



X-Author for Contracts



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Manage and streamline the entire contract process right within Microsoft Word using X-Author for Contracts add-in.

Release Notes

Review the latest X-Author for Contracts release notes that describe the system requirements and supported platforms, new features, enhancements, resolved issues, and known issues.


- [Winter20.01.15 Release Notes](#)
- [Winter20.11.13 Release Notes](#)

Winter20.01.15 Release Notes

Release Notes contain the following information about X-Author for Contracts Winter20.01.15 Release.

For more information on new features, enhancements, and document improvements refer to [What's New](#) in *X-Author for Contracts Winter '20 User Guide*.

- **Packages:** Lists packages that are required to upgrade to this release of the product
- **System Requirements and Supported Platforms:** Lists requirements and recommendations for installing this release
- **New Features:** Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- **Enhancements:** Provides high-level descriptions of enhancements to existing features
- **Resolved Issues:** Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- **Known Issues:** Lists known issues that are applicable in this release


 This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

Packages

The following X-Author for Contracts package is automatically upgraded to the latest release without any intervention. Conga Contract Lifecycle Management (dependent package) is required to be upgraded to this release. These are the minimum required versions; later versions are also supported. Separate prerequisites for each feature can be

found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version <i>Version Name / Version Number</i>
X-Author for Contracts	2003 (Winter20.01.15 Patch)
Conga Contract Lifecycle Management	11.2.0582 11.582
Conga CLM (Contracts for Salesforce)	2.37

 Before installing or upgrading managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Managed Packages Dependency Matrix](#).

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using X-Author for Contracts on the Windows operating system.

System Requirement	Minimum Supported Version
Windows Operating System	Windows 10
Microsoft Office	Office 365 versions up to 16.0.11629 version

The following table lists the minimum requirements for installing and using X-Author for Contracts on the Mac operating system.

System Requirement	Minimum Supported Version
Mac Operating System	macOS Mojave (version 10.14.5)
Microsoft Office	Microsoft Office version 16.34 or higher

i New features and technologies are continuously deployed in new releases by X-Author for Contracts and they are supported by Conga where the associated Microsoft Office versions are also still supported by Microsoft. As Microsoft ends its own support for any Office version, subsequent new Conga release will no longer be developed, tested, or committed to support the application, on that version.

New Features

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

Enhancements

The following enhancement is new to X-Author for Contracts in this release.

Renamed Intelligent Import

In this release, Intelligent Import is renamed Intelligent Discovery.

Get Started

For details on the intelligent discovery, refer to [Intelligent Discovery](#) in *X-Author for Contracts Winter' 20 User Guide*.

Ability to Dynamically Display Hide or Show Smart Boundary Menu

Now, you can control the visibility of the **Hide Smart Boundary** and **Show Smart Boundary** menu options in X-Author for Contracts using the **Hide Content Control Border** custom setting in Conga CLM.

Get Started

For details on the hide or show smart boundary, refer to [Hiding or Showing Smart Boundaries](#) in *X-Author for Contracts Winter' 20 User Guide*.

Resolved Issues

There are no resolved issues in this release.

Known Issues

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

Conga Internal ID	Description
XAJS-4601	When a user compares two agreement documents containing date fields, the read-only date fields are removed and smart date fields are displayed as deleted in the document.
XAJS-4583	When you mark a smart field for removal and check in the agreement document with the Reconcile option, the smart boundaries and strikethrough are retained in the document.
XAJS-4581	When you generate an agreement document using a contract template that contains multiple fields, repeat tables, and repeat sections, clauses with multiple sub clauses, and clause bundles with multiple clause configurations, you do not redirect to the agreement detail page after successful agreement generation. The user observes this behavior when working with X-Author for Contracts for Conga CLM (Contracts for Salesforce).
XAJS-4531	When you set a style for a segment that contains clauses or clause bundles, the selected style does not apply to the clauses or clause bundles in the agreement document. The user observes this behavior when working with X-Author for Contracts for Conga CLM (Contracts for Salesforce).
XAJS-4241	When you insert a clause as smart in an agreement document and check in the document with the Reconcile option, Inserted and Modified clause actions are added in the Agreement Clause related list.
XAJS-3483	When you insert a clause in a template that contains a Microsoft Word table with style segment, the check-in of template takes more than 90 seconds.
XAJS-2543	On clicking Highlight option, the smart and read-only fields are highlighted thrice. This happens when you apply Insert Comments and Track Changes protection while generating a document.

Conga Internal ID	Description
Xajs-2365	<p>The formatting of the bulleted list is not proper when you perform the following actions:</p> <ul style="list-style-type: none"> • Make a segment that contains a bulleted list conditional in a template. • Mark clause to a block of text that contains a bulleted list in the template or agreement document. • Insert a clause that contains a bulleted list in the template or agreement document.
Xajs-3386	<p>On performing Update from CLM and Preview Reconcile, the Contract date format in Croatian is converted to an invalid date.</p>
Xajs-3301	<p>When you generate an agreement using a non-localized template, a currency prefix symbol is added to the currency data type field.</p> <p>Workaround: Set APTS_DoNotPrefixCurrency admin entry to true while generating agreement documents.</p>
Xajs-3054	<p>After inserting a smart clause in an agreement, the Conditional Segment within the clause does not appear as per the condition set for the clause.</p>
Xajs-3022	<p>Incorrect values are displayed for smart fields after regenerating an agreement with a different template.</p>
Xajs-2941	<p>The Compare pane stops responding on changing the value of a smart field in the Current document and comparing it.</p>
Xajs-2899	<p>After creating a section and a third-level table and navigating to Update From CLM screen, the values of smart fields appear as changed even if there were no changes made to smart fields.</p>
Xajs-2885	<p>The currency format for the reference lookup currency field is not displaying as per the record-level currency.</p>
Xajs-2975	<p>On validating doc fields after deleting smart and merge fields, an error is displayed.</p>

Conga Internal ID	Description
Xajs-2950	When you merge two versions of an agreement document generated with two different templates, you can view only revised version changes in the merged document.
Xajs-2730	<p>The following culture-specific date formats are not supported:</p> <p>Thai</p> <ul style="list-style-type: none"> • ddd d MMMM yyyy (For example, ศ. 20 มกราคม 2560 is displayed for 20/1/2560). • 'วัน'dddd'ที่' d MMMM gg yyyy (For example, วันศุกร์ที่ 20 มกราคม พ.ศ. 2560 is displayed for 20/1/2560). • Thai dates use Buddhist year which is 543 years ahead. Hence, 2017 is displayed as 2560. <p>Greek</p> <ul style="list-style-type: none"> • el-gr ---- MMMM yyyy (For example, Μάιος 2017 is displayed for May 2017).
Xajs-2964	On clicking Reject changes, smart fields are appended with current values instead of replacing the value.
Xajs-2931	When an Agreement Status Category or Status is restricted for check-in and check out, the restriction message does not appear for an offline agreement document. The offline document checks in successfully.
Xajs-2516	Inserting a nested clause disorganizes the clauses on the Doc Clauses tab.
Xajs-2700	A few built-in style segments do not apply in the generated document.
Xajs-2769	The Select Styles window is not displaying custom styles.
Xajs-2638	The loading time of the Preview Reconciliation window is more than 30 seconds on updating the content.
Xajs-2640	Using the Hide Smart Boundary option displays the smart boundary on pressing Command+Z.


Conga Internal ID	Description
XAJS-2703	If an agreement document has any read-only lookup fields in the repeat table under repeat section, the XAJS pane stops responding on using the Update from CLM option.
XAJS-2556	Updating a clause for the second time is not appearing in the Refresh Clauses tab.

Winter20.11.13 Release Notes

Release Notes contain the following information about X-Author for Contracts Winter20.11.13 Release.

For more information on new features, enhancements, and document improvements refer to [What's New](#) in *X-Author for Contracts Winter '20 User Guide*.

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Packages

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New Features

There are no new features in this release.

Enhancements

The following enhancement is new to X-Author for Contracts in this release.

Duration Optimization for Success and Informal Message

With this release, the duration to display an application success and informal message notification is reduced from 5 seconds to 2 seconds. The message automatically disappears after 2 seconds. To hide the message, you can manually click on it.

Resolved Issues

There are no resolved issues in this release.

Known Issues

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

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Conga Internal ID	Description
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Xajs-4531	When you set a style for a segment that contains clauses or clause bundles, the selected style does not apply to the clauses or clause bundles in the agreement document. The user observes this behavior when working with X-Author for Contracts for Conga CLM (Contracts for Salesforce).
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Conga Internal ID	Description
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XAJS-3386	<p>On performing Update from CLM and Preview Reconcile, the Contract date format in Croatian is converted to an invalid date.</p>
XAJS-3301	<p>When you generate an agreement using a non-localized template, a currency prefix symbol is added to the currency data type field.</p> <p>Workaround: Set APTS_DoNotPrefixCurrency admin entry to true while generating agreement documents.</p>
XAJS-3054	<p>After inserting a smart clause in an agreement, the Conditional Segment within the clause does not appear as per the condition set for the clause.</p>
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XAJS-2964	On clicking Reject changes, smart fields are appended with current values instead of replacing the value.
XAJS-2931	When an Agreement Status Category or Status is restricted for check-in and check-out, the restriction message does not appear for an offline agreement document. The offline document checks in successfully.
XAJS-2516	Inserting a nested clause disorganizes the clauses on the Doc Clauses tab.
XAJS-2700	A few built-in style segments do not apply in the generated document.
XAJS-2769	The Select Styles window is not displaying custom styles.
XAJS-2638	The loading time of the Preview Reconciliation window is more than 30 seconds on updating the content.
XAJS-2640	Using the Hide Smart Boundary option displays the smart boundary on pressing Command+Z.

Conga Internal ID	Description
XAJ5-2703	If an agreement document has any read-only lookup fields in the repeat table under repeat section, the XAJ5 pane stops responding on using the Update from CLM option.
XAJ5-2556	Updating a clause for the second time is not appearing in the Refresh Clauses tab.

About X-Author for Contracts

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

Prior to Winter '20 release, X-Author for Contracts was supported for Conga CLM. Using X-Author for Contracts, the Conga CLM users can manage the entire contract and template process. From Winter '20 release, X-Author for Contracts introduces support for Conga CLM (Contracts for Salesforce). Using X-Author for Contracts, the Conga CLM (Contracts for Salesforce) users can manage the entire contract template process.

This guide describes the following features for Conga CLM and Conga CLM (Contracts for Salesforce).

	Features for Conga CLM	Features for Conga CLM (Contracts for Salesforce)
Templates	Create a template	Create a template
	Search and open a template	Search and open a template
	Check-in a template	Check-in a template

	Features for Conga CLM	Features for Conga CLM (Contracts for Salesforce)
	Clauses <ul style="list-style-type: none"> • Use Playbook for templates • Insert inline clauses • Make clauses smart or read-only • Make clauses conditional • Mark clauses • Refresh clause 	Clauses <ul style="list-style-type: none"> • Use Clause Library for templates • Insert clause and clause bundles • Make clause and clause bundle smart • Make clause and clause bundle conditional
	Fields <ul style="list-style-type: none"> • Insert fields • Insert fields as a table or section • Make fields smart or read-only • Make columns and rows conditional in a table 	Fields <ul style="list-style-type: none"> • Insert fields • Insert fields as a table or section • Make fields smart or read-only • Make columns and rows conditional in a table
	Set segments (conditional or style)	Set segments (conditional or style)
	Define template locale	Define template locale
	Clone a template	NA
	Template Versioning	NA
	Contracts	Search and open an agreement
	Check-in an agreement	NA
	Check-out an agreement	NA
	Lock or unlock agreement documents	NA

	Features for Conga CLM	Features for Conga CLM (Contracts for Salesforce)
	<p>Clauses</p> <ul style="list-style-type: none"> • Use Playbook to insert clauses • Mark clauses • Unmark clauses • Edit or delete clauses • Hide or show smart boundaries • Unlock read-only clauses • Promote marked clauses to the playbook • Track clauses in an agreement 	NA
	<p>Fields</p> <ul style="list-style-type: none"> • 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 	NA
	Compare and merge agreements	NA
	Send an agreement for parallel review	NA
	<p>Work with offline agreements</p> <ul style="list-style-type: none"> • Create offline agreements • Import offline agreements 	NA
	Use Intelligent Discovery	NA
	Use Localization	NA
	Restrict agreement document check-in and check-out	NA

	Features for Conga CLM	Features for Conga CLM (Contracts for Salesforce)
	Reconciliation <ul style="list-style-type: none"> • Preview reconcile • Reconcile smart fields and smart clauses 	NA

The following table lists the tasks that users can perform using X-Author for Contracts.

- Working with X-Author for Contracts for Conga CLM
 - Creating a template
 - Searching and opening a template
 - Cloning a template
 - Checking in a template
 - Using Playbook for templates and agreements
 - Using clauses
 - Using fields
 - Using template versioning
 - Creating offline agreements
 - Importing offline agreements
 - Marking clauses and fields
 - Using template expression builder
 - Updating fields from Conga CLM
 - Comparing and merging agreement documents
 - Sending an agreement document for parallel review
 - Using Intelligent Discovery
- Working with X-Author for Contracts for Conga CLM (Contracts for Salesforce)
 - Creating a template
 - Searching and opening a template
 - Checking in a template
 - Using Clause Library for templates
 - Using fields
 - Using clauses
 - Setting segments in a template
 - Using Template Locale

Rebranding

Prior to Winter '20 release, X-Author for Contracts was supported for Conga CLM. Using X-Author for Contracts, the Conga CLM users can manage the entire contract and template process. From Winter '20 release, X-Author for Contracts introduces support for Conga CLM (Contracts for Salesforce). Using X-Author for Contracts, the Conga CLM (Contracts for Salesforce) users can manage the entire contract template process.

Key Terminology

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

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 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 Conga CLM and had not previously been associated with an agreement.

Term	Definition
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	<p>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 Conga CLM.</p> <p>Values of smart fields and clauses can be reconciled when you check-in the agreement document in X-Author for Contracts.</p>
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.
Read-only Fields	<p>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 Conga CLM.</p> <p>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.</p>
X-Author for Contracts	A Microsoft Word add-in that enables the legal team of an organization to execute an entire contract lifecycle inside Microsoft Word.

What's New in X-Author for Contracts Documentation

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

Winter '20

Document	Topic	Description
Winter '20 Rev A	Intelligent Discovery	Modified topic. Renamed Intelligent Import.
	Hiding and Showing Smart Boundaries	Modified topic. Updated description.

Document	Topic	Description
Winter '20	<p data-bbox="293 376 576 409">Managing Templates</p> <ul style="list-style-type: none"> <li data-bbox="352 434 639 468">• Creating Templates <li data-bbox="352 472 647 506">• Opening a Template <li data-bbox="352 510 552 584">• Checking in a Template <li data-bbox="352 589 531 622">• Using Fields <li data-bbox="352 627 600 701">• Inserting Fields in Templates <li data-bbox="352 705 643 779">• Making Fields Smart in Templates <li data-bbox="352 784 639 857">• Making Fields Read-Only in Templates <li data-bbox="352 862 600 936">• Inserting Fields in Templates as a Table <li data-bbox="352 940 624 1014">• Making Table Columns and Rows Conditional <li data-bbox="352 1019 600 1093">• Inserting Fields in Templates as a Section <li data-bbox="352 1097 560 1131">• Using Clauses <li data-bbox="352 1135 647 1209">• Using Clause Library for Templates <li data-bbox="352 1214 600 1288">• Inserting Clauses into a Template <li data-bbox="352 1292 584 1366">• Inserting Clause Bundles into a Template <li data-bbox="352 1370 643 1444">• Making Clauses and Clause Bundles Smart in a Template <li data-bbox="352 1449 643 1523">• Making Clauses and Clause Bundles Conditional in a Template <li data-bbox="352 1527 616 1601">• Setting Segment in Templates <li data-bbox="352 1606 584 1680">• Using Template Locale 	<p data-bbox="676 376 1425 528">New topic. X-Author for Contracts introduces support for Conga CLM (Contracts for Salesforce). All the features listed in the Topic are supported for Conga CLM (Contracts for Salesforce).</p>

Document	Topic	Description
	<ul style="list-style-type: none"> Changing Field Level Locale 	
	Installing Pre-release X-Author for Contracts	Modified topic. Updated steps to install pre-release X-Author for Contracts.
	Upgrading X-Author for Contracts	Modified topic. Updated steps to upgrade.
	Changing Installation Approach	New topic.
	Opening an Agreement Document	Modified topic. Added a limitation about date picker.

Summer '20

Summer '20	Installing Production X-Author™ for Contracts 2.0	Modified topic. <ul style="list-style-type: none"> • Added content about Centralized Deployment approach • Added content about support for Windows operating system • Updated installation steps
	Making Clauses Read-Only in a Template	New topic. A new feature for this release.
	Unlocking Read-Only Clause	Modified topic. Updated description of the topic.
	Making Clauses Smart in a Template	Modified topic. Updated the screenshot.
	Creating New Templates	Modified topic. Added content for new fields like Name, Agreement Type, Category, Subcategory, Language, Keywords, Next Revision Date, Description, and Guidance.
	Intelligent Discovery	New topic. A new feature for this release.
	Template Versioning	New topic. A new feature for this release.
	Creating New Template Versions	New topic. A new feature for this release.
	Opening Template Versions	New topic. A new feature for this release.
	Locking and Unlocking Templates	New topic. A new feature for this release.
	Checking In Template Versions	New topic. A new feature for this release.

	Cloning Template Versions	New topic. A new feature for this release.
	Using Playbook	Modified topic. Added content for working with non-versioned clause templates.
	Promoting Clauses to Playbook	Modified topic. Added a note for template versioning.
	Creating Offline Agreements	Modified topic. Updated the screenshot.
	Inserting Fields in a Template as a Table	Modified topic. Added a step about making columns and rows conditional in a table.
	Making Columns and Rows Conditional in a Table	New topic. A new feature for this release.
	Logging into X-Author™ for Contracts 2.0	Modified topic. Removed Prerequisite and updated steps to log in.
	Opening an Agreement Document	Modified topic. Added product limitations.
	Refreshing Clauses in a Template	Modified topic. Added behavior and limitations.
	Marking Clauses	Modified topic. Added behavior and recommendation.
	Upgrading X-Author™ for Contracts 2.0	Modified topic. Added a note about Centralized Deployment.

Spring '20

Docu ment	Topic	Description
Spring '20 Rev A	Updating Multiple Smart Fields in a Document	New topic.
Spring '20	Support for Office 365	X-Author for Contracts provides beta support for Office 365 online and is open to a limited audience. If you want to know more about the feature or you have any queries, please contact Product Management.

Winter '19

Docu ment	Topic	Description
Winter '19	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.

Docu ment	Topic	Description
	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.
	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.

Docu ment	Topic	Description
	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 '19

Document	Topic	Description
Summer '19	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.
	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 '19

Document	Topic	Description
Spring '19	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 '18

Document	Topic	Description
Winter '18	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 '18

Document	Topic	Description
Summer '18	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.
	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.

Document	Topic	Description
	About Template Clauses	Renamed to About Template Clauses Menu.

X-Author for Contracts for Users

With the X-Author for Contracts User Guide, you can find out how X-Author for Contracts (previously known as X-Author for Contracts 2.0) works with Conga CLM and Conga CLM (Contracts for Salesforce), 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 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 or Clause Library. It covers step-by-step instructions, and use cases for the features provided by X-Author for Contracts.
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 XAC 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 in X-Author for Contracts topic.
Other Resources	Refer to the Conga CLM documentation for detailed instructions for installing and setting-up Conga CLM in your organization.

i Prior to Winter '20 release, X-Author for Contracts was supported for Conga CLM. Using X-Author for Contracts, the Conga CLM users can manage the entire contract and template process. From Winter '20 release, X-Author for Contracts introduces support for Conga CLM (Contracts for Salesforce). Using X-Author for Contracts, the Conga CLM (Contracts for Salesforce) users can manage the entire contract template process.

This guide describes the following tasks:

- Working with X-Author for Contracts for Conga CLM
 - Creating a template
 - Searching and opening a template
 - Cloning a template
 - Checking in a template
 - Using Playbook for templates and agreements

- Using clauses
- Using fields
- Using template versioning
- Creating offline agreements
- Importing offline agreements
- Marking clauses and fields
- Using template expression builder
- Updating fields from Conga CLM
- Comparing and merging agreement documents
- Sending an agreement document for parallel review
- Using Intelligent Discovery
- Working with X-Author for Contracts for Conga CLM (Contracts for Salesforce)
 - Creating a template
 - Searching and opening a template
 - Checking in a template
 - Using Clause Library for templates
 - Using fields
 - Using clauses
 - Setting segments in a template
 - Using Template Locale

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

- Basic Salesforce administration
- Microsoft Word
- Conga terms and definitions

Select one of the following topics for more information:

- [Getting Started](#)
- [Working with Conga CLM](#)
- [Working with Conga CLM \(Contracts for Salesforce\)](#)
- [FAQs](#)

Getting Started

X-Author for Contracts add-in works with both Conga CLM and Conga CLM (Contracts for Salesforce). For both products, the add-in can be installed and accessed the same way.

This section covers:

- [Installing Production X-Author for Contracts](#)
- [Centralized Deployment](#)
- [Installing Pre-Release X-Author for Contracts](#)
- [Logging into X-Author for Contracts](#)
- [Upgrading X-Author for Contracts](#)

Installing Production X-Author for Contracts

X-Author for Contracts is a Microsoft Word add-in that can be installed using the below approach :

- [Centralized Deployment via the Office 365 admin center](#)
Using Centralized Deployment, Office 365 administrator can install the add-in and assign the add-in to users in your organization.

You can install the X-Author for Contracts add-in on both Windows operating system and Mac operating system.

Centralized Deployment

You can install the X-Author for Contracts add-in using Centralized Deployment via the Office 365 admin center. Centralized Deployment supports both Windows operating system and Mac operating system and the deployment approach is the same for both the operating systems.

To install the X-Author for Contracts add-in, the Office 365 administrator must first [deploy the X-Author for Contracts add-in](#) in Office 365. Deploying X-Author for Contracts add-in is a one-time activity. When the administrator installs the X-Author for Contracts add-in for the first time in their organization, only then the administrator need to deploy the add-in. During deployment, the administrator can assign the add-in to a user, to multiple users via a group, or to everyone in their organization. The users that are assigned add-in access, must [insert add-in in their Microsoft Word](#).

If the administrator needs to assign the add-in to new users after the administrator has installed X-Author for Contracts add-in using Centralized Deployment:

- No action is required if the add-in was assigned to Everyone.
- Add new users to the group if the add-in was assigned to Group.
- Give access to new users if the add-in was assigned to Specific users.

When the administrator assigns add-in to new users, the users must [insert add-in in their Microsoft Word](#).

The following table provides an overview of different administrator and user actions that need to be performed for different use cases:

Use case	Assign Users	Admin Action	User Action
Assigning add-in to users during the first-time installation	Everyone/Group/ Specific users	Deploy X-Author for Contracts add-in	Insert X-Author for Contracts add-in
Assigning add-in to new users after installation	Everyone	No action	Insert X-Author for Contracts add-in
	Group	Add new users to the group	Insert X-Author for Contracts add-in
	Specific users	Give access to new users	Insert X-Author for Contracts add-in

Deploying X-Author for Contracts Add-in

As an Office 365 administrator, you can deploy the X-Author for Contracts add-in and assign the add-in directly to a user, to multiple users via a group, or to everyone in your organization.


Prerequisites


- You must have the administrator role to deploy the add-in.
- You must have the X-Author for Contracts manifest file. You can [download the manifest file](#) from Apttus Community Portal.
- Ensure that your organization meets all requirements for using centralized deployment. For information about how to determine if your organization can use centralized deployment, see [Determine if Centralized Deployment of add-ins works for your Office 365 organization](#).

To download the X-Author for Contracts manifest file

Before you start the deployment in Office 365, you must download the X-Author for Contracts manifest file.

Prerequisite


- You must have login credentials to the Apttus Community Portal to be able to download the file.
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.
 4. In the DOWNLOAD FILE window, click **Confirm Download**.


 If you are installing the X-Author for Contracts add-in for pre-release, go to [Pre-release Install Center](#) and download the Pre-release manifest file.

To deploy X-Author for Contracts add-in

1. Sign in to Office 365 with your account.
2. Select the app launcher icon in the upper-left and select **Admin**.
3. In the navigation menu, click **Show more**, then select **Settings** and click **Services & add-ins**.
4. Select **Deploy Add-In** and click **Next** after reviewing the requirements.
5. On the **Centralized Deployment** page, select **I have the manifest file (.xml) on this device** option.
6. Click **Browse** to locate the manifest file (.xml) that you want to use.
7. On the **Assign Users** page, choose from **Everyone**, **Specific Users/Groups**, or **Only me**. Use the search box to find the users and groups to whom you want to deploy the add-in.
8. Click **Deploy**.

The X-Author for Contracts add-in is added to Office 365. Users to whom permission is given can directly insert the add-in in their Microsoft Word. It can take up to 24 hours for the add-in to show up for all users.

 For more information about installing, publishing, and managing add-ins using centralized deployment via the Office 365 admin center, see [Publish add-ins via Centralized Deployment](#) and [Manage deployment of add-ins](#). If you want to remove the add-in, see [Delete the add-in](#).

 If you are unable to install the X-Author for Contracts using Centralized Deployment, you can contact Support.


Inserting X-Author Contracts Add-in

Any user with add-in installation privileges can insert the X-Author Contracts add-in in their Microsoft Word.

To insert X-Author for Contracts add-in

1. Open Microsoft Word.
2. Sign in to Microsoft Word.
3. Select **Insert** tab and click **My Add-ins**.
4. Select **Admin Managed** tab.
5. In the Admin Managed tab, select **X-Author Contracts** add-in. If you are unable to see the add-in, click **Refresh**.
6. Click **Add**.

On the Home tab of Microsoft Word, you can see the X-Author Contracts ribbon.

 To remove the X-Author for Contracts add-in, right-click on the X-Author Contracts ribbon and click **Remove Add-in**.

Installing Pre-Release X-Author for Contracts

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

1. Go to <https://apttusportal.force.com/community/ApttusInstallCenterPreRelease>. You must log in to the Apttus Community Portal to be able to download the Pre-release manifest file.
2. Click **Download** available for X-Author for Contracts Pre-Release.
3. In the DOWNLOAD FILE window, click **Confirm Download**.
4. Use the Centralized Deployment approach to install the X-Author for Contracts add-in. For more information about installing X-Author for Contracts add-in using Centralized Deployment, see [Centralized Deployment](#).

Logging into X-Author for Contracts

Before you can work with your agreement documents in X-Author for Contracts, you must log in to your Salesforce org.


Prerequisites

- The X-Author for Contracts add-in must be installed and added in the Microsoft Word. For more information about installing the add-in, see [Install Production X-Author for Contracts](#).

To log in to X-Author for Contracts

1. Open a new document or the existing document in Microsoft Word.
2. Click **X-Author Contracts** ribbon on the Home tab. 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 **Login**.
5. If it is the first time you are logging in to your Salesforce org from the add-in, you may be prompted to allow access to X-Author for Contracts. Click **Allow** to proceed.

You are logged into the X-Author for Contracts add-in.

 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 log in.

To log out of X-Author for Contracts

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


Upgrading X-Author for Contracts


If you are an existing user and upgrading to the latest release using either the Centralized Deployment or Sideloaded approach, you need to download the latest manifest file from the install center.

Prerequisite

- You must have login credentials to the Apttus Community Portal to be able to download the X-Author for Contracts manifest file.

To download the latest manifest file

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.
4. In the DOWNLOAD FILE window, click **Confirm Download**.

 If you are an existing user and upgrading to Pre-release, go to [Pre-release Install Center](#) and download the X-Author for Contracts Pre-release manifest file.

To upgrade using centralized deployment

If you are an existing user and using the Centralized Deployment approach, download the latest manifest file and perform the following actions to upgrade the X-Author for Contracts add-in to the latest release:

1. As an Office 365 administrator, you need to update the manifest file in Office 365. For more information, see [Updating Office Add-ins that are published via Centralized Deployment](#).
2. Close the Microsoft Word application on your system (if open) and open it again.
3. In Microsoft Word, select **Insert** tab and click **My Add-ins**.
4. Select **Admin Managed** tab.
5. If you are unable to see the updates, click **Refresh**.

To upgrade using the sideloading approach

If you are an existing user and using the Sideloaded approach, download the latest manifest file and perform the following actions to upgrade the X-Author for Contracts add-in to the latest release:

1. Update the manifest file in your Mac system.
2. Close the Microsoft Word application on your system (if open) and open it again.
3. In Microsoft Word, select **Insert** tab and click **My Add-ins**.
4. If you are unable to see the updates, click **Refresh**.

⚠ Instead of using the Sideloaded approach, you are recommended to adopt the Centralized Deployment approach to access the X-Author for Contracts add-in. For more information about changing the installation approach, see [Changing Installation Approach](#).

Working with Conga CLM

The following sections describe the features you can use in X-Author for Contracts when working with Conga CLM.

- [Templates](#)
 - [Creating New Templates](#)
 - [Opening Templates](#)
 - [Cloning a Template](#)
 - [Checking In Templates](#)
 - [Clauses](#)
 - [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](#)
 - [Making Clauses Read-Only in a Template](#)
 - [Fields](#)
 - [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](#)
 - [Making Columns and Rows Conditional in a Table](#)
 - [Inserting Fields in a Template as a Section](#)
 - [Setting Segments in Templates](#)
 - [Defining Template Locale](#)
 - [Changing Field Format by Locale](#)
 - [Template Versioning](#)
 - [Creating New Template Versions](#)
 - [Opening Template Versions](#)
 - [Locking and Unlocking Templates](#)
 - [Checking In Template Versions](#)
 - [Cloning Template Versions](#)

- **Contracts**
 - Opening an Agreement Document
 - Locking and Unlocking Documents
 - Using Playbook
 - Marking Clauses
 - Inserting Clauses
 - Preview Reconciliation
 - Hiding or Showing Smart Boundaries
 - Unlocking Read-Only Clauses
 - Marking Fields
 - Doc Clauses
 - Doc Fields
 - Highlighting Smart and Read-Only Fields
 - Checking in an Agreement Document
 - Reconciliation
 - Updating Fields from Conga CLM
 - Opening Agreements in Conga CLM
 - Creating Offline Agreements
 - Importing Offline Agreements
 - Intelligent Discovery
 - Tracking Clauses in your Agreement Document
 - Localization
 - Use Case: Managing 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

Templates

A template is a common set of sections, clauses, text, and placeholders for terms and conditions. Templates can be merged with structured data to generate agreements or proposals. Templates are stored within a template repository and are used to create

quotes and contracts. A 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 Templates when working with agreement templates.

- [Creating New Templates](#)
- [Opening Templates](#)
- [Cloning a Template](#)
- [Checking In Templates](#)
- [Clauses](#)
- [Fields](#)
- [Setting Segments in Templates](#)
- [Defining Template Locale](#)
- [Template Versioning](#)

Creating New Templates

To get started with creating a new Agreement or Clause template in X-Author for Contracts, 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 for Contracts
2. From Contracts pane, click the left-hand menu icon  and select Templates.
3. In the Template pane, go to **Start > Create**.
4. In the Create New Template pane enter the following details, (fields marked with an asterisk * are required)

Field Name	Description
Name	Enter the name of the template.
Type	Choose the template type from the <i>Agreement, Clause, Proposal, Section, and Supporting Document</i> .

Field Name	Description
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 picklist, 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 picklist. Template categories are defined by the administrator, in Conga CLM. This field is usually used by template administrators to categorize templates created by them for easy access.
Subcategory	The subcategory is a dependent field. Subcategories are populated-based on the value chosen for Category. The subcategories are defined by the administrator, in Conga CLM.
Language	Choose the default template language from the picklist. The default language for the template is English (US).
Locale	Select the locale from the picklist. Locale allows you to define locale settings for number and currency precision, currency format, and date format. Locales can be system defaults or user-defined locales. You can configure custom locales in Contract Management. For more information, see <i>Adding Custom Locale topic</i> in Conga CLM Administrator Guide.
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, and Date formats.

Field Name	Description
<p>Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.</p>	
Field	Description
Date Format	Select an option from the picklist to choose the default format for all date fields in the template.
Currency Format	<p>Select an option from the picklist to choose the format for all currency fields in the template. Choose "None" to only display currency field values in generated documents.</p> <p>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.</p>
Number Precision	Select a number from 0-9 to define the precision for Number/Percent field values in the template. This allows you to define the number of digits to be displayed after the decimal (e.g., "2" if the Number/Percent field should display two digits following the decimal point).
Currency Precision	Select a number from 0-9 to define the precision for currency field values in the template. This allows you to define the number of digits to be displayed after the decimal in currency value (e.g., "2" if the currency field should display two digits following the decimal point).
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.
Next Revision Date	Select the date for the next revision of the template.
Description	Enter the description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded). Using this field, you can provide a detailed description of the template.

Field Name	Description
Guidance	Enter guidance to help users determine the purpose of the template.




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

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

Opening Templates

You can open any type of 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 add-in.
2. Log in to X-Author for Contracts.
3. From the Contracts pane, click the left-hand menu icon  and select **Templates**.
4. In the 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 the 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.


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 **Templates**.
2. In the 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 the 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., <i>Apttus__APTS_Agreement__c</i> 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 Conga CLM.
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 Conga CLM.
Language	Choose the default template language

Field	Description
Locale	Choose an option from the list to change the default locale for the template. You can configure custom locales in Conga CLM. For more information, see <i>Adding Custom Locale topic</i> in Conga CLM Administrator Guide.
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.	
Field	Description
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 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.)
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.

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 Conga CLM.

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 Conga CLM.

Prerequisite

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

To check-in a template

1. In the 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.
Type	It displays the selected template type. You can not edit the type while check-in.

Field	Description
Business Object	It displays the selected business object. You can not edit the business object while check-in.
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 Conga CLM.
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 Conga CLM.
Language	Choose the default template language
Locale	Select the locale from the drop-down. You can configure custom locales in Conga CLM. For more information, see <i>Adding Custom Locale topic</i> in Conga CLM Administrator Guide.
Enable Formatting	Select this checkbox to enable locale formatting at the template level for this template.


Field	Description
<p>Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.</p>	
Field	Description
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.)
Keywords*	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.
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.

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 Conga CLM. 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 Conga CLM.

 If you are using X-Author for Contracts add-in in the Windows version of Microsoft Word, the screen resolution must be up to 125% to select a date from the date picker. It doesn't work with a screen resolution of 150%.

Clauses

Clauses are modular blocks of text that are used frequently across multiple templates. You create clauses as described in [Creating New 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](#)
- [Making Clauses Read-Only 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.

i 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.

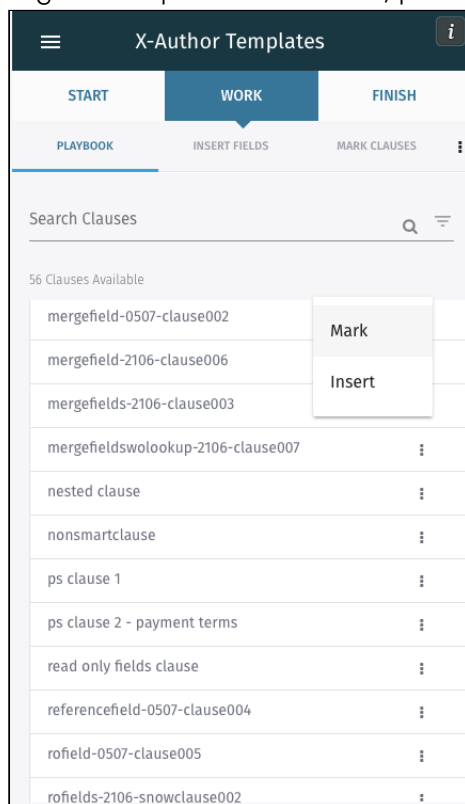
To insert a clause from Playbook into a template


1. In the 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.

i Note


You can configure custom locales in Conga CLM. For more information, see *Adding Custom Locale* topic in Conga CLM 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.

 You cannot search and insert an alternate clause from the Playbook.

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 make a clause in your template as 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.

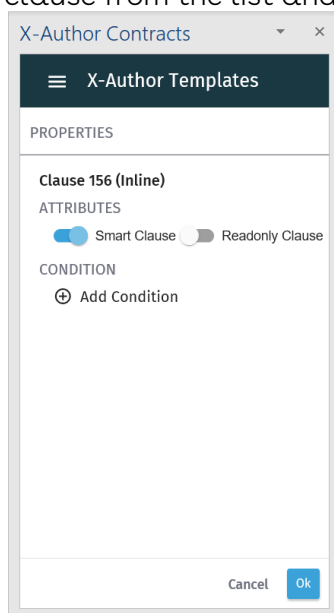
When you use a template that has smartness attribute enabled for its clauses, the generated agreement document will have smart clauses that can be tracked.

ⓘ A Note on Agreement Documents and Templates


All generated agreement documents (as opposed to imported offline agreements) use document templates saved in Conga CLM. These templates contain merge fields which, upon generation, pull field values from the agreement to create distributable documents.

To make a clause smart in a template

1. Open the template in X-Author for Contracts.
2. Log in to X-Author for Contracts and from the left-hand navigation select Templates.
3. In the 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 the toggle for **Smart Clause** attribute to enable it and click **Ok**.


 When you enable the **Readonly Clause** attribute, the value of **Smart Clause** attribute is disabled.

Your template clause will now have smartness property. To remove the smartness property of a clause, you can slide the **Smart Clause** attribute toggle 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 for Contracts.
2. Log in to X-Author for Contracts and from the left-hand navigation select Templates.
3. In the 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**.
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:

- You are recommended to only mark clauses that 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 for Contracts and select Templates from the left-hand navigation.
2. Go to **Start** tab in the 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: <ul style="list-style-type: none"> • <i>Green</i> • <i>Red</i> • <i>Yellow</i>
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 template 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 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 message.

Behavior and Limitations

- When you perform Refresh Clauses the default space inside a clause between two lines is removed. If you need additional space between the two lines, it is recommended that you manually give space.
- When you perform Refresh Clauses, one line of space is added after the clause.


Making Clauses Read-Only in a Template

You can make clauses in your X-Author templates, read-only. When you enable the read-only attribute for a clause in a template, that clause becomes uneditable in the generated document. You can mark a clause as read-only to restrict a user from editing the clause after a document is generated. You cannot edit or delete a read-only clause in a generated

document unless you have enabled 'XA_UnlockReadOnlyClause' custom permission in Conga CLM. For more information on how to unlock a read-only clause, see [Unlocking Read-Only Clauses](#).


Read-Only clauses have the following characteristics:

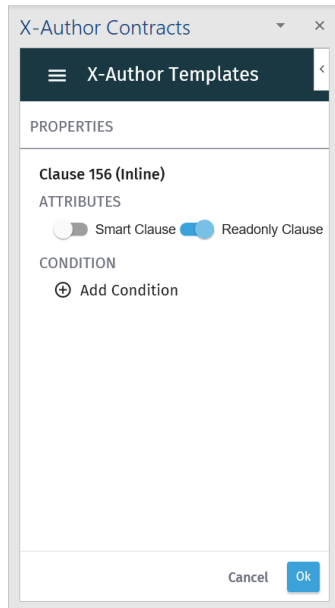
- Any clause can be made read-only.
- A read-only clause cannot be made smart.
- A read-only clause can only be defined in a template.
- A read-only clause shows a content control boundary in the generated agreement document.
- A read-only clause cannot be deleted in the generated agreement document.
- The value of the read-only clause cannot be edited in the generated agreement document.
- When you make a clause read-only, the smart fields or read-only fields inside that clause lose their smartness or read-only property and become plain-text fields.

 Read-only clause characteristics apply to clauses that are marked read-only in a template and do not apply to those clauses that are inserted from the Playbook after generating the agreement.


To make a clause read-only in a template

1. Open the template in X-Author for Contracts and log in to X-Author for Contracts.
2. From Contracts pane, click the left-hand menu icon  and select **Templates**.
3. In the 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 the toggle for **Readonly Clause** attribute to enable it and click **Ok**.

 When you enable the **Smart Clause** attribute, the value of **Readonly Clause** attribute is disabled.

Your template clause will now have read-only properties. To remove the read-only properties of a clause, you can slide the **Readonly Clause** attribute toggle to off position (greyed out).

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 Conga CLM. 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](#)
- [Making Columns and Rows Conditional in 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 for Contracts.
2. Click **Fields** in the **Work** tab.
3. Click **Insert New Fields** in the **Fields** section.
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 an Object (i.e., "Agreement") from the left column.
6. To search a field related to the selected object in the right column, enter a keyword and click the search icon (🔍) or press enter.
7. Select the required fields 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. The 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 Conga 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 Conga CLM 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 Templates pane, go to **Work tab > Fields**. If you cannot see the Fields tab, click more icon () and select **Fields**.
3. The 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 **Readonly Field** 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 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 Templates pane, go to **Work tab > Fields**. If you cannot see the Fields tab, click more  icon and select **Fields**.
3. The 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 the template with a 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 for Contracts.
2. Click **Fields** in the **Work** tab.
3. 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 popup.
4. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.
5. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
6. On Mac: in the window to the right, hold **command** and select one or more fields from the list. On Windows: hold **Ctrl** (keyboard key) and select the fields.

 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 **Insert**. A Repeat table is inserted into your template with each field displayed as a separate column.

9. To search inserted fields:
 - a. The **Fields** tab 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 Field** 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**.
13. To make columns and rows conditional, see [Making Columns and Rows Conditional in a Table](#).

Making Columns and Rows Conditional in a Table

You can mark any or all of the rows and columns in a table as conditional. In practice, these conditions operate as filters, allowing rows and columns in the table to be conditionally shown (and populated) or hidden. When you are constructing your template, you define various condition expressions on rows and columns of a table. These conditions are then evaluated at runtime when an agreement document is generated using the template.

For example, your table consists of 4 columns: **Product**, **Quantity**, **List Price**, and **Net Price**. You can define a condition to show the **Net Price** column only when the **Account Name** is ABC Company.

Product	Quantity	List Price	Net Price
Product	Quantity	List Price	Net Price

X-Author Contracts-Make Conditional ×

Make Conditional
Build expression to make selection conditionally shown

Select a column to make it conditionally shown: Net Price

	Field		Operator		Value	
1	Account Name	▼	Equals	▼	ABC Company	

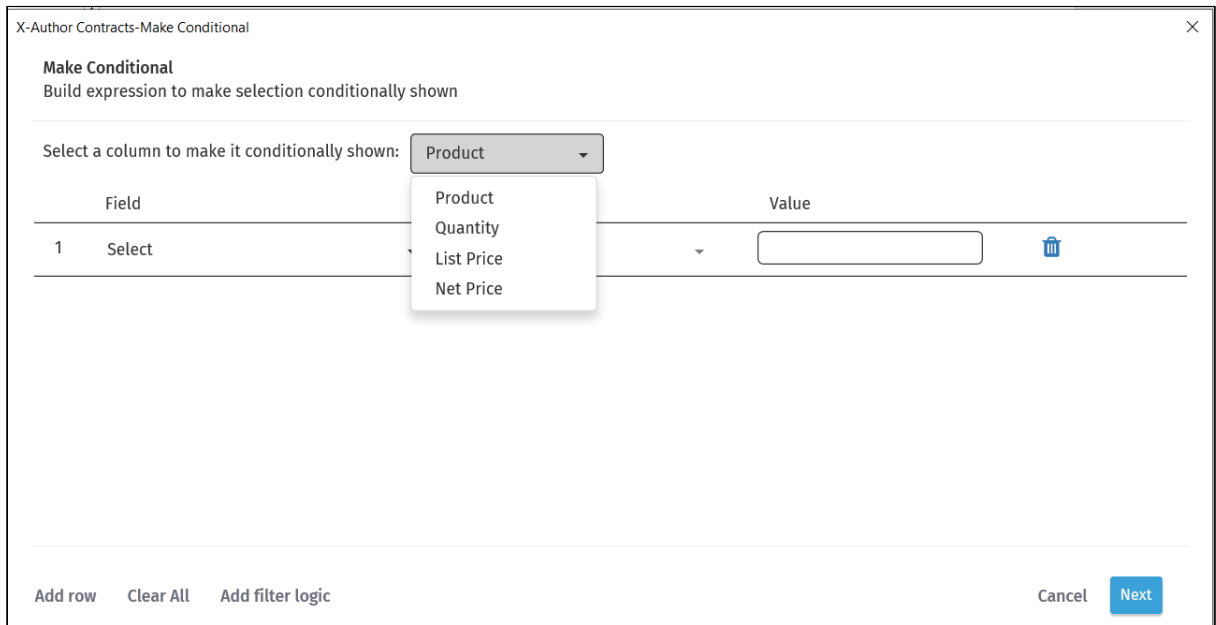
Add row Clear All Add filter logic

Cancel Next

To make columns conditional in a table


1. In the Templates pane, go to **Work** tab, click the more options icon () and select **Fields**. The Fields pane displays the Repeat Table.
2. Click the gear icon next to the Repeat Table name.
3. In the Properties pane, click **Add Condition** to open the template expression builder.

4. Select a column from the picklist at the top of the expression builder that you want to make conditional.





5. To create a conditional expression, enter values for the following fields:
 - **Field** - Select the field that you want to set as the criteria for the condition. You can select any field from the object (whose fields are displayed in the table) or the parent object (parent of the object whose fields are displayed in the table) or lookup objects. For example, if the table displays the fields from Service Plan Device object, **Field** lists all the available fields of Service Plan Device, Agreement Service Plan (parent object) and lookup objects for Service Plan Device and Agreement Service Plan.
 - **Operator** - You must select the logical operator from the picklist. This forms the relationship between the **Field** and its **Value**.
 - **Value** - Enter the value of the field name selected in the **Field**.
6. Click **Add row** to create additional expressions for the same column. You can create up to a maximum of 9 filters for a single column.
7. Click **Add filter logic** to add a logical relation between multiple rows. 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). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
8. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
9. Repeat steps 4 - 8 for each column you want to filter.

10. Click **Next** when you are finished to continue to the next screen in the *Expression Builder* to define any [conditional rows in your table](#) (see the next section for complete instructions).
11. Click **Add** to save your table filters and return to your document.

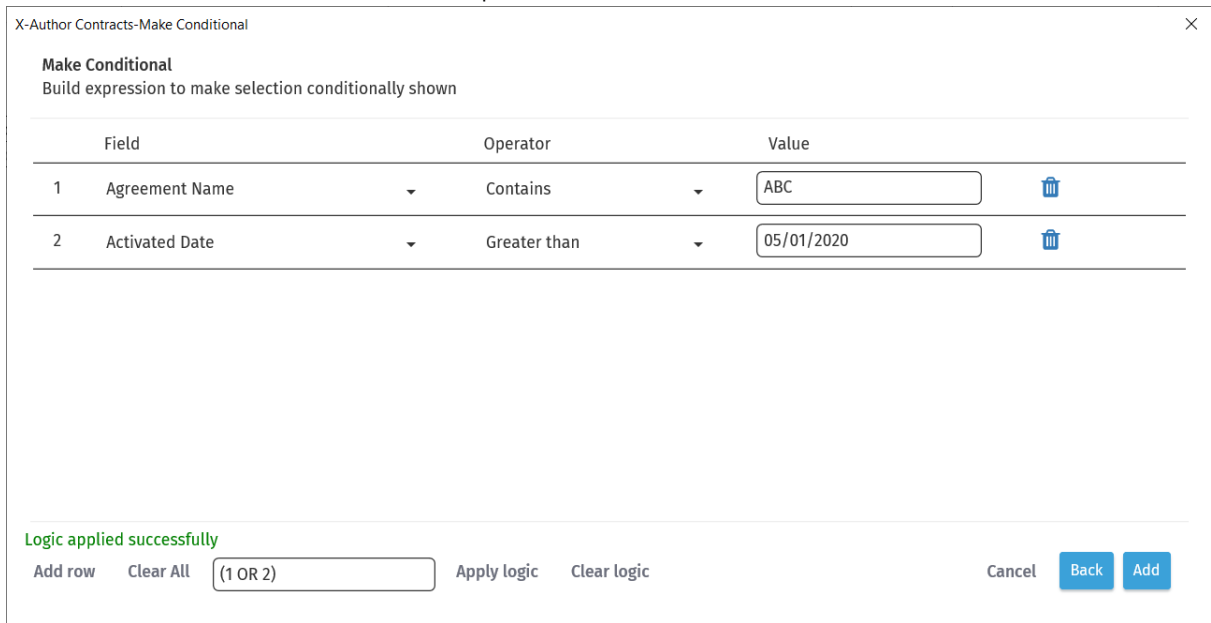
 If you are defining column filters for a table inside a section that contains third-level fields, you cannot apply column filters on objects that are not included in the table.

The column condition is created for the table. You can modify or delete the condition.

To make rows conditional in a table

1. In the Templates pane, go to **Work** tab, click the more options icon () and select **Fields**. The Fields pane displays the Repeat Table and the fields.
2. Click the gear icon  next to the Repeat Table name.
3. In the Properties pane, click **Add Condition** to open the template expression builder.
4. Follow instructions [from the previous section](#) to create conditional columns in the table.
5. Click **Next**.
6. To create a conditional expression, enter values for the following fields:
 - **Field** - Select the field that you want to set as the criteria for the condition. You can select any field from the parent object (parent of the object whose fields are displayed in the table), grandparent object (parent's parent), or lookup objects. For example, if the table displays the fields from Service Plan Device object, **Field** lists all the available fields of Agreement Service Plan (parent object), Agreement (grandparent object) and lookup objects for Agreement and Agreement Service Plan.
 - **Operator** - You must select the logical operator from the picklist. This forms the relationship between the **Field** and its **Value**.
 - **Value** - Enter the value of the field name selected in the **Field**.
7. Click **Add row** to create more conditional expressions. You can create up to a maximum of 9 rows of expression conditions to be used in a single expression.
8. Click **Add filter logic** to add a logical relation between multiple rows. 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). In the absence of a filter logic, the default relationship

between the rows is the boolean operator AND.



9. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
10. Click **Add** to save your table filters and return to your document.

The row condition is created for the table. You can modify or delete the condition.

To remove column and row conditions


1. In the Templates pane, go to **Work** tab, click the more options icon () and select **Fields**. The Fields pane displays the Repeat Table and the fields.
2. Click the gear icon next to the Repeat Table name.
3. In the Properties pane, click delete icon ()
4. Click **Remove**.


The column and row conditions are deleted for the table.



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 repeat section. This inserts each specified field on a new line when you select multiple fields (in the selected order). There is not a content-control boundary around a repeat section in the agreement document.


To insert fields in a template as a section

1. Open a template in X-Author for Contracts.
2. Click **Fields** in the **Work** tab.
3. 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 popup.
4. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.
5. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
6. On Mac: in the window to the right, hold **command** and select one or more fields from the list. On Windows: hold Ctrl (keyboard key) and select the fields.

 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 radio button **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 **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**.

To make a repeat section conditional in a template

1. The **Fields** tab displays the Repeat Section (object name) and the fields in the repeat section.
2. Click the gear icon () next to the selected repeat section to open the **Properties** page.
3. Click **Add Condition**. This opens the **Make Conditional** popup which has the expression builder.
4. In the **Make Conditional** popup, 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 values for the following three fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. You must select a field name. The fields are listed and grouped according to their hierarchy.
Operator	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 .

5. Click **Add row** to create more conditions. You can add up to 9 rows of condition expressions.
6. Click **Add filter logic** to add a logical relation between multiple rows of condition expressions. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have 5 rows you can create a filter logic like, (((1 AND 3) OR (2 AND 4)) AND 5). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
7. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
8. Click **Add** to save your table filters and click **Ok** to return to your document.

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 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 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 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 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 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 Conga CLM. You can configure custom locales in Conga CLM. For more information, see *Adding Custom Locale topic* in Conga CLM on *Salesforce Administrator Guide*.

Note

If a locale is deleted in Conga CLM 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 Conga CLM 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 Conga CLM, the Locale field is set to English (US).

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 **Templates**.
2. In the X-Author Templates pane, go to the **Work** tab > **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:
 - For date fields, you can change Locale and Date Format from their respective dropdown.
The Date Formats displayed are based on the Locale selected.
 - 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 Conga CLM is displayed. You can change the Currency Precision value as per your requirement.
 - 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 Conga CLM is displayed. You can change the Number Precision value as per your requirement.

Template Versioning

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

To summarize, template versioning allows template admins to:

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

The following sections in this guide provide step-by-step instructions for managing templates in X-Author for Contracts for orgs with Template Versioning enabled:

- [Creating New Template Versions](#)
- [Opening Template Versions](#)
- [Locking and Unlocking Templates](#)
- [Checking In Template Versions](#)
- [Cloning Template Versions](#)

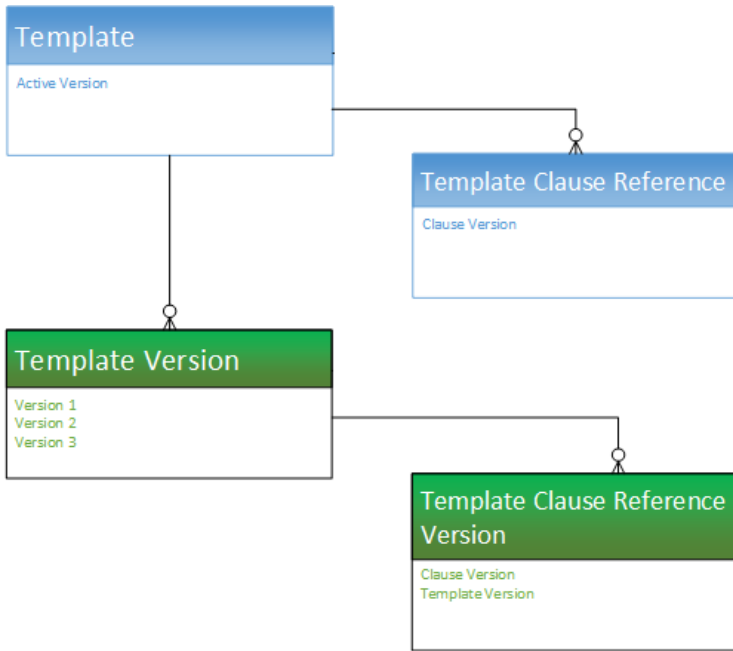
The behavior for versioned templates is different where described. All other X-Author for Contracts functionality remains unchanged.

To use Template Versioning it must be enabled for your org. For more information, see *Configuring Template Versioning* topic in the *Conga CLM on Salesforce Administrator Guide*.

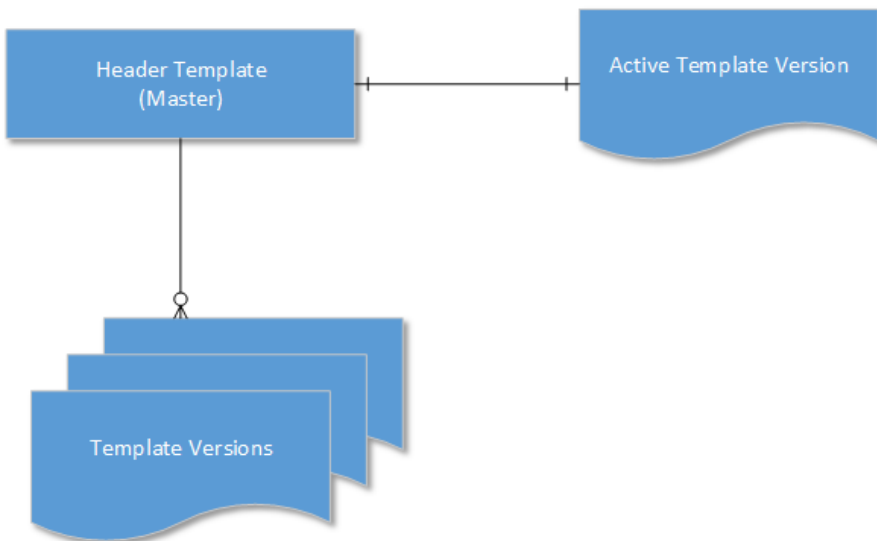
How Template Versioning Works

Each agreement or clause template in your org (with or without template versioning enabled) always consists of one template and multiple child references to clauses and sections contained in that template. For every instance of that template, there is always only one template that can be considered active (the version selected by the user to generate the contract or the version of the clause inserted into an agreement template).

More specifically, whenever a new template is created by any means, one instance of the template is created, stored in the Template object in Salesforce, and any clauses in the template are stored in the Template Clause Reference. The Template object has a master-detail relationship with the child object, as shown in the following figure.



Template Versioning preserves the same template, called the Header Template, which has a one-to-one relationship with the active version of the template and its child objects, and a one-to-many relationship with other versions of the template, which also have versioned clause and section references, but are considered inactive.



Template Versioning introduces two new objects:

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


When a user creates a new version of a template, the version information is incremented (e.g. from "1.00" to 2.00") and stored in the Template Version object and its child object.

When a template version becomes the active version, data from the Template Version object is copied to the Header Template object and that template version becomes the newly active version of the Header Template.

Creating New Template Versions





The process for creating a template is the same regardless of whether template versioning is enabled or disabled. For instructions on creating templates, see [Creating New Templates](#) in this guide.


Opening Template Versions

 This page contains instructions for opening templates when Template Versioning is enabled. For instructions on opening templates without versioning, see [Opening Templates](#) in this guide.

Using X-Author Templates, you can open any template version from the repository and make changes to static text and other content in the document. When the document is finalized, you can check in the template and modify properties as needed (for example, you can change which agreement types it is associated with). As with contracts, when you check out a template a lock is put on the document, preventing other users from editing it while you are working on it. After you release the lock or check in the template, the lock is released. Note that the lock only prevents other users from checking out the version you are working on, not every version of the template. For more information about locking and unlocking templates, see [Locking and Unlocking Templates](#).

To open a template version

1. Open Microsoft Word and launch the X-Author for Contracts add-in.
2. Log in to X-Author for Contracts.
3. From the Contracts pane, click the left-hand menu icon  and select **Templates**.
4. In the Templates pane, go to **Start tab > Search > Search Templates**.
5. Use the **Search** box to search for a 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. Click the **Search** icon  to display a list of templates that match your criteria.
7. From the list of templates, click the down arrow  for a template to expand and view Type, Business Object, Is Active flag, and Active Version of the template. Active Version is not displayed if the template is not active.



8. In the expanded description, click **Versions** to view a list of all versions of the template.
9. Select a template version to view the comments saved for that template version.
10. To open a template version, click the icon  and click **Open**. Your document is downloaded.
11. Check your Downloads folder for the file and open it in Microsoft Word.

Your template is opened. You can modify the template as per your requirement and check in your template.

Opening Templates with No Versions


You will likely have many templates in your org that were created before enabling Template Versioning. In this case, these templates will not have a template version. After Template Versioning is enabled, the first time you expand or select a non-versioned existing template, the system automatically creates an initial template version (1.00). You can open the newly created template version.


Locking and Unlocking Templates

When you open a template in X-Author Templates, the template is locked to prevent others from editing the document and checking in a new version while you are working on it. When you open a template it is automatically locked, which is indicated by the lock icon being closed . You can always check the lock status of a template by clicking the **Lock Status**  icon. This opens the Lock Status page with the following information:

- Template Name
- Template Version
- Template locked by
- Locked Date

To release a template lock

1. From the Templates pane, click the **Lock Status**  icon.
2. Click **Release Lock**.

After you release the lock, the icon changes to open . The template page refreshes and shows the **Start** tab of X-Author Templates. You cannot access the **Work** and **Finish** tabs of X-Author Templates after releasing the lock. When you click the **Lock Status** icon, the **Acquire Lock** button replaces the **Release Lock** button on the Lock Status page.

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

Checking In Template Versions

- i** This page contains instructions for checking in templates when Template Versioning is enabled. For instructions on checking in templates without versioning, see [Checking In Templates](#) in this guide.

After you create a new template or make changes to an existing template, you can check in the template to update its contents in Salesforce and create a new version.

To check in a template version

1. In the Templates pane, click the **Finish** tab.
2. Under **Check-In**, the following fields are displayed:

Field Name	Description
Name	Enter a new name for the template.
Current Version	It indicates the version you are currently working on. The current version is not displayed if the template is being checked in for the first time.
Type	It shows the type of template.
Business Object	It shows the business object of the template.
Agreement Types	From the picklist, 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 picklist. Template categories are defined in Conga CLM by the administrator.

Field Name	Description
Subcategory	A dependent field that is populated based on the value chosen for Category. Subcategory values are defined in Conga CLM by the administrator.
Language	Select the default template language from the picklist.
Locale	Select the locale from the picklist. You can configure custom locales in Conga CLM. For more information, see <i>Adding Custom Locale</i> topic in Conga CLM Administrator Guide.
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, and Date formats.

Field Name	Description
<p>Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.</p>	
Field	Description
Date Format	Select an option from the picklist to choose the default format for all date fields in the template.
Currency Format	<p>Select an option from the picklist to choose the format for all currency fields in the template. Choose "None" to only display currency field values in generated documents.</p> <p>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.</p>
Number Precision	Select 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	Select 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.)
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.
Next Revision Date	Select the date for the next revision of the template.
Description	Enter the description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded).
Guidance	Enter guidance to help users determine the purpose of the template.


Field Name	Description
Comments	Enter comments that apply to this version of the template.
Update Current Version	Check this box to update the current version you have checked out. This template will replace the current version and will not create a new version of the template. Update Current Version will not be displayed if the template is being checked in for the first time.
Active	Check this box to activate the new version of this template when check-in is completed. If disabled, the new version will still be checked in but the currently active version will remain the same. You must activate a template version 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.

The template version is checked in and the version number is incremented by 1 (unless Update Current Version is checked). For example, if you have checked out Template v2.00, when you check in the new version, it will be checked in as Template v3.00. Template version information is updated in Salesforce. When a template is checked-in for the first time, the version number is v1.00.


Cloning Template Versions

 This page contains instructions for cloning templates when Template Versioning is enabled. For instructions on cloning templates without versioning, see [Cloning a Template](#) in this guide.

You can clone a template when the need arises to have a template with similar language or elements. When you clone a template version, a new template record is created as version 1.00.

To clone a template version

1. Open Microsoft Word and launch the X-Author for Contracts add-in.
2. Open the template version you want to clone.

3. In the Templates pane, go to the **Work** tab. Click the more options  icon and select **Clone**.
4. 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 Name	Description
Name	Enter the name of the template.
Current Version	It indicates which version of the template you are cloning.
Type	It shows the type of template.
Business Object	It shows the business object of the template.
Agreement Types	From the picklist, 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	Select a category from the picklist. Template categories are defined in Conga CLM by the administrator.
Subcategory	A dependent field that is populated based on the value chosen for Category. Subcategory values are defined in Conga CLM by the administrator.
Language	Select the default template language from the picklist.
Locale	Select the locale from the picklist. You can configure custom locales in Conga CLM. For more information, see <i>Adding Custom Locale topic</i> in Conga CLM Administrator Guide.

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, and Date formats.
Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.	
Field	Description
Date Format	Select an option from the picklist to choose the default format for all date fields in the template.
Currency Format	Select an option from the picklist 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	Select 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	Select 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.)
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.
Next Revision Date	Select the date for the next revision of the template.
Description	Enter the description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded).

Field Name	Description
Guidance	Enter guidance to help users determine the purpose of the template.
Comments	Enter comments that apply to this version of the template.
Active	Check this box to activate the template. You must activate a template to use it for generating an agreement document.

5. Click **Save**.

After the cloning is successful, a copy of the template with the new name and header information is created as a new template record. The template version information is saved to the record as version 1.00.

Contracts

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 for Contracts when working with contract or agreement documents.

- [Opening an Agreement Document](#)
- [Using Playbook](#)
- [Doc Clauses](#)
- [Doc Fields](#)
- [Highlighting Smart and Read-Only Fields](#)
- [Checking in an Agreement Document](#)
- [Updating Fields from Conga CLM](#)
- [Opening Agreements in Conga CLM](#)
- [Creating Offline Agreements](#)
- [Importing Offline Agreements](#)
- [Intelligent Discovery](#)
- [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 Conga CLM, you must open it directly in X-Author for 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
- Download the document from Conga CLM and open it using X-Author for Contracts.

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


i If you are using X-Author for Contracts 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, you are recommended to close any unused applications on your system while working with X-Author for Contracts.

To open or open and update an agreement document

1. In the **Contracts** pane, go to **Start tab > Search > Search Agreements**. It displays all the agreement ordered by modified date.

i 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 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 keyword 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 Conga CLM. For more information, see [Updating Fields from Conga CLM](#).

Behavior and Limitations

- When you insert Microsoft Word's 3D shapes into your agreement document, the agreement document cannot be opened in X-Author for Contracts.
- When you download and open an agreement document from Conga CLM and convert it to X-Author for Contracts compatible, the converted document name and the original document name are not identical.
- When you create an agreement template in X-Author for Contracts 1.0 that includes date fields, generate an agreement document using that template and open the document in X-Author for Contracts, you will see a warning message. Click **Ok** to continue. The date picker is not available for date fields in the agreement document. However, you can edit date fields and the property of date fields is also retained.

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 for Contracts.


1. From the Contracts 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 Conga CLM 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 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**.

To use non-versioned clause templates

You will likely have many clause templates in your org that were created before enabling Template Versioning. In this case, these clause templates will not have a template version. You can access the non-versioned clause templates from Playbook after Template Versioning is enabled. The system assigns the existing non-versioned clause templates automatically as version 1.00 when you perform the following actions:

- Select the clause template
- Mark
- Insert
- Insert Smart

The version number is added to the Template record as Template Version. You can see the active version along with the text and guidance when selecting the clause. You can insert an active version of a clause from Playbook into the agreement document.


 For more information about Template Versioning, see [Template Versioning](#) topic.

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 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 agreement document.

To mark a new clause

1. In the 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, <i>Inserted</i> 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.


Field	Description
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: <ul style="list-style-type: none"> • 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 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 clause properties.


Behavior and Recommendations

If you mark a table as a clause by selecting the table only, you will see an error message. You are recommended to select some space before and after the table.

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 Clauses as Text:** There is not a content-control boundary around a clause that is inserted as text from Playbook. The clause contains static text and the content of the clause cannot be edited in an agreement document. Moreover, when you insert a clause as a text it is not recorded in the Doc Clauses list and the clause reconciliation page. If you insert a clause as text and that contains smart fields, the values in the smart fields are converted to plain text and do not have a content-control border.
- **Inserting Clauses as Smart:** A smart clause is a clause with a 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 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 displays the text of the clause, active version (If versioning is enabled in your Salesforce org), and guidance below the clause list. Click the clause text to scroll.

To insert a clause

1. In the 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 the 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 a text (or non-smart clause) in your document.

OR

Select the clause from the **Playbook** pane, click the 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 a clause as text and check in with any save option, you can view the clause entry in the Conga CLM Agreement Clause related list with action as InsertedAsText.

If you insert a clause as text inside a smart clause and check in with any save option, you can view the clause entry in the Conga CLM 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 [Tracking Agreement Clause Activity](#) in the Conga CLM Administrator Guide.

Behavior and Recommendations

Inserting a smart clause into a cell of a Microsoft Word table produces an error. To prevent this error, you must insert a space in the cell of the table before and after a clause.

Preview Reconciliation

The preview reconciliation feature allows you to preview the difference between the current or modified value in the document and the Conga CLM 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. The **Hide Smart Boundary** and **Show Smart Boundary** options are visible based on the **Hide Content Control Border** custom setting in the Conga CLM. Your administrator can configure the custom setting. For more information on configuring custom settings, refer to the **Comply System Properties** topic in the *Conga CLM Administrator Guide*. The following table provides the details about which option is displayed based on the **Hide Content Control Border** custom setting:

Hide Content Control Border custom setting when generating or checking-in the document	Result	Menu in Work tab
True	All smart boundaries are hidden while checking-out the document.	Show Smart Boundary
False	All smart boundaries are shown while checking-out the document.	Hide Smart Boundary


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 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 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

Read-only clauses are clauses with content control boundaries whose text cannot be edited in a generated agreement. However, as a Contract Administrator, you can grant certain users the permission to unlock the read-only clauses in the agreement document. This feature gives you more control on clause access and you can speed up the review or negotiation process by allowing certain users to edit the read-only clause. You can use the custom permission **XA_UnlockReadOnlyClause** to give edit access to read-only clauses. This permission must be associated with the user's profile to provide the user the access to the read-only clauses. When you enable **XA_UnlockReadOnlyClause** custom permission for a profile, the users of that profile get access to the **Unlock Clauses** option in the **Work** tab. Clicking **Unlock Clauses** scans the entire document and unlocks the read-only clauses present in the document. Update from Salesforce does not impact read-only clauses.

You can delete a read-only clause when:

- You have edit access to the read-only clause, which means, **XA_UnlockReadOnlyClause** custom permission is enabled.
- **UnlockSmartElement** custom setting is enabled, which means, the smartness property of the clause is unlocked.

Prerequisite

You must have **XA_UnlockReadOnlyClause** permission to view the **Unlock Clauses** option in the **Work** tab. For information on **XA_UnlockReadOnlyClause** custom permission, see Conga CLM 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 Clauses 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 the Conga 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.


Note 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 ~~strike through~~. 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 *Conga CLM Administrator Guide* for the Salesforce platform.

Unmarking a Clause

Unmarking a clause removes 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 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 **Doc 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. In the **Work** tab and click **Doc Fields**. 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 a field in the list to highlight the field in the document.
3. To change the current value of a field, place your cursor in the field's content control in the document, and make changes. To view the updated field value in the **Doc Fields** list, click some other tab and then click back the **Doc Fields** tab.
4. Click **Validate** to confirm that the new field value is valid for its corresponding data type.

 The changed field values are updated 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 **Mark 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 the Conga 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. Select the content in the document to be marked as a field.
2. In the **Work** tab, click the more options 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 options 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.

 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. You can not reject changes for fields that are marked using the Mark Field option.

To reject changes

1. In the **Work** tab, click **Doc Fields**.
2. Click the more options icon (⋮) next to 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.). For example, if the date format is not proper in the document, you get an error message when validating fields. The agreement document cannot be reconciled at check-in unless all fields in your document are valid.

To validate fields

1. In the **Work** tab, click **Doc Fields**.
2. Click the **Validate** button.
3. If any fields are invalid, an error message is displayed for the first invalid field. The first invalid field is also highlighted in the document.
4. Make corrections to the invalid field 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 Removal

There will be times in the negotiation when a negotiating party wants to remove language from an agreement that contains a smart field. According to document protection settings, users outside your org 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:

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

To mark fields for deletion

1. In the **Work** tab, click **Doc Fields**.
2. Click the more options icon () icon and select **Mark for Removal**.
3. Click **Delete** 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. In the **Work** tab, click **Doc Fields**.
2. Click the more options icon (⋮) icon and select **Undo Delete**.
3. Click **Undo** on the confirmation dialog that appears.

Highlighting Smart and Read-Only Fields

The highlight fields feature in the **Work** menu allows you to highlight smart and read-only fields in your agreement document.

To highlight smart and read-only fields

1. Open an agreement document in X-Author for Contracts.
2. In the **Work** tab, click the more icon (☐).
3. Click **Highlight Fields**.

All smart fields are highlighted in lime color and read-only fields are highlighted in yellow color. The highlight for fields is not retained when you check-in the document, send the document for review, or close Microsoft Word.

To remove highlight for smart and read-only fields

1. In the **Work** tab, click the more icon (⋮).
2. Click **Unhighlight Fields**.

This removes the highlights from the fields in the agreement document.

Mark Field and Highlighting

If **Highlight Fields** is already selected in the **Work** menu and you mark a text in the agreement document as a smart field (using the "Mark Field" option), the marked field is not automatically highlighted. Click **Unhighlight Fields** and **Highlight Fields** in the **Work** menu to highlight the new field.

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 Conga CLM	Save option available in X-Author for Contracts
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 Conga CLM Administrator Guide.

To check in an agreement document


1. From the 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.

Option at Check-in	Description
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, <code>_Final</code> 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 Conga CLM Administrator Guide.


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 Conga CLM 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 Conga CLM Administrator Guide for the Salesforce platform.


Reconciliation

X-Author for Contracts 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 Contracts 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 Conga CLM. 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 Conga CLM


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 Conga CLM. **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 Conga CLM, 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 Conga CLM

1. Check out your agreement document and go to **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 Conga 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 Conga CLM

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

To open an agreement in Conga CLM

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

A separate browser window is opened and the agreement is loaded in Conga CLM(You may be prompted to log in again to your Conga CLM 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 for Contracts.
2. Select the 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*	Enter the Account name.

Fields	Description
Contact*	Enter the Contact details.
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 Conga CLM. If the Enable Document Versioning comply system property is enabled in Conga CLM, 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 for Contracts.
2. Go to the **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 Conga CLM. 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](#).

Intelligent Discovery

You can use the Intelligent Discovery feature to automatically extract key data from third-party contract documents. Intelligent Discovery scans the third-party document, recognizes, and maps important metadata and clauses to the Conga CLM. You can control the visibility of the Intelligent Discovery feature in X-Author for Contracts. For more details, see *Configuring Intelligent Discovery Settings* topic in the Conga CLM Administrator Guide.

Previously, on importing an offline agreement, you had to manually find clauses and fields and mark them. Intelligent Discovery uses the pre-trained Artificial Intelligence-based clauses and fields AI Models to recognize the words that denote the clauses or fields in the third party document.

Pre-requisites:

- You must configure the Intelligent Discovery Settings in Conga CLM to view the **Intelligent Discovery** option in the **Work** tab. For more details, see *Configuring Intelligent Discovery Settings* topic in the Conga CLM Administrator Guide.
- You must create a mapping of record types and provisions. For more details, see *Mapping Record Types to Projects* topic in the Conga CLM Administrator Guide.

To perform the Intelligent Discovery

1. Check-in the third-party document as an [offline agreement](#) in X-Author Contracts.
2. Check-out the offline agreement document.
3. From the Contracts pane, go to **Work** tab and click **Intelligent Discovery**.
4. Click **Yes**.

Your document is sent for the Intelligent Discovery and you will see a confirmation message. Click **Review Import Result** to check the progress of Intelligent Discovery. You will receive an email on Intelligent Discovery status after clicking the **Review Import Result**.

After clicking the **Review Import Results**, the status of the agreement changes in Conga CLM. For more information on change of statuses in Conga CLM, see [Status Changes in Offline Agreements](#).

After the Intelligent Discovery has performed the data extraction successfully, you will receive an email. You can see the fields and clauses recognized from the document in X-Author Contracts. The **Doc Fields** and **Doc Clauses** in **Work** tab shows the list of fields and clauses identified in the document. If you find that some field or clause is incorrectly

marked, you can remove the identified clause or field from the document. You can also mark other content as a field in the document.

To remove a marked field after Intelligent Discovery

1. Go to **Work** tab and click **Doc Fields**.
2. Select the incorrectly tagged field and click more options icon (⋮).
3. Click **Mark for Removal**.
4. Click **Delete** on the confirmation dialog that appears.

To remove a marked clause after Intelligent Discovery

1. Go to **Work** tab and click **Doc Clauses**.
2. Select the incorrectly tagged clause and click more options icon (⋮).
3. Click **Unmark**.
4. Click **Unmark** on the confirmation dialog that appears.

Additionally, clauses and fields extracted by Intelligent Discovery are converted into smart clauses and fields. Upon check-in with reconcile, it will promote all marked clauses.

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 Conga 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 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	Trigger point in X-Author for Contracts	Agreement Clauses - Action entry in Conga CLM
NA	NA	<i>Original</i> (after a document is generated)
Check-out a document	NA	NA
Modify a smart clause	Reconciliation	<i>Modified</i>
Delete a smart clause	Reconciliation	<i>Deleted</i>
Insert clause as smart in an agreement	Check-in with any save option	<i>Inserted</i>
Insert clause as text in an agreement	Check-in with any save option	<i>InsertedAsText</i>
Modify smart fields in a smart clause	Reconciliation	<i>FieldChangedOnly</i>
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 Conga CLM 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 (MAC). X-Author for Contractssupports multiple locales.

Note

You must create the template in X-Author for 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 for Contracts User Guide.

When you open a generated document in X-Author for Contracts 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 Conga CLM 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 (MAC).

Prerequisite

- You must create the template in X-Author for Contracts using the latest X-Author for Contracts Salesforce Template.
- You must disable the Enable Template Versioning property in the Conga CLM 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 Templates or Contracts 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 **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 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 Conga CLM 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. 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 Conga CLM application and click **Update from CLM**. The field values are updated in X-Author for Contracts 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 Conga CLM 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 Conga CLM, you can check in, check out, and work on the agreement documents of type - Files. For more information on the comply system properties, see Conga CLM 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.

i When Template Versioning is enabled and you promote a clause to Playbook, the system automatically creates an active version (v1.00) of the clause template. For more information about Template Versioning, see [Template Versioning](#) topic in this guide.

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.
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.
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 Conga CLM. 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. Conga CLM 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 Conga CLM 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
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 Conga CLM 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 results 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 the Email address, enter the name and email address of the recipient. Click **Add**.

Note

You cannot add the same reviewer in the 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. Press the **Enter** key on your keyboard to add a new line to the message.
By default subject line contains the Agreement Document Name and the message body contains Sender's Name and Agreement Number.
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 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 **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 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 Conga CLM. Only then the smart elements become available for deletion.
For more information on how to configure the comply system property, refer to Conga CLM 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 Conga CLM or checked out in X-Author Contracts.
- You are recommended 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 Conga CLM SOAP API Guide.

Working with Conga CLM (Contracts for Salesforce)


The following sections describe the features you can use in X-Author for Contracts when working with Conga CLM (Contracts for Salesforce).

- [Managing Templates](#)
 - [Creating Templates](#)
 - [Opening a Template](#)
 - [Checking In a Template](#)
 - [Using Fields](#)
 - [Inserting Fields in Templates](#)
 - [Making Fields Smart in Templates](#)
 - [Making Fields Read-Only in Templates](#)
 - [Inserting Fields in Templates as a Table](#)
 - [Making Table Columns and Rows Conditional](#)
 - [Inserting Fields in Templates as a Section](#)
 - [Using Clauses](#)
 - [Using Clause Library for Templates](#)
 - [Inserting Clauses into a Template](#)
 - [Inserting Clause Bundles into a Template](#)
 - [Making Clauses and Clause Bundles Smart in a Template](#)
 - [Making Clauses and Clause Bundles Conditional in a Template](#)
 - [Setting Segment in Templates](#)
 - [Using Template Locale](#)
 - [Changing Field Level Locale](#)

Managing Templates


This section walks the Conga CLM (Contracts for Salesforce) users through the setup of the entire contract template lifecycle within the scope of X-Author for Contracts. It covers information, step-by-step instructions, and use cases for the features provided by X-Author for Contracts.

You can use X-Author for Contracts to create or maintain contract templates and manage them within the Conga CLM (Contracts for Salesforce) system through the Templates. A contract template is a common set of sections, clauses, text, and placeholders for terms and conditions. Contract templates are stored within the Template object and are used to create contracts.


 For more information about Conga CLM (Contracts for Salesforce), see *Conga CLM (Contracts for Salesforce) User Guide*.

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

- [Creating Templates](#)
- [Opening a Template](#)
- [Checking In a Template](#)
- [Using Fields](#)
- [Using Clauses](#)
- [Setting Segment in Templates](#)
- [Using Template Locale](#)

 If you are a Conga CLM user and you are looking for information regarding template creation, see [Templates](#).

Creating Templates

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding template creation, see [Creating New Templates](#).

To get started with creating a new agreement template in X-Author for Contracts, 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 for Contracts.
2. Click **New Template** in the Templates pane.
3. In the **Create New Template** pane enter the following details:

Field Name	Description
Name	Enter the name of the template.
Business Object	Business object defines the set of fields available for a template. Business objects can be standard objects or custom objects. You can configure custom business objects in Conga CLM (Contracts for Salesforce). This field is only displayed when multiple business objects are configured in the Conga CLM (Contracts for Salesforce). If one business object is configured, the created templated is assigned to the Contract Template business object. For more information about creating custom business objects, refer to <i>Configuring Business Objects for Use with X-Author for Contracts</i> topic in <i>Conga CLM (Contracts for Salesforce) User Guide</i> .
Agreement Types	From the picklist, you can select multiple agreement types to associate with your template. The value of Agreement Types decides which templates are available during agreement generation in Conga CLM (Contracts for Salesforce).
Category	Choose the category from the picklist. Template categories are defined in Conga CLM (Contracts for Salesforce) by the administrator. This field is usually used by template administrators to categorize templates created by them for easy access.
Subcategory	The subcategory is a dependent field. Subcategories are populated based on the value chosen for Category. Subcategories are defined in Conga CLM (Contracts for Salesforce) by the administrator.

Field Name	Description
Language	Choose any language from the picklist. The default language for the template is English (US).
Locale	Choose the locale from the picklist. Locale allows you to define locale settings for number and currency precision, currency format, and date format. Locales can be system defaults or user-defined locales. You can configure custom locales in Conga CLM (Contracts for Salesforce). For more information about configuring locale, refer to <i>Managing X-Author for Contracts Templates</i> topic in <i>Conga CLM (Contracts for Salesforce) User Guide</i> .
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 Date Format, Currency Format, Number Precision, and Currency Precision.


Field Name	Description
<p>Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.</p>	
Field	Description
Date Format	Select an option from the picklist to choose the default format for all date fields in the template. Date format is a dynamic field to the locale selected.
Currency Format	Select an option from the picklist 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	Select a number from 0-9 to define the precision for Number/Percent field values in the template. This allows you to define the number of digits to be displayed after the decimal (e.g., "2" if the Number/Percent field should display two digits following the decimal point).
Currency Precision	Select a number from 0-9 to define the precision for currency field values in the template. This allows you to define the number of digits to be displayed after the decimal in currency value (e.g., "2" if the currency field should display two digits following the decimal point).
Keywords	Enter comma-separated keywords to associate with the template. Keywords make it easier to search the templates.
Next Revision Date	Select the date for the next revision of the template.
Description	Enter the description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded). Using this field, you can provide a detailed description of the template.

Field Name	Description
Guidance	Enter guidance to help users determine the purpose of the template.

4. Click **Create**.

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

Opening a Template

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding opening a template, see [Opening Templates](#).

You can open any agreement template from the repository and make changes to static text and other content in the document. When the document is finalized, you can check in the template and modify properties as needed.

To open a template

1. Open an existing document or a blank document in Microsoft Word and log in to X-Author for Contracts.
2. Use the **Search Templates** box to search for a template by keyword. Click the filter icon (☰) to expose drop-down menus that can help you to refine your search according to Category, Subcategory, Locale, and Language.
3. Click the **Search** icon (🔍) to display a list of templates that match your criteria. To clear the filter criteria and view the entire list of templates:
 - a. Click **Clear Filters**.
 - b. Click **Apply Filters**.
4. From the list of templates, click the down arrow (▼) to expand and view the Guidance for the template.
5. Click **Open** to download a copy of the template.
6. 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.

Checking In a Template

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding checking in a template, see [Checking In Templates](#).

After you create a new template or make changes to an existing template, you can check in the template to update its content in Salesforce.

Prerequisite

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

To check-in a template

1. In the Templates pane, click the **Finish** tab.
2. Under Check In, enter values for the following fields:

Field	Description
Name	Enter a new name for the template.
Business Object	Business object defines the set of fields available for a template. Business objects can be standard objects or custom objects. You can configure custom business objects in Conga CLM (Contracts for Salesforce). This field is only displayed when multiple business objects are configured in the Conga CLM (Contracts for Salesforce). If one business object is configured, the checked-in templated is assigned to the Contract Template business object. For more information about creating custom business objects, refer to <i>Configuring Business Objects for Use with X-Author for Contracts</i> topic in <i>Conga CLM (Contracts for Salesforce) User Guide</i> .
Agreement Types	From the picklist, you can select multiple agreement types to associate with your template. The value of Agreement Types decides which templates are available during agreement generation in Conga CLM (Contracts for Salesforce).

Field	Description
Category	Choose the category from the picklist. Template categories are defined in Conga CLM (Contracts for Salesforce) by the administrator. This field is usually used by template administrators to categorize templates created by them for easy access.
Subcategory	The subcategory is a dependent field. Subcategories are populated based on the value chosen for Category. Subcategories are defined in Conga CLM (Contracts for Salesforce) by the administrator.
Language	Choose any language from the picklist. The default language for the template is English (US).
Locale	Choose the locale from the picklist. Locale allows you to define locale settings for number and currency precision, currency format, and date format. Locales can be system defaults or user-defined locales. You can configure custom locales in Conga CLM (Contracts for Salesforce). For more information about configuring locale, refer to <i>Managing X-Author for Contracts Templates</i> topic in <i>Conga CLM (Contracts for Salesforce) User Guide</i> .
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 Date Format, Currency Format, Number Precision, and Currency Precision.


Field	Description
Optional: Specify the following fields when "Enable Formatting" is selected to modify locale formatting.	
Field	Description
Date Format	Select an option from the picklist to choose the default format for all date fields in the template. Date format is a dynamic field to the locale selected.
Currency Format	Select an option from the picklist 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	Select a number from 0-9 to define the precision for Number/Percent field values in the template. This allows you to define the number of digits to be displayed after the decimal (e.g., "2" if the Number/Percent field should display two digits following the decimal point).
Currency Precision	Select a number from 0-9 to define the precision for currency field values in the template. This allows you to define the number of digits to be displayed after the decimal in currency value (e.g., "2" if the currency field should display two digits following the decimal point).
Keyword	Enter comma-separated keywords to associate with the template. Keywords make it easier to search for templates.
Next Revision Date	Select the date for the next revision of the template.
Description	Enter the description for the template. Maximum of 255 characters (an error will be thrown if this limit is exceeded). Using this field, you can provide a detailed description of the template.

Field	Description
Guidance	Enter new guidance or modify existing guidance to help users determine the purpose of the template.
Active	By default, the template is active. To deactivate the template, slide the Active toggle to the off position. The template must be active 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 Clause Library to insert clauses and clause bundles.

Using Fields

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding Fields, see [Fields](#).

Fields that you insert in your template, or "merge fields" as they are sometimes called, represent the contractual terms and metadata from your Contract Agreement record in Conga CLM (Contracts for Salesforce). 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.

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


- [Inserting Fields in Templates](#)
- [Making Fields Smart in Templates](#)
- [Making Fields Read-Only in Templates](#)
- [Inserting Fields in Templates as a Table](#)
- [Making Table Columns and Rows Conditional](#)
- [Inserting Fields in Templates as a Section](#)

Inserting Fields in Templates

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding inserting fields in a template, see [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 the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. Place the cursor in the section of the template text where you want to insert a field and click **Insert New Fields**.
4. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.
5. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
6. Select the required field and click **Insert**.


Tip

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

The fields are inserted into the template. The fields are marked by a content control boundary in your template. You can view the inserted fields, under the **Fields** pane. Select a field from the list to highlight it in the template document.


 Rich Text fields are not supported.

Making Fields Smart in Templates


 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding making fields smart in a template, see [Making Fields Smart in a Template](#).


Smart fields are specialized fields that can retain the field definition even after the Merge Service generates the Agreement document. 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. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. The **Fields** page shows the list of all the fields present in your template. Use the **Search Field** box to search for a field by keyword.
4. Select a field from the list and click the gear icon () next to field name.
5. In the Properties pane, click the toggle for **Smart Field** attribute to enable it.
6. Click **Ok**.

-  To remove the smartness property of a field, you can slide the **Smart Field** attribute toggle to off position (greyed out).

Making Fields Read-Only in Templates


-  This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding making fields read-only in a template, see [Making Fields Read-Only in a Template](#).

You can make fields in your templates, read-only. When you enable the read-only attribute for a field in a template, that field becomes uneditable in the generated document. You can mark a field as read-only to restrict a user from editing the field after a document is generated.


To mark a field read-only

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.

3. The **Fields** page shows the list of all the fields present in your template. Use the **Search Field** box to search for a field by keyword.
4. Select a field from the list and click the gear icon (⚙️) next to field name.
5. In the Properties pane, click the toggle for **Readonly Field** attribute to enable it.
6. Click **Ok**.


 To remove the read-only property of a field, you can slide the **Readonly Field** attribute toggle to off position (greyed out).


Inserting Fields in Templates as a Table

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding inserting fields in a template as a table, see [Inserting Fields in a Template as a table](#).

You can insert fields as a table in your template. The table is inserted into your template as a Repeat Table, meaning each separate line item record is populated as a row in the table, with field data populated in individual cells by column.

To insert fields in a template as a table

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. Place the cursor in the section of the template text where you want to insert a table and click **Insert New Fields**.
4. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.
5. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
6. Select the required fields. To select multiple fields, hold Ctrl (keyboard key) and select the fields. 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 **Insert**.

A Repeat Table is inserted into your template with each field displayed as a separate column.

To show or hide caption for a repeat table

1. Navigate to the **Fields** tab. This displays the Repeat Table (object name) and the fields in the repeat table.
2. Select the Repeat Table and click the gear icon (⚙️) next to Repeat Table.
3. In the Table Attributes section, turn on or off the **Show Caption** switch. By default, it is on.

To select table formatting when no data is present

1. Navigate to the **Fields** tab. This displays the Repeat Table (object name) and the fields in the repeat table.
2. Select the Repeat Table and click the gear icon (⚙️) next to Repeat Table.
3. In the Table Attributes section, click **Format**. This displays a drop-down menu. Select one of the following options based on your requirement.
 - a. To show table captions and one empty row, select **Show captions and one empty row**.
 - b. To show captions only and no rows, select **Show captions only**.
 - c. To remove the entire table from the generated document, select **Remove whole table**.
4. Click **Ok**.

To make an inserted field smart or read-only

1. Navigate to the **Fields** tab. This displays the Repeat Table (object name) and the fields in the repeat table.
2. Enter the field name in the **Search Field** and click the search icon (🔍).
3. Click the gear icon (⚙️) next to the selected field name to open the **Properties** page.
4. In the attributes list, turn on the **Smart Field** or **Readonly** toggle based on your requirement and click **Ok**.

Making Table Columns and Rows Conditional

⚠️ This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding making columns and rows conditional in a table, see [Making Columns and Rows Conditional in a Table](#).

You can mark any or all of the rows and columns in a table as conditional. In practice, these conditions operate as filters, allowing rows and columns in the table to be conditionally shown (and populated) or hidden. When you are constructing your template, you define various condition expressions on rows and columns of a table. These conditions are then evaluated at runtime when an agreement document is generated using the template.

For example, your table consists of 4 columns: **Product Type**, **Quantity**, **List Price**, and **Net Price**. You can define a condition to show the **Net Price** column only when the **Account Name** is ABC Company.

Product Type	Quantity	List Price	Net Price
Product Type	Quantity	List Price	Net Price

X-Author Contracts Staging-Make Conditional

Make Conditional
Build expression to make selection conditionally shown

Select a column to make it conditionally shown:

	Field	Operator	Value	
1	Account Name	Equals	ABC Company	

Add row Clear All Add filter logic Cancel **Next**

To make columns conditional in a table


1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. The **Fields** page shows the list of all the fields, repeat tables, and repeat sections present in your template. Use the **Search Field** box to search by keyword.
4. Click the gear icon () next to Repeat Table name.
5. In the Properties pane, click **Add Condition** to open the template expression builder.
6. Select a column from the picklist at the top of the expression builder that you want to make conditional.
7. To create a conditional expression, enter values for the following fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. You can select any field from the parent object (parent of the object whose fields are displayed in the table) or lookup objects. You must select a field name. The fields are listed and grouped according to their hierarchy.
Operator	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 .

8. Click **Add row** to create additional expressions for the same column. You can create up to a maximum of 9 filters for a single column.
9. Click **Add filter logic** to add a logical relation between multiple rows. 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). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
10. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
11. Repeat steps 4 - 10 for each column you want to filter.
12. Click **Next** when you are finished to continue to the next screen in the expression builder to define any conditional rows in your table (see the next section for complete instructions).
13. Click **Add** to save your table filters and click **Ok** to return to your document.

The column condition is created for the table. You can modify or delete the condition.

To make rows conditional in a table

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. The **Fields** page shows the list of all the fields, repeat tables, and repeat sections present in your template. Use the **Search Field** box to search by keyword.
4. Click the gear icon () next to Repeat Table name.
5. In the Properties pane, click **Add Condition** to open the template expression builder.
6. Follow instructions from the previous section to create conditional columns in the table.
7. Click **Next**.

8. To create a conditional expression, enter values for the following fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. You can select any field from the object, parent object (parent of the object whose fields are displayed in the table), grandparent object (parent's parent), or Lookup objects. You must select a field name. The fields are listed and grouped according to their hierarchy.
Operator	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 .


9. Click **Add row** to create more conditional expressions. You can create up to a maximum of 9 rows of expression conditions to be used in a single expression.
10. Click **Add filter logic** to add a logical relation between multiple rows. 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). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
11. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
12. Click **Add** to save your table filters and click **Ok** to return to your document.

The row condition is created for the table. You can modify or delete the condition.

To edit or remove column and row conditions


1. In the Templates pane, go to **Work** and click **Fields**.
2. Click the gear icon (⚙️) next to the Repeat Table name.
3. Click delete icon (🗑️) to remove the condition and click **Remove**.
4. Click edit icon (✏️) to edit the condition.


Inserting Fields in Templates as a Section

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding inserting fields in a template as a section, see [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 repeat section. This inserts each specified field on a new line when you select multiple fields (in the selected order).

To insert fields in a template as a section



1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. Place the cursor in the section of the template text where you want to insert a section and click **Insert New Fields**.
4. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.
5. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
6. Select the required fields. To select multiple fields, hold Ctrl (keyboard key) and select the fields.

 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 **Insert**.

A repeat section is inserted into your template with each field displayed one below the other.

To make an inserted field read-only

1. Navigate to the **Fields** tab. This displays the Repeat Section (object name) and the fields in the repeat section.
2. Enter the field name in the **Search Field** and click the search icon ().
3. Click the gear icon () next to the selected field name to open the **Properties** page.
4. In the attributes list, turn on the **Readonly** toggle.
5. Click **Ok**.

To make a repeat section conditional in a template




1. Navigate to the **Fields** tab. This displays the Repeat Section (object name) and the fields in the repeat section.
2. Click the gear icon () next to the selected repeat section to open the **Properties** page.

3. Click **Add Condition**. This opens the **Make Conditional** popup which has the expression builder.
4. In the **Make Conditional** popup, 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 values for the following three fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. You must select a field name. The fields are listed and grouped according to their hierarchy.
Operator	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 .


5. Click **Add row** to create more conditions. You can add up to 9 rows of condition expressions.
6. Click **Add filter logic** to add a logical relation between multiple rows of condition expressions. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have 5 rows you can create a filter logic like, (((1 AND 3) OR (2 AND 4)) AND 5). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
7. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
8. Click **Add** to save your table filters and click **Ok** to return to your document.


To edit or remove conditions from repeat section

1. In the Templates pane, go to **Work** and click **Fields**.
2. Click the gear icon () next to the repeat section name.
3. Click delete icon () to remove the condition and click **Remove**.
4. Click edit icon () to edit the condition.


To insert a table inside a repeat section

1. In the Templates pane, go to **Work** and click **Fields**.
2. Place the cursor in the repeat section where you want to insert a table and click **Insert New Fields**.
3. On the **Insert Field** popup, select an Object (i.e., "Agreement") from the left column.

4. To search a field related to the selected object in the right column, enter a keyword and click the search icon () or press enter.
5. Select the required fields. To select multiple fields, hold Ctrl (keyboard key) and select the fields.
6. Select the checkbox **Insert as a Table**.
7. Click **Insert**.

 You can also make any or all of the rows and columns in a table conditional. For more information about making table columns and row conditional, refer to [Making Table Columns and Rows Conditional](#).

Using Clauses


 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding Clauses, see [Clauses](#).

Clauses are modular blocks of text that are used frequently across multiple templates. You can create clauses and clause bundles in Conga CLM (Contracts for Salesforce). For more information about creating clauses and clause bundles, see *Clause Library for Conga Contracts For Salesforce* topic in Conga CLM (Contracts for Salesforce) User Guide. After a clause or clause bundle is created, you can use Clause Library to insert clauses or clause bundles into a template.

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

- [Using Clause Library for Templates](#)
- [Making Clauses and Clause Bundles Smart in a Template](#)
- [Making Clauses and Clause Bundles Conditional in a Template](#)

Using Clause Library for Templates

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding Using Playbook, see [Using Playbook for Templates](#).



Clause Library contains clauses and clause bundles that can be reused across multiple agreement templates. Clause Library helps you to search for clauses or clause bundles that can be inserted into templates as inline text. You cannot use the Clause Library 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 Clause Library.

Using Clause Library, you can perform the following actions:




- [Inserting Clauses into a Template](#)
- [Inserting Clause Bundles into a Template](#)

Inserting Clauses into a Template

To insert a clause from Clause Library into a template

1. In the Templates pane, go to **Work** and click **Clause Library**. It displays the list of all clauses.
2. Use the **Search clauses** box to search for a clause by keyword. Click the **Search** icon () to display a list of clauses.
3. Click the filter icon () to expose drop-down menus that can help you to refine your search according to Clause Type and Category.

To clear the filter criteria and view the entire list of clauses:

- a. Click **Clear Filters**.
 - b. Click **Apply Filters**.
4. From the list of clauses, click the more options icon () next to the clause name that you want to insert in the template.
 5. In your template document, place the cursor at the point of insertion and click **Insert**. The default clause configuration is inserted into your template.
 6. If the clause has more than one clause configuration, you see a **View Configurations** option when clicking the more options icon ().
 - a. Click **View Configurations**. You can view the Sub Clauses and Alternate Clauses in the Related Items list. Click the down arrow () for a Sub Clause or Alternate Clause to expand and view the text of the clause.
 - b. Select the required clause configuration from the **Configurations** drop-down list.
 - c. In your template document, place the cursor at the point of insertion and click **Insert**.

The selected clause configuration is inserted into your template.

You will see a success message on successfully inserting a clause. The clause content is marked by a content control boundary in your template. When you insert a clause configuration, only the main clause text is added to the template. When you generate an agreement document using the template, the sub clauses related to clause configuration

are inserted into the document. The sub clauses related to sub clauses are not inserted into the document. Only the first level hierarchy is supported when inserting clause configurations.

The clauses added to the templates and the sub clauses related to clauses are marked as smart by default. For more information, see [Making Clauses and Clause Bundles Smart in a Template](#).

To delete a clause



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

Behavior and Recommendation

- When you modify a clause in Conga CLM (Contracts for Salesforce) org after inserting the clause in a template, the modified clause is not updated in the template. The latest clause is added to the agreement document when you generate the document. For more information about generating an agreement document, refer to Conga CLM (Contracts for Salesforce) User Guide.
- When you create a new Clause Type and Category in Conga CLM (Contracts for Salesforce) org, you must log out and log in again to X-Author for Contracts to view the latest value in Clause Type and Category search filters.

Inserting Clause Bundles into a Template

To insert a bundle from Clause Library into a template

1. In the Templates pane, go to **Work** and click **Clause Library**.
2. Click **Bundles**. It displays the list of all clause bundles.
3. Use the **Search bundles** box to search for a bundle by keyword. Click the **Search** icon () to display a list of bundles.
4. From the list of bundles, click the more options icon () next to the bundle name that you want to insert in the template.
5. In your template document, place the cursor at the point of insertion and click **Insert**.

You will see a success message on successfully inserting a clause bundle. When you insert a bundle, a place holder for clause bundle is added in your template. The clause bundle place holder is marked by a content control boundary in your template. When you generate an agreement document using the template, the clause bundle place holder is replaced by clauses related to bundle and sub clauses related to the clause configurations in the document.

The bundles added to the templates and the clauses and sub clauses related to the bundle are marked as smart by default. For more information, see [Making Clauses and Clause Bundles Smart in a Template](#).


To delete a clause bundle

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

Behavior and Recommendation


- When you modify a clause bundle in Conga CLM (Contracts for Salesforce) org after inserting the clause bundle in a template, the modified clause bundle is not updated in the template. The latest clause bundle is added to the agreement document when you generate the document. For more information about generating an agreement document, refer to Conga CLM (Contracts for Salesforce) User Guide.

Making Clauses and Clause Bundles Smart in a Template

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding making clauses smart in a template, see [Making Clauses Smart in a Template](#).

Clauses and clause bundles that you insert into your template are marked as smart by default. The clauses within a clause bundle and sub clauses related to clause configuration are also marked as smart by default. When you use a template that has a smartness attribute enabled for its clauses, the generated agreement document will have smart clauses that can be edited.


To make a clause and bundle smart in a template

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Clauses**.
3. The Clauses pane lists all the clauses and clause bundles present in your template. Use the **Search Clause** box to search for a clause or clause bundle by keyword.
4. Select a clause or clause bundle from the list and click the gear icon () next to the clause name or clause bundle name.
5. In the **Properties** pane:
 - a. For a clause, click the toggle for **Smart Clause** attribute to enable it and click **Ok**.


- b. For a bundle, click the toggle for **Smart Bundle** attribute to enable it and click **Ok**.

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


Making Clauses and Clause Bundles Conditional in a Template

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding making clauses conditional in a template, see [Making Clauses Condition-based in a Template](#).

You can use condition-based clauses and clause bundles in your template to make more customized and flexible agreement templates. The condition for the condition-based clauses and clause bundles can be simple or complex expressions that you can make using the expression builder. The 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*.

 A condition created for a clause configuration is applicable for all the sub clauses related to the clause configuration. Similarly, a condition created for a clause bundle is applicable for all the clauses and sub clauses related to the clause bundle.

To add a condition to a clause and bundle

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Clauses**.
3. The Clauses pane lists all the clauses and clause bundles present in your template. Use the **Search Clause** box to search for a clause or clause bundle by keyword.
4. Select a clause or clause bundle from the list and click the gear icon () next to the clause name or clause bundle name.
5. In the Properties pane, click **Add Condition**. This opens the **Make Conditional** popup which has the expression builder.



6. In the **Make Conditional** popup, 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 values for the following three fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. The Field drop-down shows the Contract 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	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 .



7. Click **Add row** to create more conditions. You can add up to 9 rows of condition expressions.
8. Click **Add filter logic** to add a logical relation between multiple rows of condition expressions. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have 5 rows you can create a filter logic like, $((1 \text{ AND } 3) \text{ OR } (2 \text{ AND } 4)) \text{ AND } 5$. In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
9. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
10. Click **Add**.
11. Click **Ok** to save the condition. The properties page now shows the condition that you created.

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

To view and edit a condition


1. Go to the **Work tab** and click **Clauses** in Templates pane.
2. Select a clause or clause bundle from the clauses list.
3. Click the gear icon () next to the clause or clause bundle. This opens the **Properties** page and you can see the condition expression set for that clause or clause bundle.
4. To edit the condition, click the pencil icon () next to **Condition**.

To delete a condition

1. Go to the **Work tab** and click **Clauses** in Templates pane.
2. Select a clause or clause bundle from the clauses list.
3. Click the gear icon () next to the clause or clause bundle. This opens the **Properties** page and you can see the condition expression set for that clause or clause bundle.
4. Click delete icon (). You will see a confirmation message. Click **Remove**.
5. Click **Ok**.


The condition is deleted for the clause or clause bundle.

Setting Segment in Templates



 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding setting segments in a template, see [Setting Segments in Templates](#).

Set Segment feature allows you to either set a segment conditional, style, or both 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 the highlighted text, a clause, a group of text across clauses, or text with fields. Use 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 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** popup which has the expression builder.
3. In the **Make Conditional** popup, 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 values for the following three fields:

Field	Description
Field	Select the field which you want to set as the criteria for the condition. The Field drop-down shows the Contract 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	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 .

4. Click **Add row** to create more conditions. You can add up to 9 rows of condition expressions.
5. Click **Add filter logic** to add a logical relation between multiple rows of condition expressions. The supported filter logic operators are AND and OR. You can use parentheses for setting the precedence. For example, if you have 5 rows you can create a filter logic like, (((1 AND 3) OR (2 AND 4)) AND 5). In the absence of a filter logic, the default relationship between the rows is the boolean operator AND.
6. Click **Apply Logic** to check whether your filter logic expression is correct. If your logic is incorrect, you will see a message in red.
7. Click **Add**.
You will see the success message and your segment will be added as Segment Conditional to the segments list in the **Set Segment** pane. Selecting the segment name from the list highlights that segment in the template document.
8. To view or edit a segment condition:
 - a. Click the gear icon () next to the **Segment Conditional** in the **Set Segments** pane. This opens the **Segment Conditional** page and you can see the condition expression set for that segment.
 - b. To edit the condition, 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 segment conditional in a template

1. Go to the **Work tab** and click **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 Conditional**.
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 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 Style**. This opens the **Select Styles** popup 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. Click the gear icon () next to **Segment Regular** in the **Set Segments** pane. 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** popup 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** and click **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**.
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.

Using Template Locale

 This topic contains instructions for Conga CLM (Contracts for Salesforce) users. If you are a Conga CLM user and you are looking for information regarding defining template locale, see [Defining Template Locale](#).


Template localization is a feature that allows Template Administrators to define the locale of their templates. Locales can be system defaults or user-defined locales. You can define locale settings at the agreement template and field level. Following are some of the important points about how localization works:

- At the template 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 a template.
 - You can also change the locale of a template at check-in.
- At the template field level:
 - You can use the **Fields** tab to define locale for Number, Currency, Date, and Precision fields.
 - You can also use the **Fields** tab to define Currency Format, Date Format, Currency Precision, and Number Precision for fields.
- Field-level locale formatting takes precedence over template-level locale formatting.
- For a field, if locale formatting is not defined at field-level, the template formatting is applied.
- If an agreement template has no locale defined, the default locale—English (US) is applied.

To learn how to change field level locale, refer to [Changing Field Level Locale](#).

Supported Locales

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 Conga CLM (Contracts for Salesforce). You can configure custom locales in Conga CLM (Contracts for Salesforce).

 If a locale is deleted in Conga CLM (Contracts for Salesforce) 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 Conga CLM (Contracts for Salesforce) that is being used in a template at

the field level and you navigate to the Fields tab and view the field details, the Locale field is set to blank. If all the locales are deleted in Conga CLM (Contracts for Salesforce) and you click Create, a warning message is displayed and you need to add required locales.

Unsupported Locales

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 Templates](#)
- [Checking in a Template](#)

Changing Field Level Locale

When you create a new template, 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 for Contracts provides template administrators with the ability to define Number and Currency Precision, Currency Format, and Date Format.

Prerequisites

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

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

1. Open the template and log in to X-Author for Contracts.
2. In the Templates pane, go to **Work** and click **Fields**.
3. Click the gear icon (⚙️) next to the field name.
4. In the **Properties** page, based on the template field selected, you can view and change the following field properties:

- For date fields, you can change **Locale** and **Date Format** from their respective dropdown.
The Date Formats displayed are based on the Locale selected.
- 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 Conga CLM (Contracts for Salesforce) is displayed. You can change the Currency Precision value as per your requirement.
- 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 Conga CLM (Contracts for Salesforce) is displayed. You can change the Number Precision value as per your requirement.

FAQs

Can I cross-reference clauses in X-Author for Contracts?

Cross-referencing is an MS Word feature. Currently, X-Author for Contracts does not support cross-referencing.

X-Author for Contracts Features by Release

Review the latest X-Author for Contracts Features by Release document.

- [Features by Release](#)

Features by Release

This document contains an overview of features introduced in each major release of X-Author for Contracts. For more information, see [X-Author for Contracts Features by Release](#).

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