X-Author for Contracts 2.0 on Salesforce

Spring 2020 User Guide

Table of Contents

About this Guide

With the X-Author for Contracts 2.0 User Guide, you can find out how Apttus X-Author for Contracts 2.0 (previously known as X-Author Contracts for Cloud) works and how you can manage your organization's and your customers' contracts.

Topic	Description
What's Covered	This guide walks the X-Author for Contracts 2.0 user through an entire contract lifecycle inside Microsoft Word while complying with approval workflows and using the latest terms and clauses from your legal playbook. It covers step-by-step instructions, and use cases for the features provided by X-Author for Contracts 2.0.
Primary Audience	Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, and contract reviewers
IT Environment	Refer to the latest X-Author for Contracts 2.0 on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the What's New topic.
Other Resources	• *Contract Management on Salesforce Administrator Guide*: Refer to this guide for installing and setting-up Contract Management in your organization. • *Contract Management on Salesforce User Guide*: Refer to this guide to set-up the entire contract management process.

This guide describes the following tasks:

- Creating a template
- Managing templates
- Creating offline agreements
- Using playbook
- Marking clauses and fields
- Using template expression builder
- Updating fields from Contract Management

Before using X-Author for Contracts 2.0, you must be familiar with the following:

- Basic Salesforce administration

- Microsoft Word
- Apptus terms and definitions

What's New

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

Document	Topic	Description
Spring 2020 (Rev A)	Updating Multiple Smart Fields in a Document	New topic.
Spring 2020	Support for Office 365	X-Author for Contracts 2.0 provides beta support for Office 365 online and is open to a limited audience. If you have any queries or you want to know more about the feature, please contact Apttus Product Management.
Winter 2019	Creating Offline Agreements	Modified topic. Added content about the ability to perform the parallel review for offline agreements.
	Importing Offline Agreements	Modified topic. Added content about the ability to perform the parallel review for imported offline agreements.
	Inserting Clauses	Modified topic. Added content for tracking clauses inserted as plain text.
	Tracking Clauses in your Agreement Document	Modified topic. Added content for tracking clauses inserted as plain text.
	Checking in an Agreement Document	Modified topic. Added details about the ability of administrators to control the availability of check-in options.
	Sending an Agreement Document for Parallel Review	Modified topic. Added details about the ability of administrators to control the availability of check-in options.
	Inserting Fields in a Template	Modified topic. Added content for searching fields while inserting fields in a template.
	Tracking Review Status	New topic. A new feature for this release.
	Creating New Templates	Modified topic. Added content for locale support while creating a template.

Document	Topic	Description
	Cloning a Template	Modified topic. Added content for locale support while cloning a template.
	Checking In Templates	Modified topic. Added content for locale support while checking-in a template.
	Defining Template Locale	New topic. A new feature for this release.
	Changing Field Format by Locale	New topic. A new feature for this release.
	Upgrading X-Author for Contracts 2.0	New topic. A new feature for this release.
	Logging into X-Author for Contracts 2.0	Modified topic. Added information about the new login UI.
	Installing Production X-Author for Contracts 2.0	Modified topic. Added details about the new installer.
	Installing Pre-Release X-Author for Contracts 2.0	New topic. A new feature for this release.
	Installing Pre-Release X-Author for Contracts 2.0 Without an Installer	New topic. A new feature for this release.
	Installing Production X-Author for Contracts 2.0 Without an Installer	Modified topic. Added new manifest file details.
Summer 2019	Localization	New topic. A new feature for this release.
	Use Case: Managing Localization	New topic. A new feature for this release.
	Comparing and Merging Agreement Documents	New topic. A new feature for this release.
	Unlocking Read Only Clauses	New topic. A new feature for this release.

Document	Topic	Description
	Restricting Agreement Document Check-In and Check Out	New topic. A new feature for this release.
	Sending an Agreement Document for Parallel Review	New topic. A new feature for this release.
	Working with Files	New topic. A new feature for this release.
Spring 2019	Preview Reconciliation	New topic. A new feature for this release.
	Hiding or Showing Smart Boundaries	New topic. A new feature for this release.
	Inserting Fields in a Template as a Table	New topic. A new feature for this release.
	Inserting Fields in a Template as a Section	New topic. A new feature for this release.
	Setting Segments in Templates	New topic. A new feature for this release.
Winter 2018	Making Fields Read Only in a Template	New topic. A new feature for this release.
	Refreshing Clauses in a Template	New topic. A new feature for this release.
	Opening an Agreement Document	Modified topic. This topic is updated to add information about the number of agreements displayed on logging in.
Summer 2018	Template Expression Builder	New topic. A new feature for this release.
	Setting Segments in Templates	New topic. A new feature for this release.
	Deleting Smart Elements	New topic. A new feature for this release.
	Promoting Clauses	New topic. A new feature for this release.

Document	Topic	Description
	Inserting Inline Clauses	Modified topic. This topic is updated to add information about the new inline clauses feature.
	Tracking Clause Activity	New topic. This topic is added for enhancement to Clause Tracking feature.
	Making Clauses Condition-based	New topic. A new feature for this release, as part of the Template Expression Builder feature.
	About Template Clauses	Renamed to About Template Clauses Menu.

About X-Author for Contracts 2.0

X-Author for Contracts 2.0 is a Microsoft Word add-in that lets you work on contracts and contract templates. The X-Author for Contracts 2.0 add-in helps contract administrators and legal users to streamline the process of creating and maintaining contracts and associated contract and clause templates. Using X-Author for Contracts 2.0, contract administrators can manage complex negotiation cycles with clause and contract templates easily.

X-Author for Contracts 2.0 provides support for versioning of agreements, where contract administrators can save redlined, clean, and final versions of an agreement in a Microsoft Word document opened either from Salesforce or locally. When saving final versions, you can also reconcile any terms that might have changed during the negotiation process. Finally, users can compare two versions of a contract and also merge versions into one agreement document.

X-Author for Contracts 2.0 also provides support for creating conditional text within a contract or clause template. This allows contract administrators to create sophisticated conditional clauses that can include or exclude certain text or clauses depending on how a conditional expression containing valid agreement related merge fields are evaluated.

Apttus X-Author for Contracts 2.0 allows a user to perform the following tasks:

- Work with agreements
    - Create or update an agreement
    - Check-in an agreement
    - Check-out an agreement
    - Lock or unlock agreement documents
    - Hide smart boundaries
    - Manage clauses
        - Playbook
            - Insert clauses as text
            - Insert clauses as smart
        - Unlock read-only clauses
        - Mark clauses
        - Unmark clauses
        - Edit marked clause
        - Promote marked clauses to the playbook
        - Track clauses in an agreement
        - Delete smart clauses or mark clauses for deletion
    - Manage fields

        - Validate fields
        - Mark fields
        - Update smart and read-only field values from Salesforce
        - Accept or reject field changes
        - Delete fields or mark fields for deletion
    - Compare and merge agreements
    - Send an agreement for parallel review
    - Restrict agreement document check-in and check-out
    - Track and manage review cycle
    - Work with offline agreements
        - Create offline agreements
        - Import third-party papers as agreements
    - Reconciliation
        - Preview reconcile
        - Reconcile smart fields and smart clauses
- Work with templates
    - Check-in templates
    - Check-out templates
    - Open templates
    - Clone templates
    - Fields
        - Insert fields
        - Insert fields as a table or section
        - Make fields smart
    - Playbook
        - Insert inline clause
        - Make inline clauses smart
        - Create condition on line clause
        - Mark smart clause
        - Make smart clauses non-smart
        - Refresh clause
    - Set segments (conditional or style)

Key Terminology

It is important to understand how terms are used when working with Apttus X-Author for Contracts 2.0.

Term	Definition
Agreements / Contracts	A contract (or an agreement) is an arrangement with specific terms, enacted between two or more entities, in which there is a promise to perform something in return for valuable consideration or benefit.
Clauses	Modular blocks of text that are used repeatedly. By adding these blocks to a library called a playbook, they can be reused continuously in multiple documents.
Document Lock/ Unlock	Locking a document prevents others from editing the document and checking in a new version at the same time you are working on it. Lock or Unlock (toggle) button is available on the X-Author for Contracts 2.0 or X-Author Templates ribbon.
Documents	The dynamically generated output from the merging of an agreement record's data in the CRM with the static text of a template.
Merge Fields	Static fields in a template which, at the time of agreement generation, take their value from the corresponding field in the Agreement record.
Offline Agreement Document	A document created directly in X-Author by taking an existing Word document that was created outside of Contract Management and had not previously been associated with an agreement.
Playbook	A repository of templates, clauses, sections, or supporting documents, which can be inserted in the template as inline text or smart content-controlled text.
Reconciliation	Reconciliation is a process that enables changes made to smart fields in an agreement document, outside of the CRM/ X-Author environment, to be reconciled with the data held in the Agreement record in the Contract Management. Values of smart fields and clauses can be reconciled when you check-in the agreement document in X-Author for Contracts 2.0.
Smart Fields	Editable fields with the content control property. You can change the value of a smart field in a generated agreement document. These values can be reconciled with the corresponding fields on the agreement record in the CRM.
Template	Blueprints to generate a variety of document types when merged with data from quotes or proposals.

Term	Definition
Read-only Fields	Read-only fields have content control borders (similar to smart fields) but are non-editable in a generated agreement document. You can update the value of an Update field in an agreement document only by using Update from CLM. Functionally, these fields lie between smart fields and merge fields. Read-only fields are not inline like merge fields and their values cannot be edited like smart fields.
X-Author for Contracts 2.0	A Microsoft Word add-in that enables the legal team of an organization to execute an entire contract lifecycle inside Microsoft Word.

Getting Started

The X-Author for Contracts 2.0 Add-In is designed for contract administrators and/or legal users to help streamline the process of creating and maintaining contracts and associated contract and clause templates. Using X-Author for Contracts 2.0, contract administrators can manage complex negotiation cycles with clause and contract templates easily. The X-Author for Contracts 2.0 Add-In is not a required component, but adds tremendous value to the contract administrator by leveraging the power of Apttus within Microsoft Word.

The X-Author for Contracts 2.0 Add-In provides support for versioning of agreements, where contract administrators can save redlined, clean, and final versions of non-standard language in a Microsoft Word document opened either from Salesforce or locally. When saving final versions, the X-Author for Contracts 2.0 Add-In also helps the user to reconcile any terms that might have changed during the approval process. Contract and Clause templates can also be managed, including the ability to insert, save as, and replace them to and from Apttus. Finally, users can compare versions of a contract.

The X-Author for Contracts 2.0 Add-In also provides support for creating conditional text within a contract or clause template. This allows contract administrators to create sophisticated conditional clauses that can include or exclude certain text or clauses depending on how a conditional expression containing valid agreement related merge fields or FX2 fields are evaluated.

This section covers:

- Installing Production X-Author for Contracts 2.0
- Installing Pre-Release X-Author for Contracts 2.0
- Logging into X-Author for Contracts 2.0
- Upgrading X-Author for Contracts 2.0

Installing Production X-Author for Contracts 2.0

X-Author for Contracts 2.0 is a Microsoft Word add-in that requires a package installer. Alternatively, your DevOps team may also provide you an X-Author Contracts manifest file which you can configure or install in your Mac system to start using X-Author Contracts. This section would describe how to install X-Author Contracts on your Mac system using both the installer or the manifest file.

To install the X-Author Contracts add-in

Prerequisite: Close all the open instances of Microsoft Word.

1. Go to https://community.apttus.com.
2. From the **Resources** dropdown, select **Install Center - Salesforce Only**.
3. In the Contract Management section, click **Download** available for X-Author for Contracts 2.0.
4. In the DOWNLOAD FILE window, click **Confirm Download**.
5. Navigate to the Downloads folder and double-click the **X-Author Contract on Mac pkg** file.
   A warning dialogue is displayed.
6. Click **Ok** on the dialogue.
7. Go to **Apple menu** > **System Preferences**.
8. Click **Security & Privacy**, then click **General**.
9. From the *Allow apps downloaded from* section, click **Open Anyway**.
   A dialog box is displayed.
10. Click **Open** on the dialog box.
11. Download the X-Author Contracts for Mac **pkg** file using the link provided by your Apttus representative.
12. Double-click the **pkg** file (right-click and Open if the file is untrusted).
13. Follow the installation instructions.
14. At the Installation Type step during installation, click **Change Installation Location...** and select **Install for me only.**
15. Click **Continue** to complete the installation.
    A dialog box is displayed.
16. According to your requirements, you can keep the installer or move it to trash.

To configure the manifest file in your system

> This is an alternate method of installing X-Author for Contracts 2.0. If you have an X-Author for Contracts 2.0 installer, you do not need to perform the steps described under this topic. You need to perform these steps only if you do not have an installer file and your Apttus representative has shared only the XML manifest file with you.

1. Download the manifest file provided by your DevOps team.
2. Copy the manifest XML file and paste it in the following folder location: **~/Library/Containers/com.microsoft.Word/Data/Documents/wef**
3. Close the Microsoft Word application on your system (if open) and open it again.

4. In Microsoft Word, go to **Insert > My add-in**.

You will see X-Author Contracts add-in.

Installing Pre-Release X-Author for Contracts 2.0

As you are installing Pre-Release X-Author for Contracts 2.0 for the first time, you need to perform following actions:

1. Go to https://apttusportal.force.com/community/ApttusInstallCenterPreRelease.
2. Follow the steps mentioned in Installing Production X-Author for Contracts 2.0.

Logging into X-Author for Contracts 2.0

Before you can work with your agreement documents in X-Author, you must log in to Contract Management.

Prerequisite

If you are a first-time user, you must update your mobile number in the mobile section of your profile.

To log in to X-Author Contracts

1. Launch Microsoft Word. Open a new document or the document you want to work with.
2. Launch the X-Author add-in as described in Installing X-Author for Contracts 2.0.
   The login panel opens.
3. Click **Login**.
   or
   Click the menu icon () and click **Login**.
   You are navigated to the Salesforce production login page.
4. Enter your production credentials (Username and Password) and click **Sign In**.
   You will be logged into the X-Author Contracts. The X-Author panel refreshes to display a list of agreement documents.

Note

On the login page, when you click **Log In To Sandbox** you are navigated to the Salesforce sandbox login page and you need to enter Sandbox credentials to sign in.

To log out of X-Author Contracts

1. Click the menu icon ( ).
2. Click **Log Out "<username>"** to logout.

Upgrading X-Author for Contracts 2.0

If you are an existing customer, Apttus X-Author for Contracts 2.0 package is automatically upgraded to the latest release without any intervention (silent auto-upgrade).

Working with Agreements

After you have checked out your document, you are ready to begin the negotiation and redlining process.

The following sections describe the features you can use in X-Author when working with agreement documents.

- Opening an Agreement Document
- Using Playbook
- Doc Clauses
- Doc Fields
- Checking in an Agreement Document
- Updating Fields from Contract Management
- Opening Agreements in Contract Management
- Creating Offline Agreements
- Importing Offline Agreements
- Tracking Clauses in your Agreement Document
- Localization
- Restricting Agreement Document Check-In and Check Out
- Working with Files
- Promoting Clauses to Playbook
- Comparing and Merging Agreement Documents
- Sending an Agreement Document for Parallel Review
- Tracking Document Review Status
- Deleting Smart Elements Using Delete or Backspace Key
- Updating Multiple Smart Fields in a Document

Opening an Agreement Document

To work with any version of an agreement document associated with an agreement record in Contract Management, you must open it directly in X-Author Contracts. There are three common ways for you to open a document, depending on how you are accessing the document itself. You can open your DOC or DOCX agreement document using one of the following methods:

- Search and open the document in X-Author for Contracts 2.0
- Download the document from Contract Management and open it using X-Author for Contracts 2.0.

After opening a document, only one user can work on the document at a time.

> ⓘ If you are using X-Author for Contracts 2.0 on MacBook Air, you might see an error message related to "Add-in memory usage" when you work with a document of size 2 MB or more. This is due to a limitation of Microsoft Word. You can continue working after closing this warning message. However, to avoid high memory usage related issues, Apttus recommends that you close any unused applications on your system while working with X-Author for Contracts 2.0.

To open or open and update an agreement document

1. In the **X-Author Contracts** pane, go to **Start tab > Search > Search Agreements**.

   > ⓘ If you have already downloaded the document from another location, open the document in Word. The document is automatically locked by you (You'll see a message saying 'Document is locked by you'). If the document is already opened by another user, you will not be able to work with it until it is checked in.
   > Maximum of 50 agreements are displayed in one instance in the X-Author Contracts pane. When you search agreements using filters, 20 agreements are displayed in one instance based on the search results and if you scroll further, 20 more agreements are displayed.

2. Enter the agreement name or number as the search term and click the **Search** icon (🔍).
3. From the search results, click the **Expand** icon (⌄) of the agreement you want to download. In the expanded description, click **Documents**. This opens the Agreement Details page that lists all the versions of the document.
4. To open an agreement document version, click the more icon (⋮) next to the version and click **Open**. Your document is downloaded.
   Open the downloaded document in Microsoft Word. The document is automatically opened and locked by you (You'll see a message saying 'Document is locked by you'). This means that your agreement is opened.
5. To open and update an agreement document version, click more icon (⋮) next to the version and click **Open And Update**. The selected document is downloaded.
   Open the downloaded document. You'll get a message saying 'Document is locked by you' and the X-Author Contracts pane directly opens the **Update from CLM** page. This

page lists all Smart and ReadOnly fields with current values in Contract Management. For more information, see Updating Fields from Contract Management.

Locking and Unlocking Documents

When you open a document in X-Author Contracts, the document is locked for editing and cannot be checked out by anyone else. Anyone with proper permissions for the document's agreement record can still view and/or download the document, but they cannot make edits and check the document back in while you have it locked (the Work and Finish tabs are disabled). You can always check the lock status of a document by clicking the **Lock Status** button. This opens the Lock Status page with the following information:

- **Agreement Name:** Shows the name of the agreement.
- **Document protection mode:** Shows the protection level of the agreement document. The values could be *Full Access, Insert Comment and Track Changes Only, Track Changes Only, Fill in form fields only and Read Only.*
- **Document locked by:** Shows the name of the user who has locked the document. If the document is locked by another user, this field will show the name of the user who has locked the document.
- **Locked date:** Shows the date and time of locking.
- **Release Lock** or **Acquire Lock**: This is a toggle button. If a document is already locked you can unlock it using the **Release Lock**. If you have accidentally unlocked a document, you can lock it again by clicking **Acquire Lock**.
- **Refresh Lock:** This button checks the current lock status of your document.
- **Cancel:** Takes you back to the previous screen that you were working on.

To release a document lock

Before you can release a lock on a document, it must be opened in X-Author Contracts.

1. From the X-Author pane, click the **Lock Status** button. The Lock Status page shows agreement details and information on the current document lock.
2. Click **Release Lock** on the Lock Status page.

The document page refreshes and shows the **Start** tab of X-Author Contracts. You cannot access the **Work** and **Finish** tabs of X-Author Contracts after releasing the lock. When you click the **Lock Status** icon, the **Acquire Lock** button replaces the **Release Lock** button in the Lock Status page.

> If you released a document lock by mistake and want to continue working with the document, go to the **Lock Status** page and click **Acquire Lock**.

Using Playbook

The Playbook allows you to access a library of previously defined clause templates in Apttus Contract Management for use with your document agreement type during negotiations. Instead of editing clauses already in the document or inserting static text, you can insert clauses from Playbook directly into the agreement document and track and manage changes to clause content as negotiations proceed.

> Unless explicitly stated, any mention in this guide of fields or clauses should be considered a reference to smart fields and clauses.

To use Playbook, go to **Work** tab in X-Author Contracts pane and select **Playbook** tab. You can use the Playbook in the agreement document to:

- Mark New Clause
- Mark
- Insert
- Insert Smart

To search clauses in the Playbook

1. In the X-Author Contracts pane, go to **Work** > Playbook.
2. Enter a search term in the **Search Clauses** text box and click the search icon to list all the available clauses.
3. If you need to add filter criteria for the clauses, in **Search Clauses**, click the clause filter icon ( ) to get filtering options. You can filter your clause search based on clause **Category, Subcategory, Locale, Language,** and **Type**.

Marking Clauses

During the process of negotiation, you may find a section of text that you would like to mark as smart. Mark document content as a clause when:

- You are with a third party offline agreement created or imported into the agreement record that contains language which should be tagged as clauses.

- An external party adds language to the agreement document that constitutes a clause.

To mark a clause

1. In the X-Author Contracts pane, go to **Work** > **Playbook**.
2. Highlight the content of the contract to be marked as a clause.
3. Search the clause you want to add or select the clause from the available clauses list and click the more icon ⋮ next to the clause name.
4. Click **Mark**.
   By marking the text as a clause in your agreement document, the text adopts the properties of the marked clause. You can even choose to replace text in the agreement with text from a pre-existing clause in your Playbook. When the agreement document is checked in and reconciled to the agreement record, information on marked clauses is added to the Agreement Clauses related list.

> Clauses can only be smart in the context of single generated or offline Apttus agreement document.

To mark a new clause

1. In the X-Author Contracts pane, go to **Work** > **Playbook**.
2. Highlight the content of the contract to be marked as a clause and click Mark New Clause in the Playbook tab.
3. In the Mark Clause form, specify the following fields for marking the clause. The clause will be automatically marked as a 1-off instance of the clause for this agreement.

Field	Description
Clause Name	Enter a new name for the clause.
Action	By default, *Inserted* is chosen and is Read-Only.
Category	Select a category for your clause.
Sub Category	Select a subcategory for your clause. Options in the list will change based on the category you selected.
Exception	Select a term exception record from the drop-down list to associate with your clause.

Field	Description
Risk Rating	Select an appropriate risk rating for your clause. Valid values are: • Green • Red • Yellow
Materially Significant	Select this check box if you want to make your clause materially significant.
Clause Text (Selected)	This text area shows the selected text which you want to mark as a clause.

> Scroll past the Clause Text to view additional fields and buttons required to mark the clause.

4. Click **Save** to apply Apttus clause properties to the highlighted content and mark the content as a smart clause. When you check in and reconcile your agreement document, the clause will be displayed as inserted in the **Agreement Clauses** related list and is listed in the Document panel under **Clauses**.

Your clause is successfully marked and acquires content control border like the other smart clauses.

After inserting the clause, you can go to **Work tab** > **Doc Clauses** to confirm that the clause is now recognized in the document. When you check in the document, any smart clauses can be reconciled to the agreement and information of the inserted clause is added to the Agreement Clause related list on the agreement record.

> If you decide you want to unmark a clause during the same session in which you marked it, you must use the Doc Clauses tab to remove Apttus clause properties.

Inserting Clauses

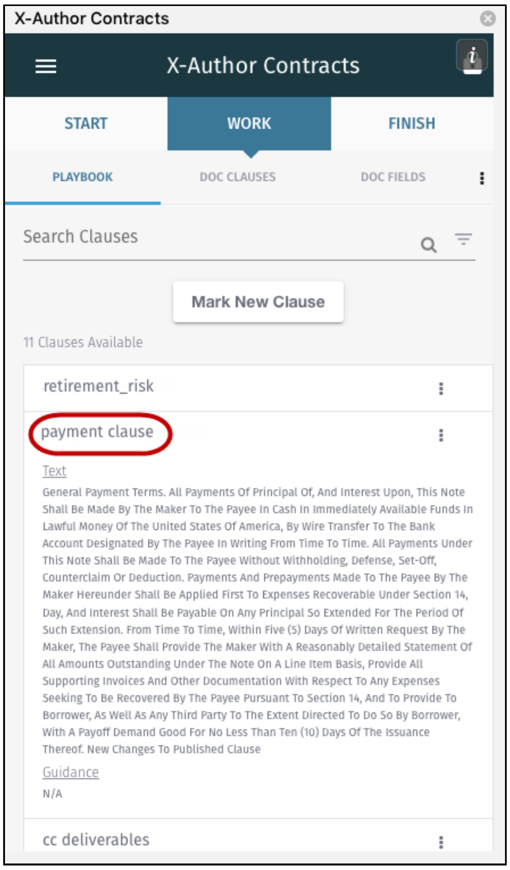
Clause content typically includes text, smart fields, read-only fields, merge fields, MS-Word tables, and style segments. You can insert a clause from the Playbook into a document in two different ways, as described below.

- **Inserting as an inline clause:** An inline clause is a clause which does not have a content-control border around it. The inline clause contains static text and the content of the clause cannot be edited in an agreement document. Moreover, when you insert an inline clause it is not recorded in the **Doc Clauses** list and the clause reconciliation page. If you insert a clause containing smart fields as an inline clause, the values in the smart fields are converted to plain text and do not have a content-control border.

- **Inserting as a smart clause:** A smart clause is a clause with content-control border. A smart clause contains text that can be edited in an agreement document. When you insert a clause as smart, you can see it in the clause list of the **Doc Clauses** tab of X-Author Contracts. Additionally, when you make changes to the content of a smart clause, those changes are tracked through redlines and you can see the changes recorded on the clause reconciliation page.

> When you insert an agreement clause into a document, it is only valid for that specific agreement document.

To view the content of a clause listed in the Playbook panel, click the **Clause Name**. A section displaying the text of the clause is displayed below the clause list. Click the clause text to scroll.



To insert a clause

1. In the X-Author Contracts pane, go to **Work > Playbook > Search Clauses**.

2. In **Search Clauses**, click the search icon to list all the available clauses or enter a search string to search a specific clause. You can also click clause filter icon to get filtering options. You can also filter your clause search based on clause **Category, Subcategory, Locale, Language,** and **Type**.
3. In the agreement document, place your cursor at the point of insertion.
4. Select the clause from the **Playbook** pane, click more icon next to the clause name and click **Insert** to insert the clause as an inline clause (or non-smart clause) in your document.
   OR
   Select the clause from the **Playbook** pane, click more icon next to the clause name and click **Insert Smart** to insert the clause as a smart clause in your document.

You get a success message and if you have selected **Insert Smart**, the inserted clause is marked as a smart clause (shown with a grey border). The text of the inserted clause appears redlined in the agreement document if the agreement's protection level is set to *Insert Comments and Track Changes*.

If you have inserted the clause as smart, you can go to **Work** tab **> Doc Clauses** to confirm that the clause is now recognized in the document. When you check in the document, any smart clauses can be reconciled to the agreement and information of the inserted clause is added to the **Agreement Clause** related list on the agreement record.

If you insert an inline clause as text and check in with any save option, you can view the clause entry in the Contract Management Agreement Clause related list with action as InsertedAsText.

If you insert an inline clause as text inside a smart clause and check in with any save option, you can view the clause entry in the Contract Management Agreement Clause related list with action as Modified.

To learn how the Agreement Clause related list is populated with each insert, modify and delete action, refer to the *Apttus Contract Management Administrator Guide*.

Preview Reconciliation

The preview reconciliation feature allows you to preview the difference between the current or modified value in the document and the Contract Management values. The following tasks are available for reconciliation:

- Modify a smart field
- Mark a field
- Modify a marked field
- Modify a smart clause
- Insert as a smart clause

- Modify a marked clause
- Mark a clause for deletion

To preview reconciliation

1. Go to **Work tab > Preview Reconcile**. If you do not see Preview Reconcile under the **Work** tab, click the more icon (⋮) and from the menu, select **Preview Reconcile**.
   The Preview Reconcile tab displays all the modified smart fields, modified mark fields, and new marked fields. Review the CLM Value and Current Value of the changed smart fields in your document.
2. Click **Next**.

   > If you have only one change in the agreement document, the **Cancel** button is displayed instead of the **Next** button.

3. The Preview Reconcile tab displays the modified smart clauses, marked clauses, inserted clauses, and clauses marked for deletion. Expand a clause from the list to review the Original and Edited content of the clause.
4. Click **Back** to navigate to the previous screen.

Hiding or Showing Smart Boundaries

Smart fields, smart clauses, read-only fields, and read-only clauses in an agreement document are represented in Microsoft Word as a content control, with a bounding box. You can control the visibility of bounding boxes using the **Hide Smart Boundary** and **Show Smart Boundary** options.

Prerequisite

Ensure that the checked-out document contains read-only fields, read-only clauses, smart fields, or smart clauses.

To hide smart boundaries in an agreement document

1. In the X-Author Contracts pane, go to **Work** tab and click the more icon (⋮).
2. Click **Hide Smart Boundary**.
   This hides all the smart boundaries.

Regardless of the **Hide/Show Boundary** option selected before checking in, the boundaries are displayed after checking out the document.

To see smart boundaries in an agreement document

1. In the X-Author Contracts pane, go to **Work** tab and click the more icon (⋮).
2. Click **Show Smart Boundary**.
   This shows all the smart boundaries.

Unlocking Read Only Clauses

A Read-Only clause is a noneditable clause marked as read-only in a template to restrict a user from editing the clause after a document is generated. When you generate an agreement document using a template containing Read-Only clauses, you cannot edit the Read-Only clauses in the generated document. You can view the Read-Only clauses in the Doc Clauses tab, but not on the Preview Reconciliation and Reconciliation pages. You can use the **Unlock** option to unlock read-only clauses in an agreement document if you have enabled the **XA_UnlockReadOnlyClause** permission.

Prerequisite

You must have **XA_UnlockReadOnlyClause** permission to view Unlock Clauses option in the Work Tab. For information on XA_UnlockReadOnlyClause custom permission, see *Contract Management on Salesforce Administrator Guide*.

To unlock or lock Read-Only clauses

1. Open a generated agreement document containing Read-Only clauses.
2. Go to **Work** tab > **Unlock Clauses**. If there are no read-only clauses in the agreement document and you select **Unlock Clauses**, an error message is displayed.
   All the Read-Only clauses in the agreement document become editable.
3. Make the required changes to the Read-Only clauses or delete Read-Only clauses.
   To delete a Read-Only Clause, see To mark a clause for deletion.
4. Go to **Work** tab > **Lock Clauses**.
   The Read-Only clauses become uneditable. You cannot undo changes after the Read-Only clauses are locked.

5. Check in the agreement document.
   If you do not lock Read-Only clauses and check in the agreement document, the Read-Only clauses get locked.

> **Note**
>
> You can view modified unlocked Read-Only clauses on the Reconciliation page or Agreement Clause tab.

Marking Fields

Using **Doc Fields**, you can mark small chunks of agreement document content as fields. When you mark content in an agreement document as a field, it becomes a smart field. Smart field values can be reconciled with data in the agreement record when the document is checked in, allowing changes made during negotiation to be accurately reflected and managed as data in Apttus CLM. Content marked as a field must map to the data type of existing fields in your agreement record.

Marking a field in a single agreement does not mark the field across all other documents for the same agreement record.

To mark a field in an agreement

1. Highlight the content of the contract to be marked as a field.
2. In the Work pane, click the more icon and select **Mark Fields** to open the Mark Fields form.
3. The **Mark Fields** form lists all the available CLM fields with their name and type that could be made smart. These fields are grouped into different categories according to the field type, like *Information, Key Dates, Miscellaneous*, etc.
4. Use Search Fields to enter the field name and search or scroll through the list of fields to select the field to be applied to the selected text.
5. Click the more icon next to the field name and click **Mark Field**. You will get a confirmation message.
6. Select **Mark** in the confirmation message to mark the selected text as a smart field.

> **Note**
>
> Make sure the format of the text you are marking matches the data type you are mapping to. You will receive an error if the text is not valid for the field type you choose.

You will get a success message and the selected text in the contract will acquire content control boundary. The content adopts the properties of the same field on the agreement record.

Doc Clauses

The **Doc Clauses** tab lists all smart clauses in the agreement document. You can take the following actions on clauses from the **Doc Clauses** tab:

- Navigate to a clause in the document
- Mark a clause for deletion
- Unmark a clause

To view a clause

1. Go to **Work > Doc Clauses** tab.
2. Click on a clause name in the list. The document scrolls to highlight the selected clause in the agreement document.

> Sections and supporting documents do not display in the list of clauses if they contain a smart field.

To mark a clause for deletion

1. Go to **Doc Clauses > Available Clauses** list.
2. Search the clause you want to delete or select the clause from the available clauses list and click the more icon ⋮ next to the clause name.
3. Click **Delete**.
4. You will get a confirmation message, select **Delete** again.

You'll get a message, "Your clause will be deleted on reconciliation" and the clause text in the document is marked with a ~~strikethrough~~. You can click **Undo Delete** from the more options next to the clause name, to remove the mark at any time in the same session.

Check-in the document and choose **Reconcile**. The content of the deleted clause is removed from the document and a "Deleted" entry is recorded in the Agreement Clause related list on the agreement record in Salesforce.

> For more information on tracking clauses and clause activity in your agreements, refer to the *Contract Management Administrator Guide* for the Salesforce platform.

Unmarking a Clause

Unmarking a clause removes Apttus clause properties and returns the text to a static state. If you decide you want to unmark a clause during the same session in which you marked it, you can use the **Doc Clauses** pane to remove Apttus clause properties. Note that, if you chose to replace the text with a clause from the library, you cannot choose to unmark the clause, it can only be deleted.

Pre-requisites

- You must have marked static text in the agreement document as a clause in the same session using Playbook.

To unmark a clause

1. Go to **Work** > **Doc Clauses**.
2. Search the clause using Search Clauses or select the clause from the **Available Clauses** list.
3. Select the marked clause and click the more icon.
4. Click **Unmark**.

You will see a confirmation message and the clause will be removed from the available clauses list too. The clause will also lose the content control border after your **Unmark** it.

Doc Fields

The **Fields** section of the Document Panel lists all smart fields in the agreement document. Use the Document Panel to take the following actions on fields in the document:

- View and change field values in the document
- Mark Fields
- Reject changed field values
- Validate field value format

- Mark fields for deletion

To view and change fields

1. Go to **Work > Doc Fields** tab. All fields are displayed in a list in the order they appear in the document. **Previous** (as of last check-in), **CLM**, and **Current** (document), values are displayed.
2. Click on a field in the list to snap to and highlight the field in the document.
3. To change the current value of a field, place your cursor in the field content control in the document and make changes. To view the updated field value in the **Doc Fields** list, click on some other tab and then click back on **Doc Fields** tab.
4. Click **Validate** to confirm that the new field value is valid for its corresponding data type.

> Changed field values are updated on in the agreement document upon check-in. If you choose to reconcile fields during check-in, they will also be changed on the agreement record.

Marking Fields

Using **Doc Fields**, you can mark small chunks of agreement document content as fields. When you mark content in an agreement document as a field, it becomes a smart field. Smart field values can be reconciled with data in the agreement record when the document is checked in, allowing changes made during negotiation to be accurately reflected and managed as data in Apttus CLM. Content marked as a field must map to the data type of existing fields in your agreement record.

> Marking a field in a single agreement does not mark the field across all other documents for the same agreement record.

To mark a field in an agreement

1. Go to **Work > Doc Fields**.
2. Highlight the content of the contract to be marked as a field.
3. In the Doc Fields pane, click the more icon and select **Mark Fields** to open the Mark Fields form.

4. The **Mark Fields** form lists all the available CLM fields with their name and type that could be made smart. These fields are grouped into different categories according to the field type, like *Information, Key Dates, Miscellaneous*, etc.
5. Use Search Fields to enter the field name and search or scroll through the list of fields to select the field to be applied to the selected text.
6. Click the more icon next to the field name and click **Mark Field**. You will get a confirmation message.
7. Select **Mark** in the confirmation message to mark the selected text as a smart field.

> Make sure the format of the text you are marking matches the data type you are mapping to. You will receive an error if the text is not valid for the field type you choose.

You will get a success message and the selected text in the contract will acquire content control boundary. The content adopts the properties of the same field on the agreement record.

Rejecting changes to a field

If changes have been made to smart fields in the document, you can choose to reject these changes in the same session prior to check-in.

To reject changes

1. Go to **Doc Fields** > list of doc fields.
2. Click on more options on the changed fields in the Doc Fields pane and select **Reject changes**.

The field value is reverted to its previous value prior to the change. The **Doc Fields** pane reloads to show the change.

Validating Fields

Use the **Validate** action to ensure that all smart fields in your document are in the proper format for their assigned data type (e.g., Date, Number, DateTime, selected values from picklists,etc.). The agreement document cannot be reconciled at check-in unless all fields in your document are valid.

To validate fields

1. Go to **Doc Fields**.
2. Click on the **Validate** button. If any fields are invalid, the field row in the Document pane will be highlighted in red.
3. Make any corrections to invalid fields as needed and click **Validate** again to confirm there are no invalid fields.

If all the fields are valid, you'll see a success message displayed at the top of the pane. You can now check in your document.

Marking Fields for Deletion

There will be times in the negotiation when a negotiating party wants to remove language from an agreement which contains a smart field. Depending on document protection settings, non-Apttus users can remove content from the agreement, but any smart field content removed will not remove the field itself. Follow the instructions on this page to **mark fields for removal**. You usually want to mark fields for removal when:

- An Apttus user marked static text as a field.
- A Template Admin marked a field as smart.
- You need to delete a smart clause from an agreement document.

To mark fields for deletion

1. Go to **Document > Fields**.
2. Right-click on a field and select **Mark for Deletion.**
3. Click **Yes** on the confirmation dialog that appears. The field is marked with a ~~strikethrough~~ in the document and the Document pane to denote that it has been marked for deletion.
4. **Check-in** the document and choose **Reconcile**. The field is removed from the document.

To unmark fields for deletion

If you decide in the same session that you want to keep a field in the document that you have already marked for deletion, follow these steps.

1. Go to **Document > Fields**.
2. Right-click on the field in the Document pane that you marked for deletion and select **Undo Delete**.

3. Click **Yes** on the confirmation dialog that appears.

Checking in an Agreement Document

Whether you are saving a redlined version, clean version, or final version, the process for each is similar and each makes use of X-Author's Check-In feature. Only Microsoft Word documents in DOC and DOCX format are supported for maintaining versions, opening and checking in agreement documents. When you check-in from X-Author, the document you are working on is converted back to the same document format as when it was first checked out.

Prerequisite

You can view With Redlines, Without Redlines, and Final - to be signed options according to the custom permissions available for your profile.

Custom permission in Contract Management	Save option available in X-Author for Contracts 2.0
XA_CheckinAsFinal	Final - to be signed, Without Redlines, and With Redlines
XA_CheckInWithoutRedlines	Without Redlines and With Redlines
XA_CheckInWithRedlines	With Redlines

If all the custom permissions are disabled, you can view all the Save Options. For more information on how to configure custom permissions, see *Contract Management on Salesforce Administrator Guide*.

To check in an agreement document

1. From the X-Author Contracts pane, click **Finish** tab. The Check-in page is displayed.
2. From **Save Options**, choose one of three options for saving the document:

Option at Check-in	Description
With Redlines	This saves a draft version of the agreement document with all markups and Redlines is used as the action in your org's configured default document naming convention. A DOCX version of the document is saved in **Notes & Attachments**. If Contract Document versioning is enabled, selecting this option creates a new version under the **Document Versions** related list in your Agreement record.
Without Redlines	This saves a draft version of the document without markups and is typically done before sending an agreement to a third party for review. Track changes/ redlines are automatically removed from the Word file and _Clean is used as the action in the configured default document naming convention. A DOCX version of the document is saved in **Notes & Attachments**. If Contract Document Versioning is enabled, selecting this option creates a new version under the **Document Versions** related list in your Agreement record.
Final - to be signed	This saves a version of the document without markups and also enables a PDF version of the document to be created. If this option is selected, a PDF file will be saved to the agreement's **Notes & Attachments** related list. By default, _Final is used as the action in the configured default document naming convention. If Contract Document Versioning is enabled, selecting this option creates a new version (DOCX) under the **Document Versions** related list in your Agreement record.

ⓘ When you select "Final - to be signed" as the check-in option, **Create PDF attachment** is automatically checked if you have the Comply System Property **Auto Enable PDF for Final Docs** enabled. For more information on Comply System Properties, refer to the *Contract Management Administrator Guide* on the Apttus Doc Portal.

3. In the **Agreement Name** field, enter the required name for the document or leave it as the name suggested by X-Author. The default name includes the agreement name, revision number, and version type. X-Author automatically saves the agreement in DOCX format.
4. Select the required watermark option.
    - Select **Include Watermark,** to add one to a non-final version. This option is available with the **With Redlines** and **Without Redlines** options.
    - **Include Watermark** is automatically deselected (greyed out) if you are saving the document as **Final - to be signed**.

> ⓘ If the document already contains a watermark, the watermark will be removed instead when this option is chosen.

5. Select **Reconcile Document** to synchronize the Salesforce Agreement object fields with those that were updated in the document. See Reconciliation for more details.
6. Select **Mark as private** to enable the *Private* indicator for this agreement (only for use in custom implementations- see the Apttus Contract Management Administrator Guide for more information).
7. Click **Finish** to confirm check-in of the document. If you have selected the Reconcile option, you will see **Save and Next** button which takes you to the reconciliation page.

The document is checked in to Salesforce and the new document version is downloaded from the agreement record. Close the document you just checked in (no need to save) and load the newly downloaded document to continue working with the agreement, if necessary.

> ⓘ If there are any invalid fields in your agreement, a message is displayed and the check-in is not completed. Return to Doc Fields to validate fields and make corrected as needed.

For information on enabling Contract Document Versioning and how it works, refer to the *Contract Management Administrator Guide* for the Salesforce platform.

Reconciliation

X-Author provides a reconciliation feature which enables changes made to smart fields in an agreement document, outside of the Salesforce/X-Author environment, to be reconciled with the data held in the Agreement record in Salesforce.

In a typical scenario where an agreement document is sent to an external party for negotiation, the external party will make changes to the document as part of the negotiation. If the changes to the document involve data belonging to the Agreement record, reconciliation provides the mechanism to ensure the values in the document and the Agreement record are reconciled.

To check in and reconcile smart fields and clauses

1. From the X-Author pane, click **Finish** to open the Check-In page.

2. Choose the **Save Options** for saving your document:
    a. To check in the document with redlines, choose *With Redlines*.
    b. To check in the document without redlines (clean), choose *Without Redlines*.
    c. To check in the document as final, choose *Final - to be signed*.
3. Select the **Reconcile** checkbox and click **Save & Next**.
4. This page shows all the smart field with changed values that are available for reconciliation. Review the **CLM Value** and **Current Value** of the changed smart fields in your document and click **Save & Next**.
5. This page shows the changed smart clauses that are available for reconciliation. Expand a clause from the list to review the **Original** and **Edited** content of the clause.

    > If you choose to check in the document without reconciling, changed smart field values will not be updated in the agreement record and changes to clauses will not be reflected in the Clauses related list in Contract Management. If you choose to check in the document with redlines, redlines and comments will be retained

6. Click **Finish** to check in the document with reconciliation.

> Agreement documents cannot be reconciled with the agreement record as long as invalid values exist in the document for smart fields. Go to **Doc Fields** pane to perform a validation and correct any invalid field values.

Updating Fields from Contract Management

Update from CLM is an option available in the Work tab that allows you to update smart fields and Readonly fields in your agreement document with the current values in Contract Management. **Update from CLM** updates all header, 2nd, and 3rd level smart fields located in your document, including:

- Smart and read-only fields in the body of the agreement document.
- Smart and read-only fields in sections.
- Smart and read-only fields in tables or repeating datasets.
- Smart and read-only fields in generated clauses.

> - If you choose to update fields from Contract Management, all changed smart field values and Readonly field values will be updated. You cannot select only specific fields.
> - Fields cannot be updated to an empty (null) value.

To Update from Contract Management

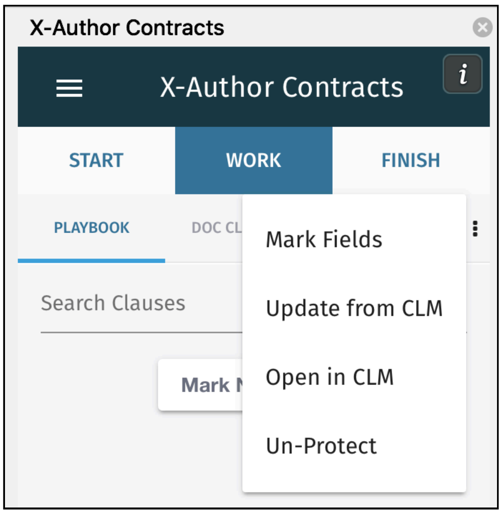
1. Check out your agreement document and go to **X-Author Contracts > Work tab** and click the more icon (⁝).
2. In the menu, click **Update from CLM** to display a dialog showing all header-level fields in the document. Field values that have been changed on the Apptus CLM record are highlighted in red.
3. Review the changed values and click **Update** to update the field values.
   You'll see a success message when the fields are updated in the agreement.

Opening Agreements in Contract Management

You can easily view the Agreement record associated with your document by choosing **Open in CLM** from X-Author.

To open an agreement in Contract Management

1. Connect to X-Author Contracts.
2. Open the agreement document for the agreement you want to view.
3. From the X-Author menu, hover over the menu icon (☰) and click **X-Author Contracts.**
4. Under the X-Author Contracts pane, click the **Work** tab.
5. In the Work tab, click more icon (⁝) and select **Open in CLM**.



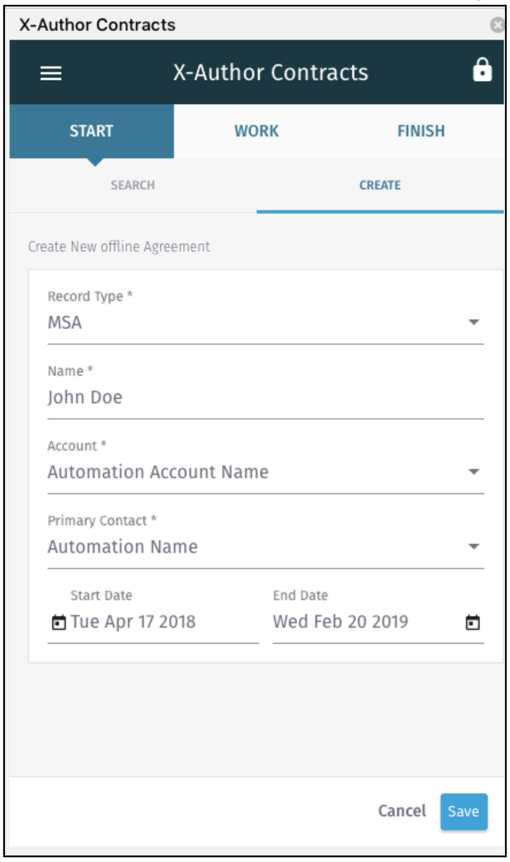
A separate browser window is opened and the agreement is loaded in Contract Management (You may be prompted to log in again to your Contract Management account in the browser).

Creating Offline Agreements

Offline Agreements can be created directly in X-Author Contracts, by taking a pre-existing Microsoft Word document that was created outside of CRM and has not previously been associated with an Agreement and checking it in. When you have a document open in Microsoft Word and you can create a new agreement record by checking it in as an offline agreement.

To create an offline agreement

1. Open the document in Microsoft Word and connect to X-Author Contracts.
2. Select the X-Author Contracts option from the left-hand menu and go to **Start** > **Create**. The Create New Offline Agreement page is displayed.



3. In the Create New Offline Agreement window, enter the following details (fields marked with an asterisk are required):

Fields	Description
Record Type*	Select the Record Type from the picklist.
Name*	Enter the agreement name.
Account*	Select the Account from the picklist.
Primary Contact*	Select the primary contact from the picklist.
Start Date	Select the start date of the agreement from the date picker.
End Date	Select the end date of the agreement from the date picker.

4. Click **Save**. You will see a confirmation message.

A new agreement record is created in Contract Management. If the Enable Document Versioning comply system property is enabled in Contract Management, the new agreement is available in Document Versions. If the Enable Document Versioning comply system property is not enabled and the Enable File comply system property is enabled, the new agreement is available as a type-file in the Notes & Attachments.
You can also send the offline agreement for review when the Parallel review comply system property is enabled. For more information, see Sending an Agreement Document for Parallel Review**.**

Importing Offline Agreements

Using X-Author Contracts you can import a document which has not previously been saved in CLM and attaches it to a pre-existing agreement record. Like creating a new agreement, when you choose to associate the document with a pre-existing agreement record, it is added to the **Documents** related list for that agreement. Unlike creating new offline agreement, importing an agreement offline does not create a new agreement record, but rather attaches your offline document to a pre-existing agreement record.

To import an offline agreement

1. With the document open in Microsoft Word, connect to X-Author Contracts.
2. Go to the **X-Author Contracts** pane > **Start** > **Search Agreements.**
3. In the **Search Agreements** field enter the full or partial agreement name and click the search icon to locate your agreement.
4. From the search result select the agreement name and click **Check In Offline**.

Your document is checked in offline and you can download the checked-in version of the agreement document. You can view the checked in agreement from Documents related list of your agreement record in Contract Management. The imported agreement does not have a template associated with it. You can also send the offline agreement for review when the Parallel review comply system property is enabled. For more information, see Sending an Agreement Document for Parallel Review.

Tracking Clauses in your Agreement Document

The **Clauses** related list on the Agreement record captures the clause activity for associated agreement documents during contract negotiation. You can open an agreement document in X-Author and make changes to it by inserting, modifying or deleting clauses. When you check-in that agreement document, new records are created in the **Agreement Clauses** Related List that reflects these changes. With each change made to the clauses, either from Playbook or to the new clause marked in an agreement document, you can see corresponding entries in the Agreement Clauses Related List of your agreement record in the Apttus CLM.

Agreement Clause activity is recorded in the related list during a negotiation when you insert, modify or delete a clause in the initial session or a subsequent session. A session can be defined as the time between opening a document in X-Author for Contracts 2.0 and checking it in. You can insert, modify or delete the content of a clause in an agreement document by doing any of the following:

User action in X-Author for Contracts 2.0	Trigger point in X-Author for Contracts 2.0	Agreement Clauses - Action entry in Contract Management
NA	NA	*Original* (after a document is generated)
Check-out a document	NA	NA
Modify a smart clause	Reconciliation	*Modified*
Delete a smart clause	Reconciliation	*Deleted*
Insert clause as smart in an agreement	Check-in with any save option	*Inserted*

User action in X-Author for Contracts 2.0	Trigger point in X-Author for Contracts 2.0	Agreement Clauses - Action entry in Contract Management
Insert clause as text in an agreement	Check-in with any save option	*InsertedAsText*
Modify smart fields in a smart clause	Reconciliation	*FieldChangedOnly*
Check-in a document as Final	NA	NA

Localization

You can define the locale of your templates in X-Author Contracts (Windows). The localization feature allows you to define locale settings for **Number**, **Currency**, **Precision**, and **Date** fields. You can generate a document in Contract Management using the template that you have created in X-Author Contracts (Windows) and check out or open the generated document in X-Author for Contracts 2.0 (MAC). X-Author for Contracts 2.0 supports multiple locales.

> **Note**
>
> You must create the template in X-Author Contracts (Windows) using the latest X-Author for Contracts Salesforce Template.
> *Enable Formatting* must be selected when the template is created, cloned, or checked in. For more information on localization and list of supported locale, see *X-Author Contracts User Guide*.

When you open a generated document in X-Author for Contracts 2.0, the following conditions are applicable for a localized agreement:

- If you import an offline agreement document, the default English (United States) locale settings are applied to the document.
- If you use the "Update From CLM" option, the values are updated from Contract Management in the document according to the locale settings of the template/fields.
- If you have Doc Fields in the document and validate them, the Doc Fields are validated based on the locale settings of the template or fields.
- If you update smart fields with locale settings, you can view the updates when you use Preview Reconciliation and Reconciliation options.

- If you have Mark Fields in the document, you need to enter the values in the default English (United States) format and the value is converted according to the template/ fields locale.
- If you insert a clause either by using the Insert or Insert Smart option, the document inherits the locale settings of the agreement template if the clause does not have any locale settings.
- If you insert a clause either by using the Insert or Insert Smart option, the document inherits the locale settings of the clause if the clause has locale settings.
- If you are connected to a multicurrency org, the currency is displayed based on the record level currency.

Use Case: Managing Localization

This topic describes how a template administrator can create a template using X-Author for Contracts (Windows) with Japanese locale, generate a document using the template, and review it in X-Author for Contracts 2.0 (MAC).

Prerequisite

- You must create the template in X-Author Contracts using the latest X-Author for Contracts Salesforce Template.
- You must disable the Enable Template Versioning property in the Contract Management Comply System Properties.

To define locale settings for a new template in X-Author for Contracts

1. Open Microsoft Word and click **Connect** on the X-Author Templates or X-Author Contracts ribbon and select **Manage Connections**.
2. In the Create a new connection section, enter a name for the connection and enter the host URL of your CRM in the Login URL field. The login URL is the URL of the CRM with which you want to connect.
3. Click the **X-Author Templates tab**.
4. Click **New**. The Specify Template Attributes dialog opens.
5. Enter the following values in the fields and then click **OK**.
    a. **Type**: Select Agreement
    b. **Business Object**: Select Apttus__APTS_Agreement__c
    c. **Locale**: Select Japanese
    d. **Enable Formatting**: Select the checkbox
    e. **Date Format**: Select yyyy'年'M月'd'日'
    f. **Currency Format**: Select Currency Symbol
    g. **Number Precision**: Enter 2
    h. **Currency Precision**: Enter 2

6. Navigate to X-Author Templates tab.
7. Paste the following content in the document:

```
This Master Service Agreement "Agreement" with XYZ corporation and has a start
date of "Agreement Start Date".
```

8. Select Agreement in the content and click **Insert Fields**.
9. Select Agreement Name and click **Finish**.
10. Select Agreement Start Date in the content and click **Insert Fields**.
11. Select Agreement Start Date and click **Finish**. Mark the Agreement Start Date field as smart.

> **Tip**
>
> The Control Panel shows all the field present in the template and when you select a field the Properties pane is displayed under the Navigation pane of the Control Panel. From the Properties pane, under Display Attributes, you can change or define the format for Number, Currency, and Date fields.

12. Click **Check-In.**

> **Tip**
>
> You can change the locale of a template in the check-in window.

13. Enter the following values in the fields:
    a. **Name**: Enter JLocale
    b. **Agreement Types**: Select Corporate
    c. **Category**: Select Category
    d. **Subcategory**: Select Subcategory
    e. **Language**: Select Japanese
14. Click **Check-In.**
15. Log into the Apttus Contract Management application.
16. Navigate to the Agreements tab, and click **New**.
17. Select Corporate from the Record Type of new record and click **Continue**.
18. Enter the following values in the fields:
    a. **Agreement Name**: Enter JAgreement
    b. **Agreement Start Date**: Select 5/20/2019
    c. **Account**: Acc
19. Click **Continue** and click **Save**.
20. Select JLocale as the template and click **Generate**.

21. Open the generated document in X-Author for Contracts 2.0. The locale settings in the document are inherited from the template.
22. Change the agreement start date to 2020年8月21日.
23. Insert a clause with smart fields. All the fields are updated based on the template locale
24. Navigate to Doc Fields and click **Validate**. All the fields are validated based on the template locale and template date format.
25. Change smart field values in the contract management application and click **Update from CLM**. The field values are updated in X-Author for Contracts 2.0 as per the template locale.
26. Change the agreement start date to 2020年8月22日.
27. Click **Preview Reconcile** or **Reconcile** to view the locale based changes in the agreement document.
28. Click **Check-In**.

Note

You can also use the above steps to create a clause template and generate the clause document.

Restricting Agreement Document Check-In and Check Out

You can restrict agreement document check-in and check out based on the Status Category and Status of the agreement. You can use the "Restrict Checkin of Documents" comply system property to restrict users from checking in and checking out agreement documents. By default, no value is available for the property, hence, no check-in restrictions will be applied. For information on the Restrict Checkin of Documents comply system property, see *Contract Management on Salesforce Administrator Guide*.

If you provide a Status Category as the property value, the check-in and check-out restrictions are applied to all the statuses belonging to that status category. If you provide a Status as the property value, the check-in and check-out restrictions are applied only to that status.

If an agreement Status Category or Status matches the property value and you check-out the document, all the options are disabled and you cannot check in the document. If an agreement Status Category or Status changes with the workflow and does not match the property value, the restrictions are removed and you can modify the agreement.

Use Case

Consider the Restrict Checkin of Documents has In Authoring (Status Category) as the property value. When you open a document with the Internal Review status, the restriction will be applied and you cannot modify the document. This is because the restriction was applied at the Status Category level and all the statuses of that Status Category are considered for restriction.

Working with Files

When you enable the "Enable File" comply system property in Contract Management, you can check in, check out, and work on the agreement documents of type - Files. For more information on the comply system properties, see *Contract Management on Salesforce Administrator Guide*.

Promoting Clauses to Playbook

You can promote a marked clause from an agreement to the playbook to make that clause a part of the Playbook's clause repository. When you mark a text as a clause in an agreement, the highlighted text acquires smartness and becomes a clause. However, a marked clause is only considered a clause for that agreement instance and when you regenerate the agreement, the marked clause is lost. If you want to reuse the same marked clause for that agreement record even after regenerating the document or want to make the marked clause available for other agreements and users, you can use **Promote Clause** to make it a part of the Playbook.

Prerequisite

You must have a marked clause either in the template or in an agreement document.

To promote a clause to the Playbook

1. Go to **Work tab > Promote Clauses**. If you cannot see Promote Clauses under the **Work** tab, click the more icon (⋮) and from the menu, select **Promote Clauses**.

2. From the list of marked clauses, select the clause you want to promote to the clause library and click **Promote Clause**.
   The Promote Clause form inherits field values from the marked clause.
3. You can change the following field values based on your requirement.

Field	Description
Clause Name	Enter a new name of the clause.
Category	Select a category for your clause. The values of the categories are defined by your admin and help in filtering the clauses.
Subcategory	Select a subcategory for your clause. Options in the list will change based on the category you selected.
Language	Choose the default clause language.
Description	Enter a new description or modify the existing description for the clause. Maximum of 255 characters (an error will be thrown if this limit is exceeded).
Guidance	Enter new guidance or modify existing guidance to help users determine the purpose of the clause.
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.

4. Click **Save**.

You have promoted the clause to the Playbook. You can open the Playbook and search the promoted clause to use it in any other document or template.

Comparing and Merging Agreement Documents

This feature allows to compare or merge any two versions of an agreement document. You can compare or merge different versions of an agreement document within the same agreement record. You can also compare or merge different versions of an agreement document within the same agreement record.

Compare: The comparison is done on the basis of Word's Legal Black lines compare functionality. Compare Legal Black Lines compares the documents and displays only what changed between the two documents. The documents being compared are not changed. This type of comparison is always displayed in a new third document, typically named

Compare Result. Microsoft Word displays a new, third document in which tracked changes in the baseline document are accepted and changes in the selected document are shown as tracked changes. The documents being compared are not changed. You can compare the different versions of an agreement document within the same agreement record. You can also compare different versions of an agreement document within the same agreement record generated using different templates.

Merge: Merging documents uses Word's Combine feature to merge selected documents. Merging documents can be advantageous if you have one version of the document that has been redlined, and a regenerated version in the latest format (dynamically inserted fields, new clauses, etc.). Original (pre-merged) documents do not get changed. Merging the documents displays a new third document, named Merge Result. At this point, you can accept and reject any of the redlined elements in the combined document and check-in the document as a new version.

Compare Vs Merge

When you compare two document versions, the revised document version is considered as a baseline for tracking changes. When you merge two document versions with changes to the same content, the edits of both the original and revised content is displayed.

To compare different versions of an agreement document

1. Open an agreement document.
2. Go to the **Work** tab and select **Compare**. If you cannot see **Compare** under the Work tab, click the more icon (⋮) and from the menu, select **Compare**.
3. To compare agreement versions from the same agreement record, select a version in '**Select a version to compare or merge from**' and then a different version from '**Select a version to compare or merge with**' and click **Compare.**
   A new document is downloaded in the *Insert Comments and Track Changes* mode. It contains the differences between the two versions, in which tracked changes in the baseline document are accepted and changes in the selected document are shown as tracked changes.
4. Open the document in X-Author for Contracts 2.0.
   The document is locked and you will be able to Preview Reconcile, Mark Clause, Mark Field, Update from CLM, Validate Fields, Update Fields, Update Clauses and Promote Clause.

5. Unprotect the document.
6. Right-click a comment and select **Accept Change** or **Reject Change** based on your requirement.
7. You can make the required changes and check in the document to create a new version of the agreement document.

To merge different versions of an agreement document

1. Open an agreement document.
2. Go to the **Work** tab and select **Compare**. If you cannot see **Compare** under the Work tab, click the more icon (⋮) and from the menu, select **Compare**.
3. To compare agreement versions from the same agreement record, select a version in '**Select a version to compare or merge from**' and then a different version from '**Select a version to compare or merge with**' and click **Merge.**
   A new document is downloaded in the *Insert Comments and Track Changes* mode. It contains the changes of the two versions, in which changes in both the documents are shown as tracked changes. If both versions have changes in the same smart field, the changes in the revised version are retained.
4. Open the document in X-Author for Contracts 2.0.
   The document is locked and you will be able to Preview Reconcile, Mark Clause, Mark Field, Update from CLM, Validate Fields, Update Fields, Update Clauses and Promote Clause.
5. Unprotect the document.
6. Right-click comment and select **Accept Change** or **Reject Change** based on your requirement.
7. You can make the required changes and check in the document to create a new version of the agreement document.

Sending an Agreement Document for Parallel Review

At any point in the negotiation process, prior to finalizing the document, you can send the 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.

The parallel review is an unordered workflow that allows you to send a document for review to multiple reviewers without having to wait for each reviewer to approve it. When a Contract Administrator initiates a parallel review, a review cycle is created in Contract Management. After completing the review, each reviewer can check in the reviewed document. The feedback from each reviewer is merged with the latest version of the document. The Contract Administrator can review the changes of all the reviewers and check in the final document. Contract Management allows you to track the review activity in the Document Version section in the Agreement Related list on the agreement.

Prerequisites

- You must enable the *Parallel Review* comply system property in Contract Management to view the **Send for Review and Check-in** button on the latest version of the agreement document.
- You must check out the latest version of the agreement document per template to send for review.
- When you click Send for Review and Check-in, you can view With Redlines, Without Redlines, and Final - to be signed Save Options according to the custom permissions available for your profile.

Custom Permission in Contract Management	Save option available in X-Author for Contracts 2.0
XA_CheckinAsFinal	Final - to be signed, Without Redlines, and With Redlines
XA_CheckInWithoutRedlines	Without Redlines and With Redlines
XA_CheckInWithRedlines	With Redlines

If all the custom permissions are disabled, you will see all the Save Options. For more information on how to configure custom permissions, see *Contract Management on Salesforce Administrator Guide*.

Restriction

You cannot send supporting and non-version aware documents for review.

To send an agreement document for review

1. Click **Finish** to open the Select Check In/Parallel Review page.
2. Click **Send for Review and Check-in** to view the Assign Reviewers page.
3. In the Search and add reviewers section, click User to view a dropdown menu.
4. Select User, Contact, or Email according to your requirement.
5. Enter the following reviewer details:

   Tip

   Type the first two letters of user name or contact in the text fields to view suggestions. If the desired contact name is not displayed in the first 20 search result then enter more characters of the Contact or enter the full name of the Contact name.

   a. If you select User, enter the name of a user in your Org. Click **Add**.
   b. If you select Contact, enter the name of a contact in your Org. Click **Add**.
   c. If you select Email address, enter the name and email address of the recipient. Click **Add**.

      Note

      You cannot add the same reviewer in User, Contact, or Email sections.

6. Click ✖ to remove any reviewer.
7. Click **Next**.
8. In the Notify via Email - Compose Message section, you can view or edit the Subject and Message of the review email.
9. Click **Next**.

   Note

   The Reviewer Access Selection page does not appear if there are no smart fields or clauses within the document or if the document has Insert Comments or Read-only protection mode.

10. In the Reviewer Access Selection (Fields) section, you can view the list of smart fields within the agreement document.
11. Click the smart field name to view the field in the agreement document.
12. Select or unselect the first checkbox to allow or prevent a reviewer from editing all the smart fields. You can also select or unselect specific smart fields to allow or prevent the editing of those smart fields.

13. Click **Next**.
14. In the Reviewer Access Selection (Clauses) section, you can view the list of smart clauses within the agreement document.
15. Click the smart clause name to view the clause in the agreement document.
16. Select or unselect the first checkbox to allow or prevent a reviewer from editing all the smart clauses. You can also select or unselect specific smart clauses to allow or prevent the editing of those smart clauses.
17. Click **Next**.
18. Select the required Save Options.
    The Reconcile checkbox is selected by default.
19. Click **Complete**. If there are changes to smart fields or clauses in the document:
    a. All the updated smart fields that are available for reconciliation are displayed. Review the **CLM Value** and **Current Value** of the updated smart fields in your document and click **Save & Next**.
    b. All the updated smart clauses that are available for reconciliation are displayed. Expand a clause from the list to review the **Original** and **Edited** content of the clause.
20. Click **Complete**.
    An email notification with an attached review document is sent to all the reviewers. The review cycle is initiated and the document is locked. You cannot use the same agreement document which is generated with the same template and cannot send the same document for review. You can initiate a new review cycle after the current review cycle is completed, ended, or canceled.

As a reviewer you can or cannot perform the following tasks:

- You cannot access the Work tab as it is disabled.
- You can edit smart clauses and smart fields in the document that are permitted by the contract administrator.
- You can check out and check in the review document.

> **Note**
>
> The parallel review is not applicable for Offline Agreements when they are created or checked-in for the first time. Once the offline agreement is checked-in, you can send for parallel review on the subsequent check-outs.

Checking In a Reviewed Document

A reviewer can check out, make necessary changes, and check in the reviewed document. When you check-out the review document, X-Author for Contracts 2.0 identifies the document as a part of the review process and allows checking in that document as a revised version. A reviewer can check in the reviewed document multiple times before the review cycle is completed. A reviewer cannot check in the reviewed document after the review cycle is completed. Each reviewer's document is checked in as a new review version. A minor version is created after regenerating the document by merging the reviewer changes with the previous version of the document. The Contract Administrator can check in a reviewed document on behalf of another review. The review cycle is completed when all the reviewers check-in their reviewed documents. After all the reviewers have completed the review, the Contract Administrator can review the document by accepting and rejecting changes and check-in the final document.

Tracking Document Review Status

You can track the status of the documents in the review that require your attention and response. When the parallel review is enabled for your org, you can view the reviewer details and the current review status of an agreement document.

Prerequisites

- You must enable the Parallel Review comply system property to view the Track Review Status button.
- The Track Review Status button is enabled when you have a document in review.

Restriction

You cannot track review status for non-version aware documents.

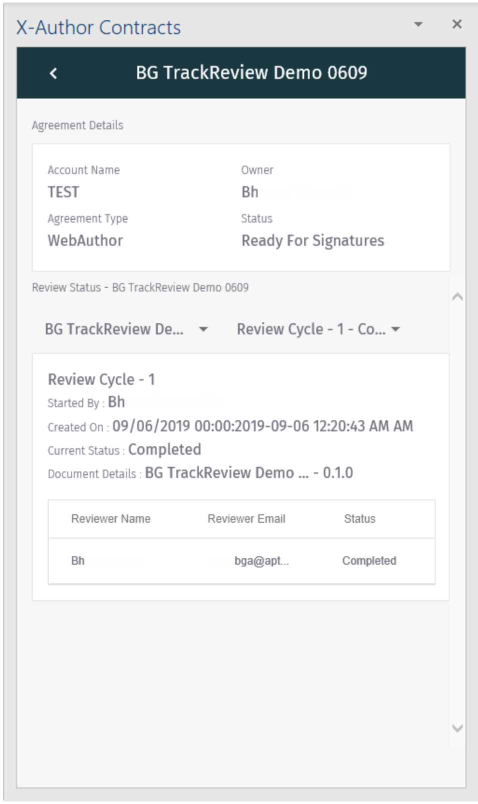
To track review status

1. In the **X-Author Contracts** pane, go to **Start tab** > **Search** > **Search Agreements**.
2. Enter the agreement name or number as the search term and click the **Search** icon ( ).

3. From the search results, click the **Expand** icon ( ) of the agreement you want to download. In the expanded description, click **Track Review Status**. This opens the Review Status page that lists all the review cycles and the review details.
4. Click the template name to view a template list that has at least one review cycle. The latest template is selected by default.

> **Note**
>
> For offline agreements, an agreement document name is displayed instead of the template name.

5. Click the review cycle name to view different review cycles for a particular template. The latest review cycle is selected by default.
   You can view the review cycle details—Started By, Created On, Current Status, Document Details, Version, Reviewer Name, Reviewer Email, and Status.



Deleting Smart Elements Using Delete or Backspace Key

You can now use the **Backspace** or **Delete** key from your keyboard to delete clauses, fields, smart clauses, smart fields and read-only fields from an agreement document. Clauses or fields deleted from the document are recorded in the reconciliation screen as deleted. This feature improves the usability experience of X-Author Contracts.

Earlier smart elements like smart fields or smart clauses could be deleted only by marking them for deletion from the control panel and then reconciling them. This feature removes that limitation. Also, if you are not an Apttus user and do not have X-Author installed, you would still be able to delete smart elements from the agreement document. Additionally, earlier it was difficult to remove static text if it was in between two smart elements. That problem is solved with this feature.

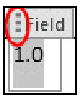
Prerequisites

- To delete a smart element you must ensure that the value of the Comply System Property, **UnlockSmartElements** is set to *True* in Contract Management. Only then the smart elements become available for deletion.
  For more information on how to configure the comply system property, refer to Contract Management on Salesforce Administrator Guide.

To delete a smart field, smart clause or repeat section

1. Select the smart element in the document. Highlight the text value of the field, clause, section or table with your mouse.
2. Press **Delete** or **Backspace**. This only deletes the field value but the content border remains.
3. Press **Delete** or **Backspace** again to completely delete the smart element. Now, the content border is also deleted.

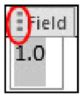
OR

1. Identify the smart element in the document.
2. Click the vertical ellipsis icon 

 on the content control border of the element.
3. Press **Delete** or **Backspace**.

The content control border of the fields, as well as the field value, will be deleted.

To delete a repeat-table

1. Identify the smart table in the document.
2. Click the vertical ellipsis icon 

 on the content control border of the table.
3. Press **Delete** or **Backspace**.

The cell values are deleted but the table remains with blank cells. When you delete a cell value within a table, the changes are shown as strikethrough in the reconcile smart fields in table screen. The new value column remains blank and the previous value is shown as strikethrough. However, this practice is not recommended because if you delete a cell in a repeat a table, you may see some issues during reconciliation.

To delete a read-only field

1. Select the read-only field in the document (Protection Mode= *Full Access)*.
2. Press **Delete** or **Backspace**.

OR

1. Select the read-only field in the document (Protection Mode= *Insert Comments and Track Changes)*.
2. Press **Delete** or **Backspace**.
3. You will see a Microsoft Word's warning message, click **Yes** to continue with the delete operation.
4. Go to Microsoft Word ribbon and click **Review** tab.
5. Click **Accept**, to accept the delete changes. The content control of the read only field is deleted but the text value remains.
6. Select the text value and again press **Delete** or **Backspace**.
7. Repeat steps 3 and 4. You have to **Accept** the delete changes twice.

Now the complete read only field is deleted.

Best Practices and X-Author Contracts Behavior When Deleting Smart Elements or Read Only Fields

Smart elements can be deleted using the Del or Backspace key but, while doing it you must adhere to the following recommended best practices to avoid errors.

- Existing documents would not support delete using Delete or Backspace key unless they are regenerated from Contract Management or checked out in X-Author Contracts.
- Apttus recommends not to delete fields or smart elements in the following scenarios:
  - If the fields are part of sections, X-Author Tables, Headers, or Footers.
  - If the smart elements are part of a section with a third level X-Author table.

When Document Protection is set to *Full Access*

- If you delete a field by selecting the field value text and pressing Delete or Backspace, hit Backspace or delete twice to remove the text and the content control border of the field. If you fail to do so, you'll see a validation error on reconciliation or while validating the fields using **Validate Fields**.

When Document Protection is set to *Insert Comments and Track Changes*

- In *Insert Comments and Track Changes* protection mode, it is mandatory for you to first **Accept** or **Reject** the changes in the document from the **Review** tab of Microsoft Word before you perform any action from X-Author Contracts. Failing to do so will give you validation errors or unexpected behavior in X-Author Contracts. X-Author Contracts actions include performing **Update from Salesforce**, Checking in the document, reconciling the document, **Preview Reconcile**, and **Validate Fields**.
- You must remove the document protection by manually entering the password before you can delete smart elements as well as read-only fields from your document.
- If you select a content control and partially delete the text, the partial text would remain as static text.
- When you delete a smart field in the document and then open the control field, the **Current Value** column of the **Control Panel** will show blank values for the deleted fields.
- When you delete a smart field that has multiple occurrences in the document, the smart field's occurrence index is not updated in the Control Panel unless you check-in the document. The index number helps identify which occurrence of the field you have deleted.

Updating Multiple Smart Fields in a Document

The updateSmartFieldsOnAgreementDocument API allows you to update multiple smart fields in a document with the latest values and creates a new check-in with the redlined version without manual intervention. For more information, see *Updating Smart Fields* topic in *Contract Management on Salesforce SOAP API Guide*.

Working with Templates

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

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. The following sections describe the features you can use in X-Author when working with agreement templates.

- Opening Templates
- Creating New Templates
- Cloning a Template
- Checking In Templates
- Clauses
- Fields
- Template Expression Builder
- Setting Segments in Templates
- Defining Template Locale

Opening Templates

Using X-Author, you can open an agreement template from the repository and make changes to static text and other content in the document. When you are finished, you can check in the template and modify properties as needed (for example, changing which agreement types it is associated with).

To open a template

1. Open Microsoft Word and launch the X-Author add-in.
2. Log in to X-Author Contracts, as described here.
3. From X-Author Contracts pane, click the left-hand menu icon and select **X-Author Templates**.
4. In the X-Author Templates pane, go to **Start tab > Search > Search Templates**.

5. Use the **Search** box to search for an agreement template by keyword. Click the filter icon to expose drop-down menus that can help you to refine your search according to Template Type, Category, Subcategory, Locale, and Language.
6. From the list of documents, click the down arrow to expand and view guidance for the template.
7. Click **Open** to download a copy of the template.
8. Check your Downloads folder for the file and open it in Word.
   Your template is opened.

You can modify the template as per your requirement and check-in your template.

Creating New Templates

To get started with creating a new Agreement or Clause template in X-Author for Contracts 2.0, you must first define the basic properties for your template.

To create a new template

1. Open an existing document or a blank document in Microsoft Word and log in to X-Author Contracts.
2. From X-Author Contracts pane, click the left-hand menu icon and select **X-Author Templates**.
3. In the X-Author Template pane, go to **Start** > **Create**.
4. In the Create New Template pane enter the following details:

Field Name	Description
Type	From the drop-down choose the type of template. You can choose from- *Template, Clause, and Supporting Document.*
Locale	Select the locale from the drop-down. You can configure custom locales in Contract Management. For more information, see *Adding Custom Locale topic* in *Contract Management on Salesforce Administrator Guide.*
Business Object	Choose the business object for your template from the drop-down. You can choose from- *clm_Agreement, cpq_Quote, bil_Invoice, and bil_CreditMemo.*

Field Name	Description
Enable Formatting	Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats.
Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.	
Date Format	Select an option from the drop-down to choose the default format for all date fields in the template.
Currency Format	Select an option from the drop-down to choose the format for all Currency fields in the template. Choose "None" to only display Currency field values in generated documents. If "Currency Symbol" is selected, Currency fields will be generated with no space between the symbol and field value. If "ISO" is selected, Currency fields will be generated with a space between the ISO code and the field value.
Number Precision	Enter a number from 0-9 to define the precision for Number/Percent field values in the template (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)
Currency Precision	Enter a number from 0-9 to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)

5. Click **Save** to confirm the template properties.

The Work Tab is enabled. You can now work with your template.

Cloning a Template

You can clone an existing template that you have opened to make a new copy of the template.

Prerequisite

You must have an existing template opened.

To clone a template from an existing template

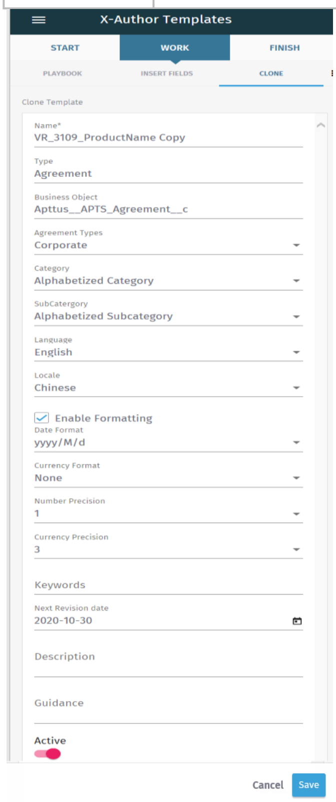
1. From the left navigation panel, select **X-Author Templates**.
2. In the X-Author Templates pane, go to the **Work** tab, click the more icon (⋮) and select **Clone**.
3. In the Clone Template page, change the name of the cloned template, to suit your requirements. By default, the cloned template name has 'Copy' added to the end of the original template name. For example, if you're cloning a template named *Clause Agreement Template* then the default name for the cloned template will be *Clause Agreement Template **Copy.***
   You have the option to change settings of your template when you clone it. You can specify the following fields:

Field	Description
Name*	Enter the name of the template.
Type	Choose the template type from the picklist (Agreement, Proposal, Clause, etc.).
Business Object	Choose the business object for your template (e.g., *Apttus__APTS_Agreement__c* for Agreement). This picklist is dependent on the value selected for Type.
Agreement Types	From the drop-down, you can select multiple Agreement types to associate with your template. The value of Agreement Types decides which templates are available at the time of agreement generation. If your Template's Agreement Type matches with the Agreement Type of your agreement record, you will see that template in the list of available templates at the time of document generation.
Category	Choose the category from the drop-down. The categories are defined by the administrator, in Contract Management.
Subcategory	The subcategory is a dependent field. The Subcategories are populated, based on the value chosen for Category. The subcategories are defined by the administrator, in Contract Management.
Language	Choose the default template language

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Locale</td><td>Choose an option from the list to change the default locale for the template. You can configure custom locales in Contract Management. For more information, see Adding Custom Locale topic in Contract Management on Salesforce Administrator Guide.</td></tr>
<tr><td>Enable Formatting</td><td>Check this box to enable locale formatting at the template and field level for this template. This allows you to define locale settings for Currency, Number, Percent and Date formats.</td></tr>
<tr><td colspan="2">Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Date Format</td><td>Select an option from the drop-down to choose the default format for all date fields in the template.</td></tr>
<tr><td>Currency Format</td><td>Select an option from the drop-down to choose the format for all Currency fields in the template. Choose "None" to only display Currency field values in generated documents.

If "Currency Symbol" is selected, Currency fields will be generated with no space between the symbol and field value. If "ISO" is selected, Currency fields will be generated with a space between the ISO code and the field value.</td></tr>
<tr><td>Number Precision</td><td>Enter a number from 0-9 to define the precision for Number/Percent field values in the template (e.g., "2" if the Number field should display two digits following the decimal point.)</td></tr>
<tr><td>Currency Precision</td><td>Enter a number from 0-9 to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)</td></tr>
</table></td></tr>
<tr><td>Keywords</td><td>Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.</td></tr>
</table>

Field	Description
Next Revision Date	Identify a date for the next revision of the template.
Description	Enter a new description or modify the existing description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded).
Guidance	Enter new guidance or modify existing guidance to help users determine the purpose of the template.
Active	Select the Active switch to 'On' to activate the template. You must activate a template to use it for generating an agreement document.



4. Click **Save** to save the cloned template in Contract Management.

Checking In Templates

A template is a blueprint using which an agreement is generated and clauses or supporting documents are created. Template outlines the content and the format of an agreement, clause, and supporting document. After you create a new template or make changes to an existing template, you can check-in the template to update its contents in Contract Management.

Prerequisite

You must have a template checked-out or created to check-in a template.

To check-in a template

1. In the X-Author Templates pane, click the **Finish** tab.
2. Under Check-in, enter the value of the following fields, (the fields marked with asterisk * are required)

Field	Description
Name*	Enter the name of the template.
Agreement Types	From the drop-down, you can select multiple Agreement types to associate with your template. The value of Agreement Types decides which templates are available at the time of agreement generation. If your Template's Agreement Type matches with the Agreement Type of your agreement record, you will see that template in the list of available templates at the time of document generation.
Category	Choose the category from the drop-down. The categories are defined by the administrator, in Contract Management.
Subcategory	The subcategory is a dependent field. The Subcategories are populated, based on the value chosen for Category. The subcategories are defined by the administrator, in Contract Management.
Language	Choose the default template language
Locale	Select the locale from the drop-down. You can configure custom locales in Contract Management. For more information, see *Adding Custom Locale topic* in *Contract Management on Salesforce Administrator Guide*.
Enable Formatting	Select this checkbox to enable locale formatting at the template level for this template.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td colspan="2">Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Date Format</td><td>Select an option from the drop-down to choose the default format for all date fields in the template.</td></tr>
<tr><td>Currency Format</td><td>Select an option from the drop-down to choose the format for all Currency fields in the template. Choose "None" to only display Currency field values in generated documents.

If "Currency Symbol" is selected, Currency fields will be generated with no space between the symbol and field value. If "ISO" is selected, Currency fields will be generated with a space between the ISO code and the field value.</td></tr>
<tr><td>Number Precision</td><td>Enter a number from 0-9 to define the precision for Number/Percent field values in the template (e.g., "2" if the Number/Percent field should display two digits following the decimal point.)</td></tr>
<tr><td>Currency Precision</td><td>Enter a number from 0-9 to define the precision for Currency field values in the template (e.g., "2" if the Currency field should display two digits following the decimal point.)</td></tr>
</table>
</td></tr>
<tr><td>Keywords*</td><td>Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.</td></tr>
<tr><td>Next Revision Date</td><td>Identify a date for the next revision of the template.</td></tr>
<tr><td>Description</td><td>Enter a new description or modify the existing description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded).</td></tr>
<tr><td>Guidance</td><td>Enter new guidance or modify existing guidance to help users determine the purpose of the template.</td></tr>
</table>

Field	Description
Activate	Select the Active switch to 'On' to activate the template. You must activate a template to use it for generating an agreement document.

3. Click **Check In**.
   A message is displayed that your template is checked in and the template is downloaded. You can open the template and continue working on the template. You can now use the Playbook to insert clauses.

Your template is checked in to Contract Management. A new template record is created for the template if this is the first check-in or modified if it already exists. A DOCX copy of the template is added in the Notes & Attachments related list in Contract Management.

Clauses

Clauses are modular blocks of text that are used frequently across multiple templates. You create clauses as described in Creating New Agreement Templates. After a clause is created, you can use Playbook to insert clauses into a template.

The following sections explain how you can use clauses in your agreement template:

- Using Playbook for Templates
- About Template Clauses Menu
- Making Clauses Smart in a Template
- Making Clauses Condition-based in a Template
- Marking Clauses in a Template
- Refreshing Clauses in a Template

Using Playbook for Templates

Playbook is a library of clauses, or clause templates, that each contain modular blocks of contractual language that can be reused across multiple agreement templates. Playbook helps you to search for clauses or supporting documents that can be inserted into the template as inline text.

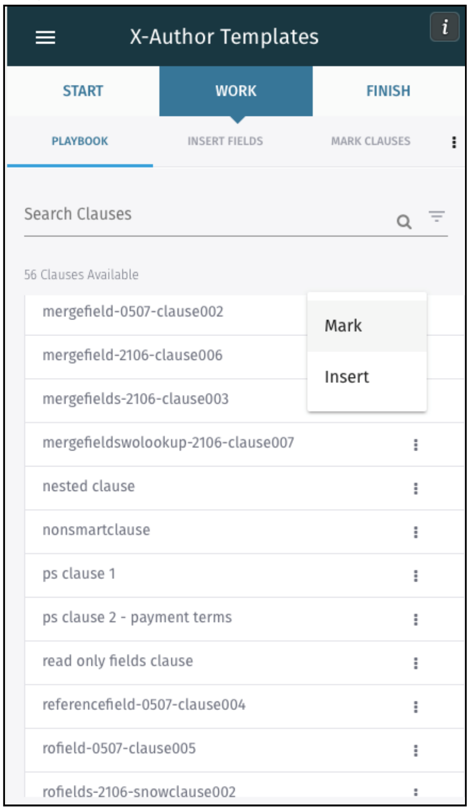
> ⓘ You cannot use the Playbook to insert clauses unless the template you are working with has already been checked in at least once. If you are in the process of creating a new template, check in the template and open it again to start using Playbook.

To insert a clause from Playbook into a template

1. In the X-Author Templates pane, go to **Work** > **Playbook** > **Search Clauses**.
2. In the Search Clauses field, click the search icon to list all the available clauses or enter a search string to search a specific clause.
3. You can also click clause filter icon to get filtering options. You can filter the clause based on clause Category, Subcategory, Locale, Language, and Type.

> **Note**
>
> You can configure custom locales in Contract Management. For more information, see *Adding Custom Locale topic* in *Contract Management on Salesforce Administrator Guide.*

4. In your template document, place the cursor at the point of insertion.



5. Click a clause from the list to view the clause text and guidance. Select the clause from the Playbook pane, click more icon next to the clause name and click **Insert** to insert the clause into your template as inline text.

You see a success message on successfully inserting a clause. The clause content is marked by a content control boundary in your template.

To delete a clause

Select the clause text in the template and press **Delete** on your keyboard. The selected clause text would be deleted from the template.

About Template Clauses Menu

The **Template Clauses** menu lists all the clauses (inserted and marked) and fields present in the currently opened template. The fields contained within a clause are shown hierarchically. From this menu you can take following actions on a clause or a field:

- Navigate to a clause in the template
- Mark a clause as smart
- Make a clause condition-based in the template

To view a clause

1. Go to **Work > Template Clauses** tab.
2. Click on a clause name in the list. The document scrolls to highlight the selected clause in the template.

A newly marked clause is also displayed in the Template Clauses list.

Making Clauses Smart in a Template

You can use X-Author for Contracts 2.0 to make a clause in your template smart. A standard contracting process begins with a generated document, and ends with a final agreement. In between the initial document and the final signed agreement, the document gets redlined and negotiated. Smart clauses help track the differences between different versions of the agreement document.

Smart clauses, like smart fields are parts of a contract that can be reconciled between versions of an agreement and noted in the agreement record. This can be used during negotiations when clauses are redlined. Clauses that have been changed will be reconciled when you choose the reconciliation option at Check-In. Clauses can only be smart in the context of a generated contract document.

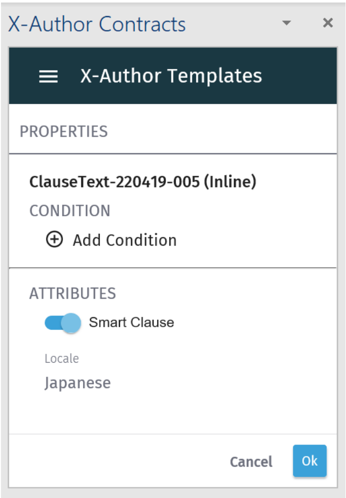
In the process of negotiations, a contract may get redlined multiple times. During these redlines, a user may choose to accept the changes made to the contract. Smart Clauses provide visibility into the changes made in the contract document by allowing the user to view the changed clauses in at Check-in and when the clause change has been checked in, on the Agreement Clauses related list.

When you use a template which has smartness attribute enabled for its clauses, the generated agreement document will have smart clauses that can be tracked.

> **A Note on Agreement Documents and Templates**
>
> All generated agreement documents (as opposed to imported offline agreements) use document templates saved in Apttus Contract Management. These templates contain merge fields which, upon generation, pull Apttus field values from the agreement to create distributable documents.

To make a clause smart in a template

1. Open the template in X-Author Contracts.
2. Log in to X-Author Contracts and from the left-hand navigation select X-Author Templates.
3. In the X-Author Templates pane, go to **Work >Template Clauses**.
4. The Template Clauses pane lists all the clauses present in your template. Select a clause from the list and click the gear icon next to the clause name.



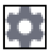
5. In the **Properties** pane, slide the switch to turn on the **Smart Clause** attribute and click **Ok**.

Your template clause will now have smartness property. To remove the smartness property of a clause, you can slide the **Smart Clause** attribute switch to off position (greyed out).

Making Clauses Condition-based in a Template

You can use condition-based clauses in your template to make more customized and flexible agreement templates. The condition for the condition-based clauses can be simple or complex expressions that you can make using the expression builder. The clause conditions are evaluated at the time of agreement generation and the clause text is included in the generated document only if the associated condition resolves to *True*.

To add a condition to a clause

1. Open the template in X-Author Contracts.
2. Log in to X-Author Contracts and from the left-hand navigation select X-Author Templates.
3. In the X-Author Templates pane, go to **Work** > **Template Clauses**.
4. The Template Clauses pane lists all the clauses present in your template. Select a clause from the list and click the gear icon  next to the clause name.
5. In the **Properties** pane, click **Add Condition** to open the template expression builder.
6. Create your condition expression in the **Make Conditional** page and click **Add**. For more information on how to create simple and complex condition expressions, refer to the Expression Builder section.
7. Click **Ok** to save the condition. The properties page now shows the condition that you created.

Your clause is made conditional and you will see a success message.

Marking Clauses in a Template

You can use the mark Clause menu to apply clause boundary and smartness property to a block of text. On generating a document, only the clauses marked as smart have the clause boundaries.

While constructing a template, you may have a block of text that you may not want in the playbook, but in the context of an agreement template (and later a contract), you would like to add the smartness property. Using **Mark Clauses** feature, you can add smartness property to an inline text in the agreement template. Any clause formed from the **Mark Clauses** feature will, by default, have **Smart Clause** property turned on.

While marking a clause, you have to keep in mind the following points:

- Apttus recommends to only mark clauses which are not inserted from the Playbook. In other words, you cannot mark a clause as smart inside an existing clause record.

- After you mark a block of text as a clause, you cannot mark any other clause within the boundary of the marked clause.

To mark a clause in a template

1. Log in to X-Author Contracts and select X-Author Templates from the left-hand navigation.
2. Go to **Start** tab in the X-Author Templates pane and search and open a template.
3. Highlight the content (inline text) of the template that you want to mark as a clause.
4. After highlighting the content, go to **Work Tab> Mark Clauses**. If you cannot see the **Mark Clauses** option in the **Work** tab, click the more option and select **Mark Clauses**.
5. In the Mark Clause form, specify the following details for marking a clause,

Field	Description
Clause Name	Enter a new name of the clause.
Category	Select a category for your clause. The values of the categories are defined by your admin and help in filtering the clauses.
Subcategory	Select a subcategory for your clause. Options in the list will change based on the category you selected.
Exception	Select a term exception record from the drop-down list to associate with your clause.
Risk Rating	Select an appropriate risk rating for your clause. Valid values are: • *Green* • *Red* • *Yellow*
Materially Significant	Select this check box if you want to make your clause materially significant.

6. Click **Save**.

Your clause is successfully marked and acquires content control border. After marking the clause you can go to **Work > Template Clauses**, to confirm that the marked clause is recognized in the document.

Refreshing Clauses in a Template

Refresh Clauses functionality allows you to keep your agreement template up to date. If the agreement contains clauses, and one clause has been changed but not published, this functionality can update the clause in the agreement template in context. The clauses having any of the following changes will appear in the Refresh Clauses list:

- Change in clause attribute
- Addition, deletion, or modification in clause content
- Change in the smart, read-only or merge fields

Prerequisite

Ensure that you have checked in the clause after editing it.

Restrictions

Clauses with repeat table or repeat section cannot be refreshed.

To refresh clauses in a template

1. In the X-Author Templates ribbon, click **Refresh Clauses**.
   If the Template contains clauses with no changes, you will see a message stating, *All clauses are up-to-date.*
   If the Template contains clauses with changes, you will receive a message showing which clauses need to be refreshed.
2. Click **Refresh** to update all of the clauses that are within your main Template. This displays the confirmation stating *All clauses are refreshed successfully.*

Fields

Fields that you insert in your template, or "merge fields" as they are sometimes called, represent the contractual terms and metadata from your Agreement record in Apttus Contract Management. When you generate a contract document, the values of the fields are retrieved from the agreement record and populated in the document. As a template administrator, you are responsible for building your template to include fields, as static text, as read-only fields or as smart fields that can be changed and reconciled to the Agreement record during the negotiation process.

Following sections explain how you can use fields in your agreement template:

- Inserting Fields in a Template
- Making Fields Read Only in a Template
- Making Fields Smart in a Template
- Inserting Fields in a Template as a Table
- Inserting Fields in a Template as a Section

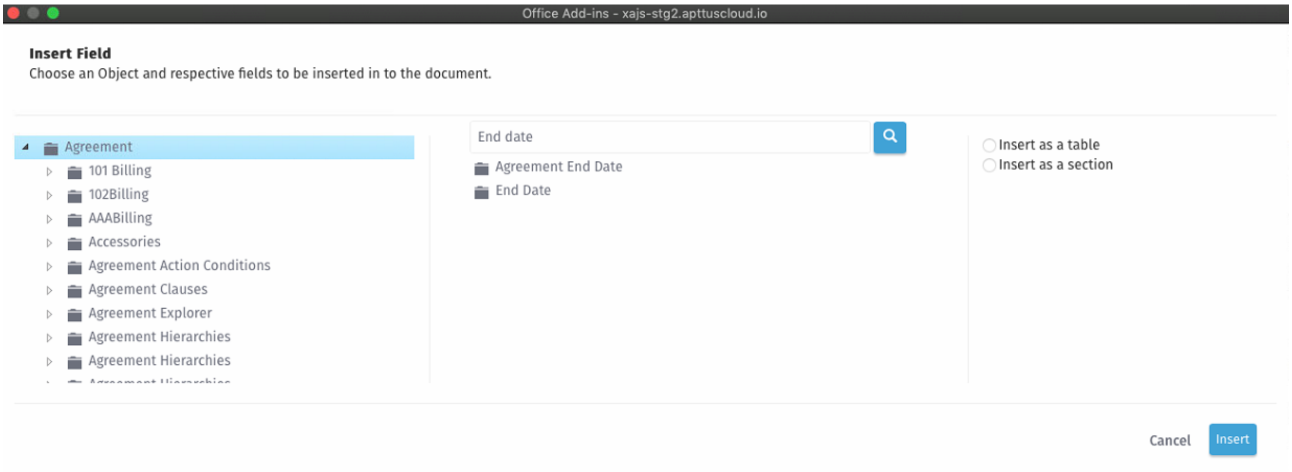
Inserting Fields in a Template

You can navigate to the Work tab to insert fields in a template.

To insert fields in a template

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to the **Work** tab> **Insert Fields**.
4. Place the cursor in the section of the template text where you want to insert a field and click **Insert New Fields**.
5. On the Insert Field popup select the field's Object context (i.e., "Agreement") from the left column.
6. To search an object-qualified field in the right column, enter a keyword and click the search icon ( ) or press enter.
7. Select the required field and click **Insert**.

> **Tip**
>
> To select multiple fields, hold Ctrl (keyboard key) and select the fields.



The fields are inserted in the template. To view the inserted fields, click **Template Fields** under the Work tab. Template Fields page shows the list of all the fields present in your current template. Select a field from the list to highlight it in the template document.

Making Fields Read Only in a Template

The Read Only fields are the fields with content control border and their values can be updated after document generation only using **Update from CLM**. These fields are different from smart fields and merge fields in that they are not inline like merge fields and their values cannot be edited like smart fields.

If you have generated an agreement document using a template containing the read-only fields and later want to update the values of the field without generating or regenerating another document, you can click Update from CLM and the values of the read-only fields will be updated from the Contract Management agreement record. This is useful when you need to use the same agreement as a baseline document for creating another agreement with the same content but for a different agreement record. All the fields which are not marked as smart but need to be updated with the values from the new agreement record can be made read-only fields.

Read Only fields have the following characteristics:

- Any field can be made a read-only field or smart field but not both.
- Read-only fields can only be defined in a template.
- The value of the read-only fields cannot be edited in the generated agreement document and can only be updated.
- Read Only fields show a content control boundary in the generated agreement documents.
- Fields in clauses, repeat table, and repeat section can also be marked as Readonly.

To mark a field read-only

1. Insert the field into your template by following the steps in Inserting Fields into a Template.
2. From the X-Author Templates pane, go to **Work tab** > **Template Fields**. If you cannot see the Template Fields tab, click more icon ( ) and select **Template Fields**.
3. The Template Fields page shows the list of all the fields present in your template. Search for and click the field name in the list to highlight it in the document.
4. Click the gear icon adjacent to the selected field name to open the Properties page.
5. In the attributes list, turn on the **ReadonlyField** switch and click **Ok**.
   Your field is marked as read-only.

Making Fields Smart in a Template

Smart fields are specialized fields that can retain the Apttus field definition even after the Merge Service generates the Agreement document. This feature helps for reconciling the document which is explained in detail in the Reconciliation section. Smart fields are intended for parts of an agreement that would normally be negotiated. Smart fields are usually represented by small chunks of text, such as dates, categories, and numeric values. Smart fields are not intended to hold large amounts of text–if necessary, use smart clauses instead.

> Smart fields have the following limitations:
> - Text Area data type fields and formula field for LongDate are not supported.
> - You cannot mark Lookup fields as smart.
> - Smart fields cannot be used in the headers or footers of agreement documents.

To mark a field as Smart

1. Insert the field into your template by following the steps in Inserting Fields in a Template.
2. From the X-Author Templates pane, go to **Work tab** > **Template Fields**. If you cannot see the Template Fields tab, click more icon and select **Template Fields**.

3. The Template Fields page shows the list of all the fields present in your template. Search for and click the field name in the list to highlight it in the document.
4. Click the gear icon adjacent to the selected field name to open the **Properties** page.
5. In the attributes list turn on the **Smart Field** switch and click **Ok**.

Your field will be Smart.

> If you want to turn off the smartness property of a field, turn off the Smart Field switch, under Properties.

Inserting Fields in a Template as a Table

You can insert fields as a table in your template and the inserted table is added as a repeat table. When template with repeat table is used to generate an agreement, the repeat table of a header row with inserted fields and their values in the preceding rows.

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to the **Work** tab.
4. Place the cursor in the section of the template text, where you want to insert a field and click **Insert New Fields**.
   This displays the Insert Fields window.
5. From the left column select a line item object, such as **Agreement Line Items**.
6. In the window to the right, hold **command** and select one or more fields from the list. Each field you select is displayed in a column in the table.

   > Fields are inserted as columns in the table based on the order you select. Do not move your cursor when the fields are being inserted.

7. Select the checkbox **Insert as a table.**
8. Click **Submit**. A Repeat table is inserted into your template with each field displayed as a separate column.
9. To search inserted fields:
   a. Navigate to the **Template Fields** tab. This displays the Repeat Table (object name) and the fields in the repeat table.
   b. Enter the field name in the search field and click the search icon ( ).
10. To make an inserted field smart field or readonly:
    a. Click the gear icon () adjacent to the selected field name to open the **Properties** page.

   b. In the attributes list, turn on the **Smart Field** or **Readonly** switch based on your requirement and click **Ok**.
11. To show or hide captions for a generated table:
   a. Click the gear icon (⚙) adjacent to the Repeat Table.
   b. In the Table Attributes section, turn on the **Show Caption** switch.
12. To select table formatting when no data is present:
   a. Under the Table Display Attributes, click **Format**. This displays a drop-down menu. Select one of the following options based on your requirement.
      i. To show table captions and one empty row, select **Show captions and one empty row**.
      ii. To show captions only and no rows, select **Show captions only**.
      iii. To remove the entire table from the generated document, select **Remove whole table**.
   b. Click **Ok**.

> ⚠ Fields inserted in a table cannot be made conditional.

Inserting Fields in a Template as a Section

You can insert fields as a section in your template and the inserted section will be added as a repeating section. This inserts each specified field on a new line when you select multiple fields (in the selected order).

1. Open a template in X-Author Contracts.
2. From the left navigation pane, select **X-Author Templates**.
3. Go to the **Work** tab.
4. Place the cursor in the section of the template text, where you want to insert a field and click **Insert New Fields**.
   This displays the Insert Fields window.
5. From the left column, select a line item object, such as **Agreement Line Items**.
6. In the window to the right, hold **command** and select one or more fields from the list.

   > ⚠ Fields are inserted one below the other based on the order you select. Do not move your cursor when the fields are being inserted.

7. Select the checkbox **Insert as a Section**.
8. Click **Submit**. A repeat section is inserted into your template with each field displayed one below the other.
9. To search inserted fields:

a. Navigate to the **Template Fields** tab. This displays the Repeat Section (object name) and the fields in the repeat section.

b. Enter the field name in the search field and click the search icon ( ).

10. To make an inserted field smart field or readonly:

    a. Click the gear icon ( ) adjacent to the selected field name to open the **Properties** page.

    b. In the attributes list, turn on the **Smart Field** or **Readonly** switch based on your requirement and click **Ok**.

11. To make inserted fields conditional, see Template Expression Builder.

Template Expression Builder

You can use a template expression builder to conditionally display content in your generated agreement document. You can write a conditional expression using the expression builder; this expression is evaluated to include or exclude the conditional content. The expression builder can be used with clauses, sections, or segments for their conditional rendering.

The expression builder has three main components or fields,

- **Fields** are object fields. **Fields** lists all the available fields of the selected business object. It is a drop-down list which shows the field names listed according to their hierarchy. Each expression condition requires the identification of the field control to which the condition will apply.
- **Operator** lists the logical operators for carrying out the logical operation.
- **Value** is the value of the object field selected earlier. The value finishes the expression and is used to determine whether the condition evaluates to *True* or *False*.

Adding Filter Logic

The Expression Builder allows you to **Add Row** to add more expression conditions, where two or more conditions are joined in the overall expression by the **Filter Logic**. In the absence of a filter logic, the default relationship between the rows is the Boolean operator AND.

You can add up to nine rows of condition expressions which can be used in a single expression using the filter logic. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have five rows you can create a filter logic like, (((1 AND 3) OR (2 AND 4)) AND 5). To add filter logic click **Add Filter Logic** and enter your logic in the field. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you'll see message in red.

Click **Add** to finalize your conditional expression.

Setting Segments in Templates

Set Segment feature allows you to set condition and style for the highlighted text in your agreement template. The condition for the segment's visibility can be set from the expression builder. The segment can consist of highlighted text, a clause, a group of text across clauses, or text with fields. You can leverage this feature to create a template that can show or hide different segments of text in the generated agreement based on the conditions set by you. The expression builder is fully integrated with the objects and fields in your Salesforce Org.

To make a Segment Conditional in a template

1. In the X-Author Templates pane, go to **Work** tab, click the more options icon ( ) and select **Set Segment**.
2. Highlight a block of text in your template and click **Set Conditional**. This opens the **Make Conditional** window which has the expression builder.
3. In the make **Make Conditional** window, you can create a conditional expression and also create a complex expression using logical operators between multiple rows of conditions. To create an expression you must enter the values of the following three fields:

Field Name	Description
Field	Select the field which you want to set as the criteria for the condition. The **Field** drop-down shows the Agreement object and its fields from your Salesforce org. You must select a field name. The fields are listed and grouped according to their hierarchy.
Operator	You must select the logical operator from the drop-down. This forms the relationship between the **Field** and its **Value**.
Value	Enter the value of the field name selected in the **Field.**

You can add multiple rows of conditions. To do this click Add Row and set your condition. Click **Add Filter Logic** to add a logical relation between multiple rows.

4. Click **Add**.
   You will see the success message and your segment will be added as Segment Conditional (Conditional) to the segments list in the **Set Segment** pane. Selecting the segment name from the list highlights that segment in the template document.
5. To view or edit a segment condition, select the Segment Conditional (Conditional) from the segments list in the **Set Segments** pane and click the gear icon ( ) next to the segment name. This opens the **Segment Conditional** page and you can see the condition expression set for that segment. To edit the conditional, click the pencil icon ( ) next to **Condition**.
   At the time of agreement generation, if your conditional's value evaluates to true, the associated segment is shown in the agreement document.

To delete a conditional segment in a template

1. Go to the **Work tab** > **Set Segment** tab in X-Author Templates.
2. Select the segment from the segment list. The selected segment is highlighted in the template.
3. Click the gear icon ( ) next to the segment name to open the **Segment Conditional** page.
4. Click **Delete**. You will see a confirmation message. Click **Delete** again.

Your segment is successfully deleted and the content control boundary of your segment is removed.

To set a style for a segment in a template

1. In the X-Author Templates pane, go to the **Work** tab, click the more options icon (⋮) and select **Set Segment**.
2. Highlight a block of text in your template and click **Set Style**. This opens the **Select Styles** window that lists custom styles.
3. Select a custom style or select the **Show built-in styles** checkbox and select a style.
4. Click **Select**.
   The segment is added as Segment Regular to the segments list in the **Set Segment** pane. Selecting the segment name from the list highlights that segment in the template document.
5. To view or edit a segment style:
   a. Select **Segment Regular** from the segments list in the **Set Segments** pane and click the gear icon ( ) next to the segment name.
      This opens the **Segment Regular** page with the segment style set for that segment.
   b. To edit the style, click the pencil icon ( ) next to **Style**.
6. To add a segment condition, click **Add Condition**. This opens the **Make Conditional** window which has the expression builder. For more information, see To make a Segment Conditional in a template.
   Segment Regular style segment changes to Segment Conditional after you add a condition.
   When you generate a document using a template with style segments, you can view different styles applied in the generated document.

To delete a style for a segment in a template

1. Go to the **Work tab** > **Set Segment** tab in X-Author Templates.
2. Select the segment from the segment list. The selected segment is highlighted in the template.
3. Click the gear icon ( ) next to Segment Regular to open the **Segment Regular** page.
4. Click **Delete**. You will see a confirmation message. Click **Delete** again.

Your segment is successfully deleted and the content control boundary of your segment is removed.

Defining Template Locale

You can define locale settings at the agreement template or clause level and field level.

- At the template or clause level:
    - You can specify the **Locale** and choose the Currency Format, Date Format, and configure Number and Currency Precision for the whole template when you create or clone a template or clause.

    > **Note**
    >
    > For date fields, the date formats are displayed based on the selected Locale.

    - You can also change the locale of a template or clause at check-in.
- At the template or clause field level:
    - You can use the Template Fields tab to define locale for **Number**, **Currency**, **Date**, and **Precision** fields.
    - You can also use the Template Fields tab to define Currency Format, Date Format, Currency Precision, and Number Precision for fields.
- The template or clause field level locale settings take precedence over template or clause level locale settings in the generated document.

To learn how to change field format by locale, refer to Changing Field Format by Locale.

Prerequisites

- *Enable Formatting* must be checked when creating, checking in or cloning a template to enable field-level locale configuration.

Supported Locale

English (US), English (UK), English (Canada), English (Ireland), Italian, German, Chinese, Japanese, Korean, Thai, Norwegian, Swedish, Russian, Portuguese, Polish, Greek (Greece), and Spanish are the standard locales that are available in Contract Management. You can configure custom locales in Contract Management. For more information, see *Adding Custom Locale* topic in *Contract Management on Salesforce Administrator Guide*.

Note

If a locale is deleted in Contract Management that is being used in a template at the template level and you check out and check in the template, the deleted locale is replaced with the first value of the Locale dropdown. If a locale is deleted in Contract Management that is being used in a template at the field level and you navigate to the Template Fields and view the field details, the Locale field is set to blank. If all the locales are deleted in Contract Management and you click Create, a warning message is displayed and you need to add required locales.

Unsupported Locale

Alsatian (Switzerland), Romansh (Switzerland), French (Switzerland), Walser (Switzerland), English (Republic of the Philippines), Filipino (Philippines) locales are not supported. German Mark and Swiss Franc currencies are not supported.

Locale Settings for Templates

You can define locale settings while:

- Creating a new template
- Checking in a template
- Cloning a template

Changing Field Format by Locale

When you create a new template or clone an existing one, you are required to specify a Locale for your template.

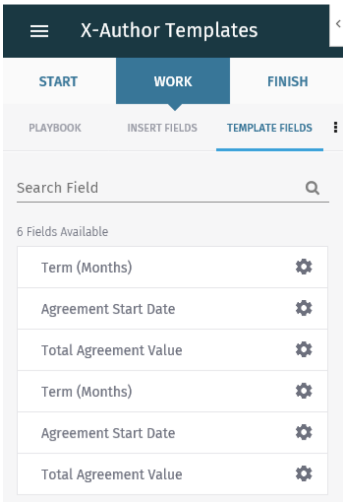
Because there may be some cases that require you to override formats at the field level, X-Author Templates provides template administrators with the ability to define Number and Currency Precision, Currency Format, and Date Format. This allows you to preserve locale for fields in inserted clauses at the template level while making specific changes to other field formats as needed. Generated documents conform to template locale except when specified at the field level.

Prerequisite

Enable Formatting must be selected when the template is created, cloned or checked in.

To change the field-level locale, precision, and format for date and currency fields

1. From the left navigation panel, select **X-Author Templates**.
2. In the X-Author Templates pane, go to the **Work** tab > **Template Fields**.



3. Click the gear icon ( ) beside the field name.
4. In the Properties page, based on the template field selected, you can view and change the following field properties:
    a. For date fields, you can change Locale and Date Format from their respective dropdown.
    The Date Formats displayed are based on the Locale selected.
    b. For the currency fields, you can change the Currency Format, Currency Precision, and Locale from their respective dropdown.
    Based on the locale selected, the default currency precision value provided in Contract Management is displayed. You can change the Currency Precision value as per your requirement.
    c. For the number fields, you can change the Locale and Number Precision from their respective dropdown.
    Based on the locale selected, the default number precision value provided in Contract Management is displayed. You can change the Number Precision value as per your requirement.

Apttus Copyright Disclaimer

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

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

DOC ID: XAJSSFSPR20UGREVA20200508