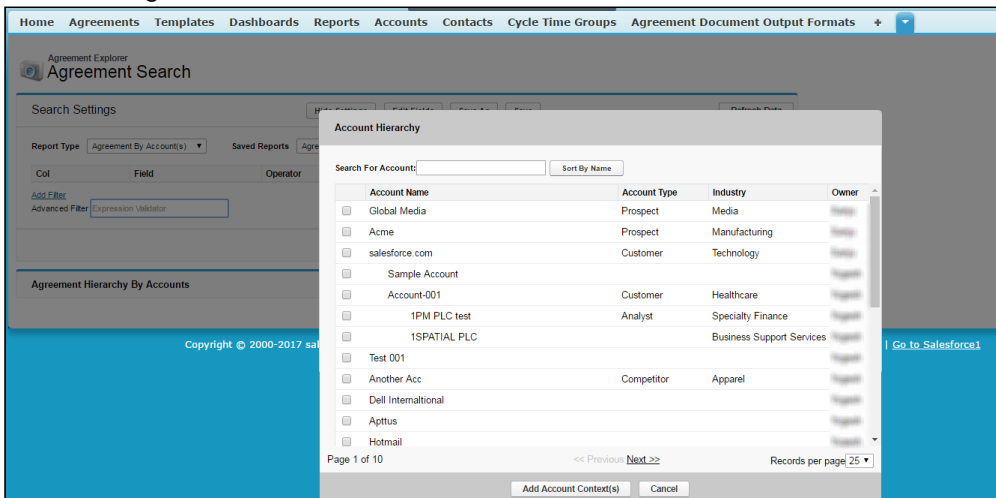
To change the report type to Agreement Hierarchy by Account(s)

1. Click the **Type** drop-down menu and choose **Agreement by Account(s)**.

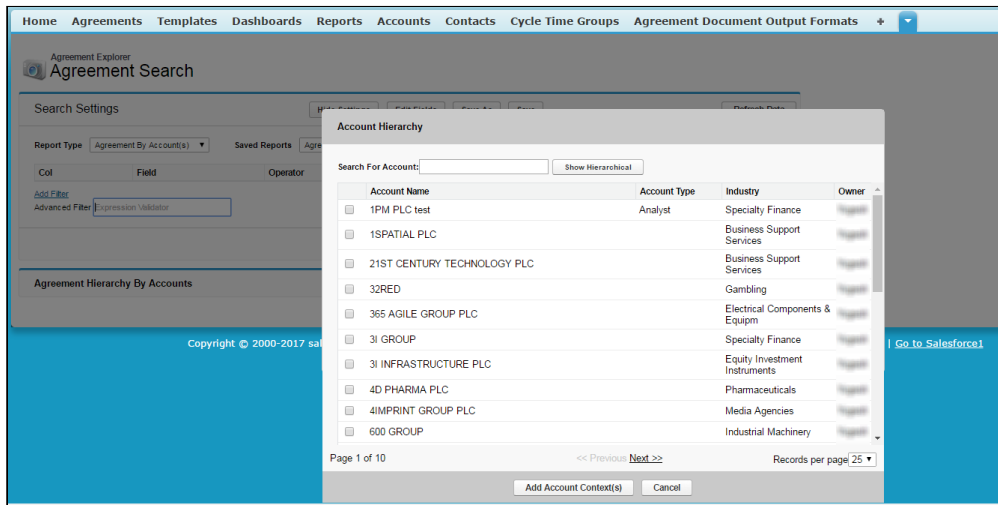


Search Settings are refreshed to display an **Account** lookup field.

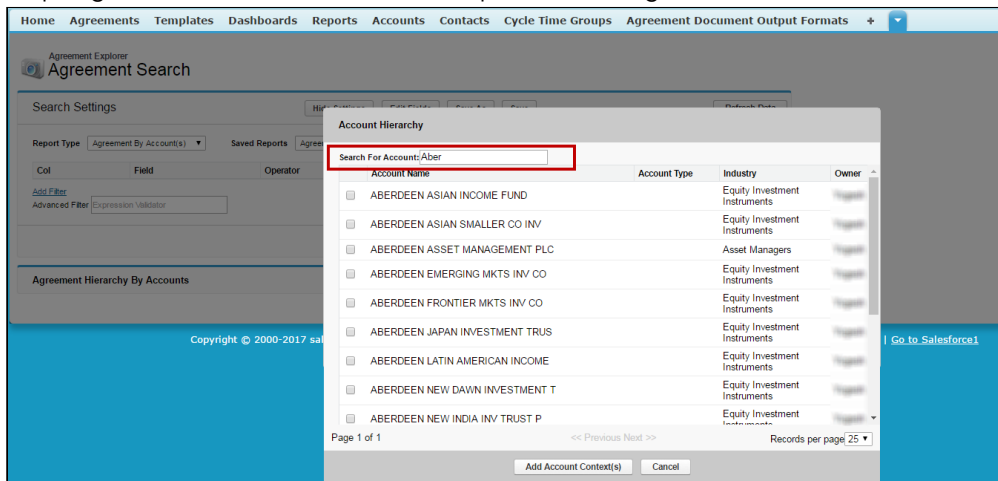
2. Click the **Account Lookup**  icon to display a lookup dialog of accounts organized in a hierarchy.



- 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.)



- 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.

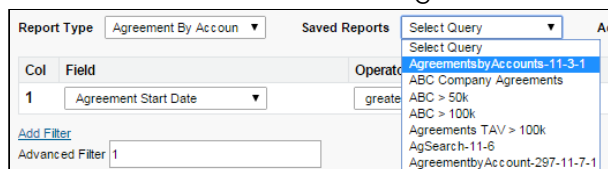


- Select one or more Accounts from the list and click **Add Account Context(s)**.
- Click **Go**. The report listing is refreshed to display a hierarchy of agreements organized by the account(s) specified using the current filter and fieldsets defined for the report.

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.



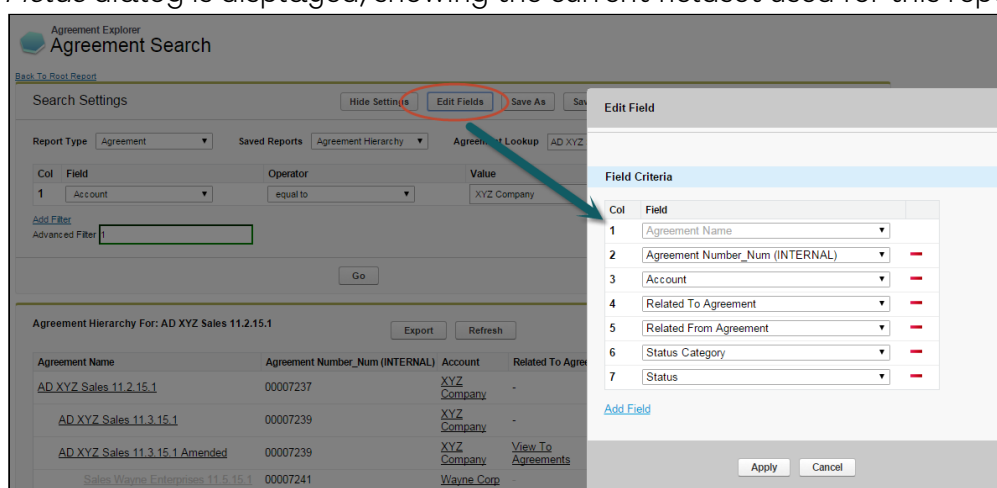
3. Click **Go**. The report listing is refreshed to display an Agreement Explorer report that matches the chosen saved report.

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.

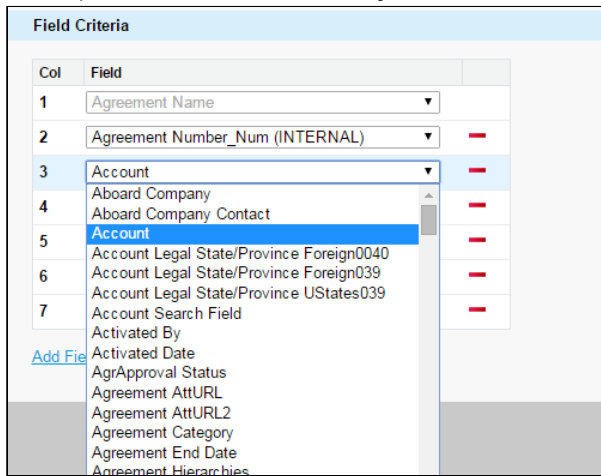
i FieldSets in Agreement Explorer reports are always defined explicitly for each report and change depending on settings for a specific report.

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.

- 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.



- 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.

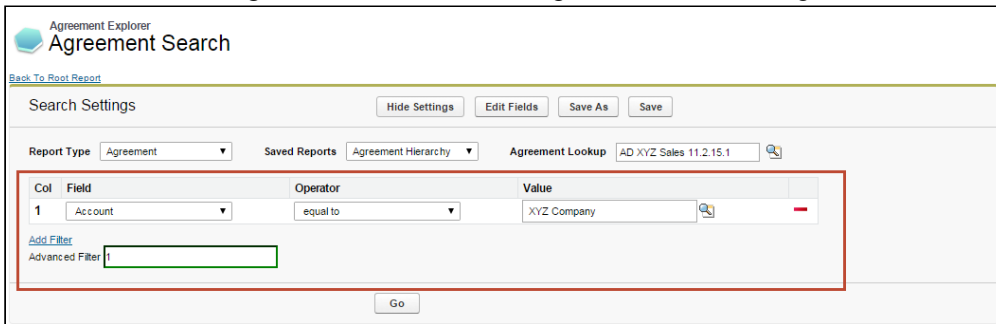
i Although Agreement Explorer report FieldSets can have up to 24 fields, only the first 12 fields can be displayed in the Agreement Explorer listing. When you export a report to an Excel spreadsheet, all fields and any data they contain are displayed. Keep this in mind when planning the sequence of fields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

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

To Change Filter Settings for a Report

Agreement Explorer report results can be constrained through the use of Filter Sets defined for any given report. When you first run an Agreement Explorer report, the report listing is displayed based on the defined Filter Set. You can change these Filter settings to return specific results based on a set of expressions you build.


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



Any already existing Filter Sets are displayed in this section.

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

| Field | Description | | | | | | | | |
|------------------------|--|----------|----------|----------------|------------------------|------------------------|--|------|---|
| Field | Choose a field from an alphabetical list of fields available for the Object (including lookup fields). For example, if you want to filter the agreement records where Agreement Name contains "MSA," select Agreement Name from this drop-down list. | | | | | | | | |
| Operator | Choose an operator based on the data type for the field you selected. In the example above, you would choose "contains." <table border="1" data-bbox="391 629 1426 1093"> <thead> <tr> <th>Datatype</th> <th>Operator</th> </tr> </thead> <tbody> <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> </tbody> </table> | 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 |
| 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 | | | | | | | | |
| 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**.

The screenshot shows the 'Search Settings' dialog box. At the top right, the 'Refresh Data' button is highlighted with a red rectangular box. Below the title bar, there are buttons for 'Hide Settings', 'Edit Fields', 'Save As', and 'Save'. The 'Report Type' is set to 'Agreement Search' and 'Saved Reports' is set to 'Default Agreement Search'. A table below shows a filter rule with the following columns: 'Col' (1), 'Field' (Agreement Start Date), 'Operator' (greater than or equal to), and 'Value' (11/23/2015). There is also an 'Add Filter' link and an 'Advanced Filter' input field with the number '1'.

3. Return to the **Agreement Explorer** tab or Agreement or Account record and run the report.

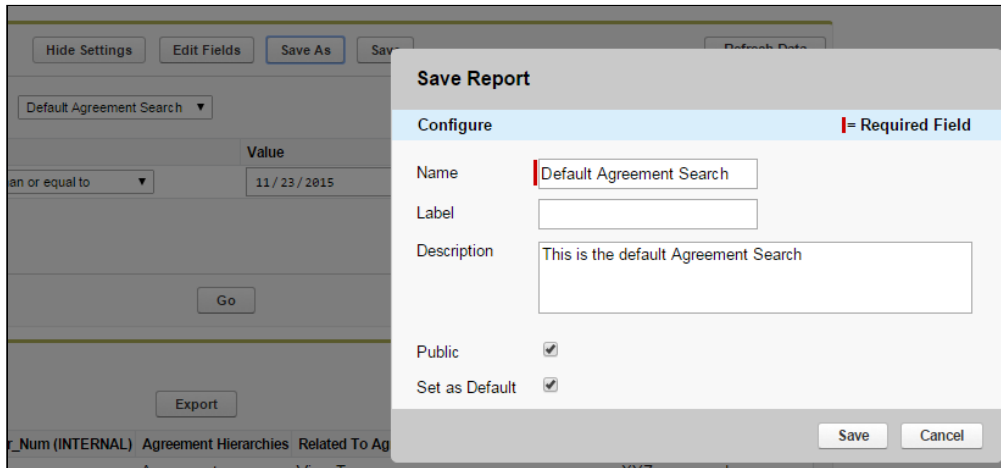
 Alternatively, the Contract Management administrator can schedule a job using the Apex Scheduler to refresh data such as agreement hierarchy and account hierarchy. For more information, see [Schedule Jobs to Refresh Agreement Data](#).

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).

Agreement Explorer
Agreement Search

Search Settings Show Settings Edit Fields Save As Save Refresh Data

Agreement Hierarchy For: AD XYZ Sales 11.2.15.1 Export

| Agreement Name | Agreement Number | Account | Related To Agreement | Related From Agreement | Status Category | Status |
|--|------------------|-------------|------------------------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 | 00007239.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 Amended | 00007239.1 | XYZ Company | View To Agreements | - | Request | In Amendment |
| Sales Wayne Enterprises 11.5.15.1 | 00007241.0 | Wayne Corp | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239.2 | XYZ Company | View To Agreements | - | Request | In Amendment |
| AD ABC 11.9.15.1 | 00007247.0 | ABC Company | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239.3 | XYZ Company | View To Agreements | - | Request | In Amendment |

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

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.

| Agreement Name | Agreement Number | Agreement Hierarchies | Account | Relationship | Status Category | Status |
|------------------------|------------------|---------------------------------------|-----------------------------|---------------|-----------------|---------------|
| AD XYZ Sales 11.3.15.1 | 00007239.0 | Agreement Hierarchies | XYZ Company | Is Amended By | In Effect | Being Amended |

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).

Agreement Explorer Agreement Search

Search Settings Show Settings Edit Fields Save As Save Refresh Data

Agreement Hierarchy For: AD XYZ Sales 11.2.15.1 Export

| Agreement Name | Agreement Number | Account | Related To Agreement | Related From Agreement | Status Category | Status |
|--|------------------|-----------------------------|------------------------------------|--------------------------------------|-----------------|---------------|
| AD XYZ Sales 11.2.15.1 | 00007237.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 | 00007239.0 | XYZ Company | - | View From Agreements | In Effect | Being Amended |
| AD XYZ Sales 11.3.15.1 Amended | 00007239.1 | XYZ Company | View To Agreements | - | Request | In Amendment |
| Sales Wayne Enterprises 11.5.15.1 | 00007241.0 | Wayne Corp | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239.2 | XYZ Company | View To Agreements | - | Request | In Amendment |
| AD ABC 11.9.15.1 | 00007247.0 | ABC Company | - | - | Request | |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239.3 | XYZ Company | View To Agreements | - | Request | In Amendment |

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

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.

Agreement Explorer Agreement Search

[Back To Root Report](#)

Search Settings Show Settings Edit Fields Save As Save Refresh Data

Agreements Related FROM: AD XYZ Sales 11.3.15.1 Export

| Agreement Name | Agreement Number | Agreement Hierarchies | Account | Relationship | Status Category | Status |
|--|------------------|---------------------------------------|-----------------------------|------------------|-----------------|--------------|
| AD XYZ Sales 11.3.15.1 Amended | 00007239.1 | Agreement Hierarchies | XYZ Company | Is Amendment For | Request | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended Amended | 00007239.2 | Agreement Hierarchies | XYZ Company | Is Amendment For | Request | In Amendment |
| AD XYZ Sales 11.3.15.1 Amended x3 | 00007239.3 | Agreement Hierarchies | XYZ Company | Is Amendment For | Request | In Amendment |

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.

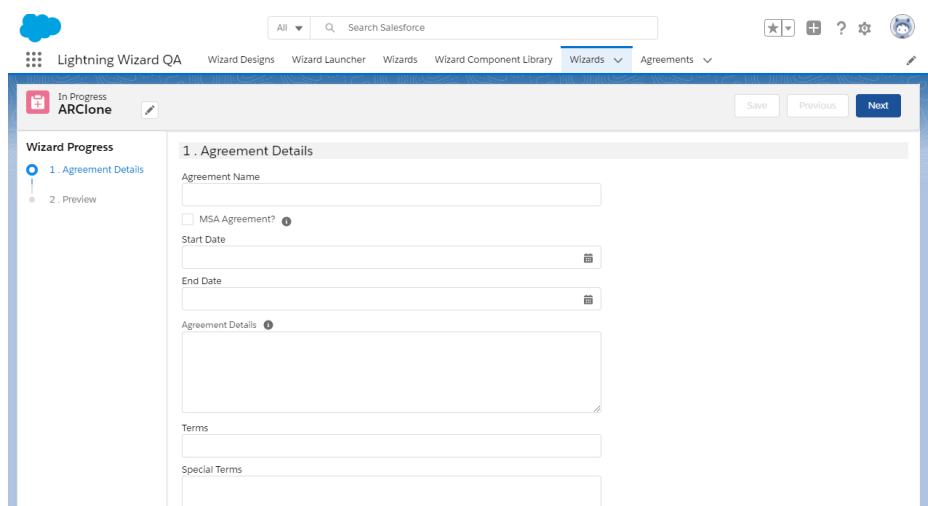
For information on creating Wizards using the Wizard Designer, see [Contract Wizard](#).

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

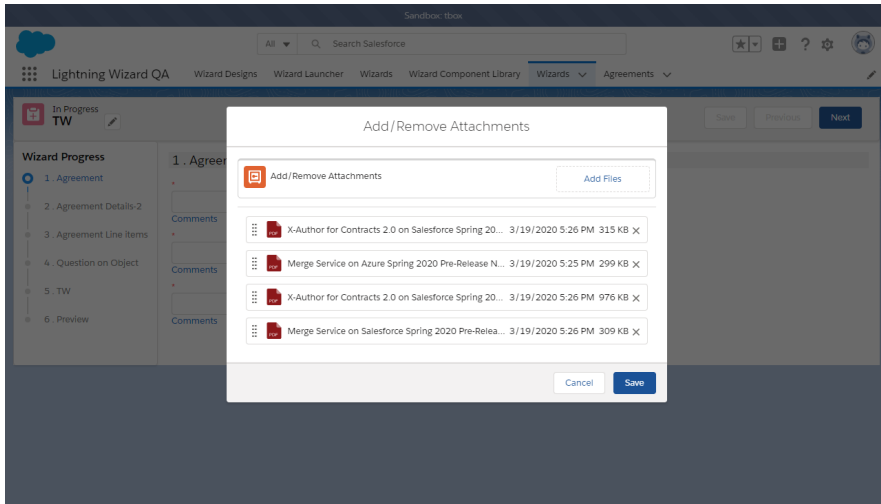
You must fill in all the required fields on the current wizard page before clicking **Save**. If a lookup field is configured in the wizard design, it will appear as a search field in the wizard.

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.

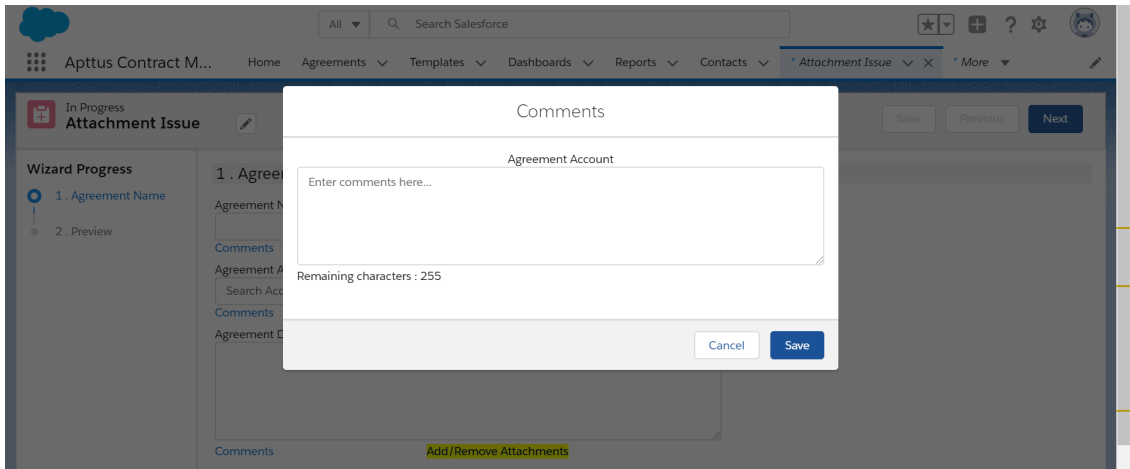
- Note** After uploading documents, you can see the number of documents uploaded beside Add/Remove Attachments. When you hover over Add/Remove Attachments, you can see the list of uploaded documents.

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**.

i 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:

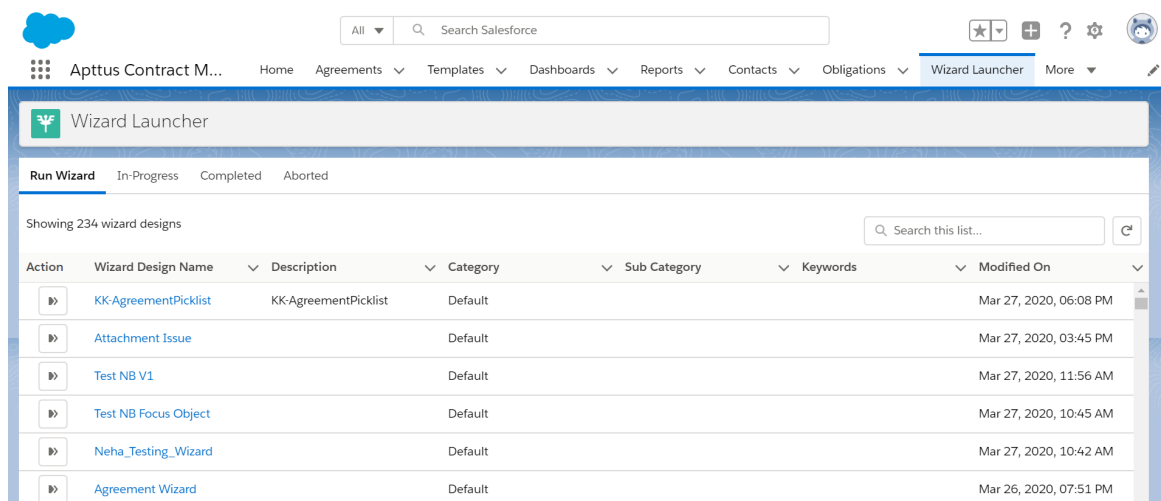
Prerequisite

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.

Search Salesforce

LWC Wizard 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

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

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

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

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.

The screenshot shows the Salesforce Lightning interface for a Note record titled "NR_18March Notes". The record is located within the "Notes & Attachments" related list of an Agreement record. The "Details" section is expanded, showing the following information:

| Information | |
|--------------------|--|
| Title | NR_18March Notes |
| Parent | NEha_001 |
| Body | This record was created from Wizard NR_18March, Runtime a2405000000To3tQAC |
| Created Date | 3/19/2020 2:41 PM |
| Last Modified Date | 3/19/2020 2:41 PM |
| Private | <input type="checkbox"/> |
| Note Owner | [User Avatar] |
| Created By | [User Avatar] |
| Last Modified By | [User Avatar] |

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 <i>Draft</i> version of an agreement document based on the template set up for the agreement type. The draft agreement is rendered in the 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 | <p>Generates the first version of an agreement document and attaches a copy of the same to the agreement record.</p> <p>When you initiate the Generate action, you are navigated to an intermediary screen to select additional information about the document to be generated. Select 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.</p> <p>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.</p> <p>You can:</p> <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects. |
| Availability | If Status Category = In Effect |
| 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 (<i>nnnn.1, nnnn.2, and so on</i>) after doing a deep copy of the agreement fields and related objects. |
| Availability | If Status Category = In Effect |
| 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 | <ul style="list-style-type: none"> • Sets Status to Cancelled Request • If an Amendment is being Cancelled, sets Status Category of Original Agreement to In Effect and Status to Activated |
| Comments | |

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 | <ul style="list-style-type: none"> • DOCX - 150 MB (with or without Intelligent Discovery) • DOCX - 10 MB (with Intelligent Discovery using Conga AI) <div data-bbox="770 501 1426 665" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>i Extraction of large files is supported using Conga AI but the files take a long time during data extraction.</p> </div> <ul style="list-style-type: none"> • 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) <div data-bbox="770 954 1426 1117" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>i Extraction of large files is supported using Conga AI but the files take a long time during data extraction.</p> </div> <div data-bbox="726 1153 1426 1317" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>i Refer send for review or parallel review supported file size for further processing the imported document.</p> </div> |
| Import Supporting Document | <ul style="list-style-type: none"> • PDF - 1.8 GB (multiple files) • PDF - 500 MB (single file) • DOCX - 150 MB <div data-bbox="726 1503 1426 1666" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>i Refer send for review or parallel review supported file size for further processing the imported document.</p> </div> |

| Use Case | File Size Limit |
|---|---|
| Send for Review or Parallel Review | <p>Sending for review</p> <ul style="list-style-type: none"> • DOCX - 150 MB or 400 pages (whichever is the greater) <p>Reply to the review email with a single reviewed document</p> <ul style="list-style-type: none"> • DOCX - 10 MB <p>Reply to the review email with multiple reviewed documents</p> <ul style="list-style-type: none"> • DOCX - 25 MB (combined file size of reviewed documents) <p>Upload Reviewed Document</p> <ul style="list-style-type: none"> • DOCX - 150 MB |
| Send for Signature | <p>Sending for signature</p> <ul style="list-style-type: none"> • DOCX - 150 MB • PDF - 1.8 GB (multiple files) <p>Upload Signed Document</p> <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • DOCX - 150 MB • PDF - 2 GB |
| Send for MS Team Review | 10 MB (<i>Limited by MS Teams</i>) |

| Use Case | File Size Limit |
|---------------------|--|
| Activate | <ul style="list-style-type: none"> • DOCX - 150 MB • PDF - 2 GB (multiple files) • PDF - 500 MB (single File) |
| Clone, Amend, Renew | <ul style="list-style-type: none"> • DOCX - 150 MB • PDF - 2 GB (multiple files) • PDF - 500 MB (single File) <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i Cloning, amending, or renewing agreements with large files impacts the storage space as duplicate copies of the large files are created.</p> </div> |

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 (<i>Limited by Force.com / Classic-Apex</i>) |
| Importing an agreement document through Intelligent Import | 200 MB (<i>Limited by Kira</i>) |
| Sending agreement documents for review, wet signature, or parallel review | 10 MB (<i>Limited by Email template object</i>) |
| Emailing agreement attachments or emailing in-effect view documents | 300 MB |
| Sending an agreement document for Microsoft Teams Review | 10 MB (<i>Limited by MS Teams</i>) |
| Activating an agreement | 15 MB (<i>Limited by Force.com governor limits while copying a file</i>) |
| Merging documents | 25 MB |

| Use Case | File Size Limit |
|---|-----------------|
| Searching agreement documents | 10 MB |
| Uploading a document to Contract Management from KIRA (XAJIS 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 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. |

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 | <p>The <i>API reference</i> 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.</p> |
|-------------------------------|--|

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 (WSDL) 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 <code>true</code> (or 1) or <code>false</code> (or 0) value. |
| Data object | The Data Object field is an ID type and is represented by <code>CPQ.nndObj</code> 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 | <p>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.</p> <p>For some objects, this field may also be a <code>referenceType</code> value, which contains the ID value for a related record. They are identified by field names ending in 'Id', such as <code>priceListId</code>. The ID field acts like foreign keys and their values can be changed using an <code>update()</code> call.</p> |
| 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, <code>city</code> may be limited to 50 characters, while <code>AddressLine1</code> 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

Apttus recommends that you work with Apttus 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 Apttus 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. Apttus 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](#)

- To generate the Apttus Web Services WSDL
- Connecting to Conga CLM
 - To connect to Apttus Web Service using SoapUI

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 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=a1p300000008XKUA2


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 Apttus 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 you 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.

| | | |
|--------------------|-------------------------|--------|
| Edit WSDL Security | AgreementWebService | Apttus |
| Edit | AgreementWebServiceTest | Apttus |
| Edit | AsyncMergeCall | Apttus |
| Edit | AsyncMergeCallFactory | Apttus |
| Edit | AsyncMergeCallJob | Apttus |

- Right-click on the page and select **View Page Source**. Copy the XML content to any text editor.
- Save the file with the extension **.wsdl**.
- Open SoapUI (or wherever is required on your development platform).
- 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 Apttus, please make sure to have your production or test org credentials on hand (username and password).

To connect to Apttus Web Service using SoapUI


- Open SoapUI. Go to **File > New SOAP Project**.
- Enter a name for the project.
- Click **Browse**. Navigate to the saved Enterprise or Partner WSDL file that you downloaded and click **Open**.
- Click **OK** to close the project window.
- 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.
- 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 password 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 Apttus 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](https://www.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](#)
- [publishToChatterRepository](#)[publishToDocumentRepository](#)

Prerequisite

You must ensure that the Status Category for the Agreement record is In Signatures or In Filing.

| API | Signature |
|--------------------------------|---|
| <code>activateAgreement</code> | <i>webservice static Boolean activateAgreement(Id agreementId, List selectedDocIds, List removableDocIds)</i> |

| Request Parameters | | |
|------------------------------|----------|---|
| Name | Type | Description |
| <code>agreementId</code> | ID | The id of the agreement. |
| <code>selectedDocIds</code> | List<ID> | List of fully signed document ids. |
| <code>removableDocIds</code> | List<ID> | List of draft document ids that can be deleted. |

| Response Parameter | | |
|---------------------|---------|---|
| Name | Type | Description |
| <code>result</code> | Boolean | Indicates whether the agreement was activated successfully. |

Code Sample

| | |
|---|---|
| 1 | <code>Id agreementId = agreement.Id;</code> |
|---|---|

```

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

```

<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>00D0200000081Uh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm807.VdNoOTWwjGFxgbrF03ylztaIg6VvFL
_EeKVGaQccY</agr:sessionId>
    </agr:SessionHeader>
  </soapenv:Header>
  <soapenv:Body>
    <agr:activateAgreement>
      <agr:agreementId>a07020000008w9BAAQ</agr:agreementId>
      <agr:selectedDocIds>00P02000000IYA7EA0</agr:selectedDocIds>
      <agr:removableDocIds>0002000000Cc0LAAS</agr:removableDocIds>
      <agr:removableDocIds>0760000000Cc0GAAS</agr:removableDocIds>
    </agr:activateAgreement>
  </soapenv:Body>
</soapenv:Envelope>

```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apptus/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 | <i>webservice static Boolean publishToExternalRepository(Id agreementId, Id attachmentId)</i> |

| 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 |
|--|
| <pre> <soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:agr="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService"> <soapenv:Header> <agr:SessionHeader> </pre> |

```

    <agr:sessionId>00D020000008LUh!
AQYAEQEW..3LVJKVa9atZ.0B6NtzfwyA.27WJEFZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03yLztaIg6VvF1
_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="ht
tp://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 |
|---|--|
| <code>publishToChatterRepository</code> | <i>webservice static Boolean publishToChatterRepository(Id agreementId, Id attachmentId)</i> |

| 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 | <code>Id agreementId = agreement.Id;</code> |
| 2 | <code>Id attachmentId = AttachmentId;</code> |
| 3 | <code>Boolean response = Apttus.AgreementWebService.publishToChatterRepository (agreementId, attachmentId);</code> |

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>00D0200000081UH!
AQYAEW...3LVJKVa9atZ.0B6NtzfwyA.27WJEfZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03yLztaIg6VvFL
_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

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://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 | <i>webservice static Boolean publishToDocumentRepository(Id agreementId, Id attachmentId)</i> |

| 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 |
|--|
| <pre> <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.27WJEFZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03yLztaIg6VvFL _EeKVGaQccY</agr:sessionId> </pre> |

```

    </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/Apptus/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 | | <i>webService static Id selectFirstTemplateIdForAgreement(Id agreementId)</i> |
| 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>00D0200000081Uh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEFZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03ylztaIg6VvFl
_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="http://soap.sforce.com/schemas/class/Apttus/AgreementWebService">
  <soapenv:Body>
    <selectFirstTemplateIdForAgreementResponse>
      <result>a09R000000A1m7iIAB</result>
    </selectFirstTemplateIdForAgreementResponse>
  </soapenv:Body>
</soapenv:Envelope>
```

Terminating Agreements

The `terminateAgreementsAsync` API allows you to bulk terminate agreements based on the agreement status.

| API | Signature |
|---------------------------------------|---|
| <code>terminateAgreementsAsync</code> | <code>webService static Id terminateAgreementsAsync(List agreementIds)</code> |

| Request Parameters | | | |
|---------------------------|-----------------------------|-----------------------|-----------|
| Name | Type | Description | Required? |
| <code>agreementIds</code> | <code>List<ID></code> | 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 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>00D0200000081Uh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEFZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03yLztaIg6VvFL
_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/Apptus/AgreementWebService">
  <soapenv:Body>
    <terminateAgreement>
      <result>a09R000000A1m7iIAB</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 | <i>webservice static String updateSmartFieldsOnAgreementDocument(agreementId, Id documentId)</i> |

Prerequisite: You need to configure the Comply System Property—XAJIS 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>00D0200000081Uh!
AQYAQEEW..3lVJKVa9atZ.0B6NtzfwyA.27WJEFZds4IqJX8uzm807.VdNo0TWwjGFxgbrF03ylztaIg6VvFL
_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 | <i>webService static Boolean sendForSignature(Id primaryContactID, List emailCc, List emailBcc, List emailAdditionalTo, Id emailTemplatelId, Id agreementId, List attachmentIds)</i> | | |
| Request Parameters | | | |
| Name | Type | Description | Required |
| primaryContactID | 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 |
| emailAdditionalTo | list | The email ids of the recipients you need to send the email. | Yes |
| emailTemplateId | 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','test3@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','test11@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

```
<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!
ARUAQMbFkHvnVLw0oAiCDHaWEz0Bkjf6uEcSsGd4853e7wLfvv88oUmBtR0xy2BYEgdcP6IrMA1b9qJ7N3uDy
PC31sNPlfjs</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>00XA000000h9eQ</agr:emailTemplateId>
      <agr:agreementId>a070S000002I4J4QAK</agr:agreementId>
      <agr:attachmentIds>a1z0S00000u1hqQAA</agr:attachmentIds>
    </agr:sendForSignature>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apptus/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:

```
Apptus.MergeWebService.<Name of the Function>
where the name of the function is API Name and its parameters.
```

```
Apptus_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](#)

- [Generating a Document on Submit Request](#)
- [Generating a Document on Submit Request for a Standard Object](#)
- [Generating a Supporting Document](#)
- [Generating a Supporting Document on Submit Request](#)
- [Merging Multiple Documents to a PDF without PDF Protection](#)
- [Merging Multiple Documents to a PDF with PDF Protection](#)
- [Creating PDF](#)
- [Merging Proposal Documents into a single PDF Document](#)
- [Package Multiple Documents](#)
- [Merging Documents](#)
- [Regenerate Documents with Redlines](#)

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 | | <i>webService static Boolean appendToHeaderFooter(Id docId, String headerText, String footerText, String sessionId, String serverUrl)</i> | |
| 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

```
<soapenv:Envelope
  xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
  <soapenv:Header>
    <mer:sessionId>00D0200000081Uh!
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>00D0200000081Uh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
      <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</mer:serverUrl>
    </mer:appendToHeaderFooter>
  </soapenv:Body>
</soapenv:Envelope>
```

Example Response

```
<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 FXI documents, the document protection levels are reset when the header and footer are added. This API retains protection levels for FXI documents.

| API | | Signature | |
|------------------------------|--------|--|-----------|
| appendToHeaderFooter2 | | <i>webservice static Boolean appendToHeaderFooter2(Id docId, String headerText, String footerText, String pLevel, String sessionId, String serverUrl)</i> | |
| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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

```

<soapenv:Envelope
  xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
  xmlns:mer="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
  <soapenv:Header>
    <mer:sessionId>00D0200000081Uh!
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>00D0200000081Uh!
AQYAQBDMUfqKvLqcVtqEnsqWZ3CvH_9PAn553rGgepU1CKttbRUAm4C8FFgThrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
      <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</mer:serverUrl>
    </mer:appendToHeaderFooter2>
  </soapenv:Body>
</soapenv:Envelope>

```

Example Response

```

<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`, `sessionId`, `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 |
|-------------------------------|---|
| <code>applyPDFSecurity</code> | <i>webservice static Boolean applyPDFSecurity(Id docId, String sessionId, String serverUrl)</i> |

| Request Parameters | | | |
|------------------------|--------|---|-----------|
| Name | Type | Description | Required? |
| <code>docId</code> | ID | The id of the PDF document to apply security parameters to. | Yes |
| <code>sessionId</code> | String | The Salesforce session id. | Yes |
| <code>serverUrl</code> | 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>00D0200000081Uh!
  AQYAQBDMUfqKvlqcVtqEnsQWZ3CvH_9PAN553rGgepU1CKttbRUAm4C8FFgTHrzkd6juez5FF4NEryvZ8ibJC
  __d7TM.vxCY</mer:sessionId>

```



```

</soapenv:Header>
<soapenv:Body>
  <mer:applyPDFSecurity>
    <mer:docId>068R00000001Z56SIAS</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 | | <pre>webService static Id convertWordDocForAgreement(Id agreementId, Id docId, String docFileName, String docFormat, String pLevel, Boolean addWatermark, Boolean removeWatermark, String sessionId, String serverUrl)</pre> | |
| 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: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>RTF</i> • <i>PDF</i> | Yes |
| pLevel | String | The protection level to apply to the document. Valid values are: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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 | | |
|--------------------------------------|---|---|-----------|
| <code>convertAgreementWordDoc</code> | <i>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)</i> | | |
| 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: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>RTF</i> | Yes |
| pLevel | String | The protection level to apply to the document. Valid values are: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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 | <i>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)</i> |

| 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: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>RTF</i> | 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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 | <code>ID docId = 'a0Y61000002K6IR';</code> |
| 2 | <code>String docFileName = 'Agreement';</code> |
| 3 | <code>String docFormat = 'PDF';</code> |
| 4 | <code>ID sObjectId = '0016100000KvBHi';</code> |
| 5 | <code>String pLevel = 'Full access';</code> |
| 6 | <code>Boolean addWatermark = true;</code> |
| 7 | <code>Boolean removeWatermark = false;</code> |

```

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 | | <i>webservice static Id convertWordDocToPDF(Id docId, String docFileName, Boolean addWatermark, Boolean removeWatermark, String headerText, String footerText, String sessionId, String serverUrl)</i> | |
| 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

```
<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>00D0200000081Uh!
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>00D0200000081Uh!
AQYAQBDMUfqKvlqcVtqEnsqWZ3CvH_9PAN553rGgepU1CKttbRUAm4C8FFgThrzkd6juez5FF4NEryvZ8ibJC
__d7TM.vxCY</mer:sessionId>
      <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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 | | <i>webService static Id convertWordDocToPDF2(Id docId, String docFileName, Id sObjectId, String pLevel, Boolean addWatermark, Boolean removeWatermark, String headerText, String footerText, String sessionId, String serverUrl)</i> | |
| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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

```

<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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 | <i>webservice static Boolean enableAuthoring(Id sObjectId, String pLevel, List docIds, String sessionId, String serverUrl)</i> |

| 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 <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | 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() + '/'
7 services/Soap/u/50.0/' + UserInfo.getOrganizationId();
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 |
|--|
| <pre> <soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:mer=" http://soap.sforce.com/schemas/class/Apttus/MergeWebService"> </pre> |

```

<soapenv:Header>
  <mer:SessionHeader>
    <mer:sessionId>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 |
|--------------------------|---|
| <code>generateDoc</code> | <i>webService static Id generateDoc(Id templateId, Id agreementId, String pLevel, String docFormat, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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 | <i>webService static Id generateDoc2(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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 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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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:generateDoc>
  </soapenv:Body>
</soapenv:Envelope>

```

```

    <mer:sessionId>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 `templated` parameter and the object indicated by `sObjectId` and `sObjectType`.

| API | Signature |
|--------------------------------|---|
| <code>generateCustomDoc</code> | <i>webservice static Id generateCustomDoc(Id templated, Id sObjectId, String sObjectType, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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 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!
AQYAAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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_AWj0v</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/Apptus/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 | <i>webService static Id submitGenerateDoc(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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 |
|---|
| <pre> <?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"> </pre> |

```

<soapenv:Header>
  <mer:SessionHeader>
    <mer:sessionId>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwQIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwQIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 | <i>webService static Id submitGenerateCustomDoc(Id templateId, Id sObjectId, String sObjectType, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |

| Request Parameters | | | |
|--------------------|---------|---|-----------|
| Name | Type | Description | Required? |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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

```


10

```
ID callId =
Apttus.MergeWebService.submitGenerateCustomDoc(templateId,sObjectId,sObject
Type,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 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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
      <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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>a0G020000009fM1EAI</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 | <i>webService static Id generateSupportingDoc(Id templateId, Id agreementId, String pLevel, String docFormat, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> | Yes |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> | 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 | <code>ID templateId = 'a036100000Fha5D';</code> |
|---|---|

```

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

```

<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>00D0200000081Uh!
AQYAPYE.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:generateSupportingDoc>
  </soapenv:Body>
</soapenv:Envelope>

```

```

    <mer:sessionId>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWj0v</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 | <i>webService static Id generateSupportingDoc2(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> | | |
| 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,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 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>00D0200000081Uh!
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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WWqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
      <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</mer:serverUrl>
    </mer:generateSupportingDoc2>
```

```

</soapenv:Body>
</soapenv:Envelope>

```

Example Response

```

<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apptus/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 | <i>webService static Id submitGenerateSupportingDoc(Id templateId, Id agreementId, String pLevel, String docFormat, Boolean isDraft, String sessionId, String serverUrl)</i> |

| 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: <ul style="list-style-type: none"> • <i>Full access</i> • <i>Insert comments only</i> • <i>Insert comments and tracked changes only</i> • <i>Read only</i> • <i>Fill in form fields only</i> |
| docFormat | String | Indicates whether the document will be: <ul style="list-style-type: none"> • <i>DOC</i> • <i>DOCX</i> • <i>PDF</i> • <i>RTF</i> |
| 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 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_AWj0v</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>00D0200000081Uh!
AQYAQPYE.vw_Vh7FI.cV871nm9WwqIdhVINQJIL7PDNzr3fLVNdGjwk9qTJbDYIRoxbfpa44bpuIyeyVxEepP
xdubr_AWjOv</mer:sessionId>
    <mer:serverUrl>https://testmanaged--5s20minor.my.salesforce.com/services/
Soap/u/50.0/00D0200000081Uh</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/Apptus/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 |
|-----------------------------|--|
| <code>mergeDocsToPDF</code> | <code>WebService static Id mergeDocsToPDF(Id parentId, List docIds, String docFileName, String sessionId, String serverUrl)</code> |

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

```

<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!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
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>
    </mer:mergeDocsToPDF>
  </soapenv:Body>
</soapenv:Envelope>

```

```

    <mer:docFileName>Merged.PDF</mer:docFileName>
    <mer:sessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
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

```

<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="ht
tp://soap.sforce.com/schemas/class/Apttus/MergeWebService">
  <soapenv:Body>
    <mergeDocsToPDFResponse>
      <result>0690S0000000SvwcQAC</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 | <i>webService static Id</i> <i>mergeDocsToPDF2(Apttus.CustomClass.ActionParams mergeParams)</i> |

| 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 | <p>If true:</p> <ul style="list-style-type: none"> 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. <p>If false, you need to define the following parameters.</p> <table border="1" data-bbox="703 866 1182 1456"> <thead> <tr> <th colspan="5">Request Parameters</th> </tr> <tr> <th>S. No</th> <th>Name</th> <th>Type</th> <th>Description</th> <th>Required?</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>AdHeader</td> <td>Boolean</td> <td>If true, you need to define parameters from 2-6.</td> <td>Optional</td> </tr> </tbody> </table> | | | Request Parameters | | | | | S. No | Name | Type | Description | Required? | 1 | AdHeader | Boolean | If true, you need to define parameters from 2-6. | Optional | Yes |
| Request Parameters | | | | | | | | | | | | | | | | | | | | |
| S. No | Name | Type | Description | Required? | | | | | | | | | | | | | | | | |
| 1 | AdHeader | Boolean | If true, you need to define parameters from 2-6. | Optional | | | | | | | | | | | | | | | | |

| Request Parameters | | | | | | |
|--------------------|------|--------------------|-------------|-------------|---|---------------------------|
| Name | Type | Description | | | Required? | |
| | | 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 | | | | | |
| S. No | Name | Type | Description | Required? | |
| 5 | HeaderFontSize | Integer | The font size of the header text. | Yes if Add Header is true | |
| 6 | HeaderAlignment | String | The alignment of the header text. Supported values: Left, Right, Center | Yes if Add Header is true | |
| 7 | AddFooter | Boolean | If true, you need to define parameters from 8-12. | Optional | |

| Request Parameters | | | | | | |
|--------------------|------|--------------------|-------------|-------------|--|---------------------------|
| Name | Type | Description | | | Required? | |
| | | Request Parameters | | | | |
| | | 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 | | | | | |
| 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 | <code>public String docFormat { get; set; }</code> |
| 2 | <code>public String outputDocFileBasename { get; set; }</code> |
| 3 | <code>private Boolean protectOutputDocStatus;</code> |
| 4 | <code>public String protectOutputDocFlag { get; set; }</code> |

```

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

```
<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!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
3rLd9z6BjXv</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>0690S0000000SvnkQAC</cus:DocIds>
        <cus:DocIds>0690S0000000SvwIQAS</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>
      </mer:mergeParams>
    </mer:mergeDocsToPDF2>
  </soapenv:Body>
</soapenv:Envelope>
```

```

    <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!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
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>0690S0000000SvzCQAS</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 | | <i>webService static Id createPDF(Apttus.CustomClass.ActionParams params)</i> |
| 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

```

<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!
ARUAQGAA1VTGcAG1zxyImAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
3rLd9z6BjXv</mer:sessionId>
    </mer:SessionHeader>
  </soapenv:Header>
  <soapenv:Body>
    <mer:createPDF>
      <mer:params>
        <cus:DocFileName>Merged.PDF</cus:DocFileName>
        <cus:DocIds>0690S0000000Svj0QAS</cus:DocIds>
        <cus:DocIds>0690S0000000SvnkQAC</cus:DocIds>
      </mer:params>
    </mer:createPDF>
  </soapenv:Body>
</soapenv:Envelope>

```

```

    <cus:ParentId>a070S000002bSFzQAM</cus:ParentId>
    <cus:SessionId>00D0S0000000Pa8!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
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 | <i>webService static Id createPDFPackage(Apttus_Proposal.CustomClass.ActionPa rams params)</i> |

| 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 | <code>// Attachments</code> |
| 2 | <code>//</code> |
| 3 | <code>List<Apttus_Proposal.CustomClass.AttachmentInfo></code> |
| | <code>attachmentsInfoList = new</code> |
| | <code>List<Apttus_Proposal.CustomClass.AttachmentInfo>();</code> |
| 4 | <code>// Attachment: Primary</code> |

```

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

```

<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!
ARUAQJ53E09loYXezDoz9WV0JugDkLwI58ibwr3Iefz8bY7_HNQ5j3jV302ejFtvD2n1wEI_VL_78sOCL76iV
Z5ywpCZaAJs</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:Ti
tle>
        </cus:Attachments>
        <cus:DocFileName>PDF_Package.PDF</cus:DocFileName>
        <cus:DocIds>0690S000000Svj0QAS</cus:DocIds>
        <cus:DocIds>0690S000000SvnkQAC</cus:DocIds>
        <cus:ParentId>a070S0000002bSFzQAM</cus:ParentId>
        <cus:SessionId>00D0S0000000Pa8!
ARUAQJ53E09loYXezDoz9WV0JugDkLwI58ibwr3Iefz8bY7_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:createPDF>
  </soapenv:Body>
</soapenv:Envelope>

```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apptus/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 | <i>webservice static Id createWordPackage(Apptus.CustomClass.ActionParams params)</i> |

Request Parameters

| Name | Type | Description | Required? |
|-------------|---|---|-----------|
| ParentId | ID | The ID of the parent object associated with the result. | Yes |
| Attachments | List<Apptus.CustomClass.AttachmentInfo> | List of all documents in the order to be packaged. | Yes |

| Request Parameters | | | |
|---------------------|---------------------------------------|--|-----------|
| Name | Type | Description | Required? |
| ExternalLinks | List<Apttus.CustomClass.ExternalLink> | List of external links to be embedded in document. <i>(not currently supported)</i> | Yes |
| DocFileName | 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. <ul style="list-style-type: none"> 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 <i>headerText</i> and <i>footerText</i> 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 Session ID to use for callback. | Yes |
| SessionUrl | String | The Server URL to use for callback. | Yes |

| Request Parameters | | | |
|-------------------------|---------|---|-----------|
| Name | Type | Description | Required? |
| RetainInputHeaderFooter | Boolean | Indicates whether the merged document retains the existing header and footer of the original documents and page numbers are cumulative. | Optional |
| CumulativePageNumber | Boolean | Indicates whether the merged document page numbers are cumulative. | Optional |

i 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 | RetainInputHeaderFooter | CumulativePageNumber | AddAutoHeaderFooter | Result |
|----------------------------------|-------------------------|----------------------|---------------------|---|
| Documents with header and footer | True | True | False | <ul style="list-style-type: none"> 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 | True | False | <ul style="list-style-type: none"> The default footer is not added as the RetainInputHeaderFooter parameter is set to True. |
| Documents with header and footer | False | True | False | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> The default footer is inserted and the footer has cumulative page numbers. |
| Documents with header and footer | True | False | False | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 = attS0.Id;
6
7 attachments.add(attInfo);
8
9 Apttus.CustomClass.AttachmentInfo attInfo2 = new
   Apttus.CustomClass.AttachmentInfo();
10 attInfo2.Title = 'Agreement-2';
11 attInfo2.RecordId = attS02.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!
ARUAQJ53E09loYXezDoz9WV0JugDkLwI58ibwr3Iefz8bY7_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!
ARUAQJ53E09loYXezDoz9WV0JugDkLwI58ibwr3Iefz8bY7_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>

```

Example Response

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns="http://soap.sforce.com/schemas/class/Apttus/MergeWebService">
  <soapenv:Body>
    <createWordPackageResponse>
      <result>0690S000000T1GIQA0</result>
    </createWordPackageResponse>
  </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 | | <pre>webService static Id mergeDocuments(Apttus.CustomClass.ActionParams params)</pre> | |
| 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 | 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. <ul style="list-style-type: none"> 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 <i>headerText</i> and <i>footerText</i> 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? |
| RetainInputHeaderFooter | Boolean | Indicates whether the merged document retains the existing header and footer of the original documents and page numbers are cumulative. | Optional |
| CumulativePageNumber | Boolean | Indicates whether the merged document page numbers are cumulative. | Optional |

| Response Parameter | | |
|--------------------|------|---------------------------------------|
| Name | Type | Description |
| docId | ID | The id of the generated PDF document. |

Code Sample

| | |
|----|---|
| 1 | <code>{"sessionId":"00D0b000000DwSP!</code> |
| | <code>AQcAQ0VWzYqVxU8jt0XxaQJe43sDdhLe4fsuRXsVri9ztEp8huD1u8ugJ3XI02CwbVssgtPdwm</code> |
| | <code>A4cQWuRnvJHJAFjWJZYziX",</code> |
| 2 | <code>"SessionUrl":"https://yogi-dev2-dev-ed--c.na57.visual.force.com/services/</code> |
| | <code>Soap/u/50.0/00D0b000000DwSP",</code> |
| 3 | <code>"ParentId":"a010b00000k3f69AAA",</code> |
| 4 | <code>"sObjectId":"a010b00000k3f69AAA",</code> |
| 5 | <code>"Attachments":[{"RecordId":"0690b00000CBrXVAA1",</code> |
| 6 | <code>"Title":"test333.docx",</code> |
| 7 | <code>"docType":"application/vnd.openxmlformats-</code> |
| | <code>officedocument.wordprocessingml.document"},</code> |
| 8 | <code>{"RecordId":"0690b00000CBrXBAA1",</code> |
| 9 | <code>"Title":"test345.docx",</code> |
| 10 | <code>"docType":"application/vnd.openxmlformats-</code> |
| | <code>officedocument.wordprocessingml.document"}],</code> |
| 11 | <code>"ExternalLinks":[],</code> |
| 12 | <code>"DocFileName":"MergedDocument",</code> |
| 13 | <code>"AddWatermark":true,</code> |
| 14 | <code>"RemoveWatermark":false,</code> |
| 15 | <code>"AddAutoHeaderFooter":false,</code> |

```

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

```

<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!
ARUAQGAA1VTGcAG1zxyImAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
3rLd9z6BjXv</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>
    </mer:Params>
  </mer:mergeDocuments>
</soapenv:Body>
</soapenv:Envelope>

```

```

<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!
ARUAQGAA1VTGcAG1zxyLmAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
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 | | <i>webService static Id regenerateDocWithRedlines(Apttus.CustomClass.DocGenParam params)</i> | |
| 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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

```
<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!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZLP5TQivHy05biv
we.toaF9MrQ</cus:SessionId>
        <cus:SessionUrl>https://testmanaged--5s20minor.my.salesforce.com/
services/Soap/u/50.0/00D020000008Uh</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 |
|-------------------------------------|--|
| <code>initiateParallelReview</code> | <code>webService static void initiateParallelReview(Id attachmentId, Id agreementId, Id documentVersionDetailId, String emailSubject, String emailBody, List reviewersInfo)</code> |

| 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 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!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZLP5TQivHy05biv
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

```

<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 | <i>webService static void endParallelReview(Id reviewCycleId, String emailId, Id documentVersionDetailId, String comment)</i> | | |
| 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!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZlP5TQivHy05biv
we.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="ht
tp://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 | <i>webService static List getWordDocumentInfosForParentWithFiles(Id parentId)</i> | |
| 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!
ARUAQGAA1VTGcAG1zxyImAb1RJmiUnspu05dzL53Xsx3jVhYI3oWTqB2dqzdBeswmwj_I49aI6BgIM4ve01At
3rLd9z6BjXv</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">
```



```

<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>0680S000000SztHQAO</Id>
      <ContentSize>14391</ContentSize>
    </LatestPublishedVersion>
    <LatestPublishedVersionId>0680S000000SztHQAO</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 | <i>webservice static Boolean subscribeToDocumentLock(Id documentVersionId, Id agreementId, Id userId)</i> | | |
| 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 |
|---|
| <pre>id documentversionId = 'a6v0S0000009DEY'; id agreementId = 'a07020000008w9BAAQ'; id CurrentUserID = getCurrentUser().Id; Apttus.AuthorWebservice.subscribeToDocumentLock(documentversionId, agreementId, CurrentUserID);</pre> |

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 |
|---|
| <pre><?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></pre> |

```

    <aut:SessionHeader>
      <aut:sessionId>00D0S0000000Pa8!
ARUAQMLgPIx6FwqD3DCEs9oBPnTI2Gx9k0jH5wIL7WLW1sR1vNq1dI7oAxxG4EKbk5XBzRZLP5TQivHy05biv
we.toaF9MrQ</aut:sessionId>
    </aut:SessionHeader>
  </soapenv:Header>
  <soapenv:Body>
    <aut:subscribeToDocumentLock>
      <aut:documentVersionId>a6v0S0000009DEY</aut:reviewCycleId>
      <aut:agreementId>a07020000008w9BAAQ</aut:emailId>
      <aut:CurrentUserID>0050S0000002KSZwQA0</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 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. |

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](#).

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- In the top navigation, click the "Learn" tab and then click "Learning center" on the dropdown menu

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