CLM (Contracts for Salesforce)

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CLM (Contracts for Salesforce) streamlines and accelerates contract negotiations so you can close deals faster — all without ever leaving Salesforce.

Release Notes

Discover what's new in the latest release of CLM (Contracts for Salesforce)

- Winter '20 Release Notes

Winter '20 Release Notes

CLM (Contracts for Salesforce) Winter '20 Release Notes

These Release Notes contain the following information about Conga CLM (Contracts for Salesforce) Winter '20 Release.

> For more information on new features, enhancements, and document improvements refer to
> - What's New in the Conga CLM (Contracts for Salesforce) 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 packages and dependent packages are required to upgrade to this release to utilize all the new features of 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 *(Version Name | Version Number)*
Conga CLM (Contracts for Salesforce)	2.38

System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using Conga CLM (Contracts for Salesforce).

System Requirement	Minimum Supported Version
Salesforce Edition	• Performance / Unlimited • Enterprise • Developer Salesforce® Products: • Sales Cloud • Service Cloud • Force.com / App Cloud • Health Cloud • Financial Services Cloud • Quote-to-Cash ⚠ Internet Explorer is no longer compatible with Conga Contracts for Salesforce's True-Up user interface in version 1.89 and subsequent versions.

System Requirement	Minimum Supported Version
Browser	- Google Chrome® - Mozilla Firefox® - See Mozilla getting started to ensure Salesforce works optimally with Firefox, update the browser's configuration settings. - See Supported browsers for Salesforce Classic. Salesforce Classic is supported with Microsoft® Internet Explorer® version 9, 10, and 11, and Apple® Safari® version 11.x on macOS. The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported. There are some limitations. - Supported browsers for the Lightning experience. See the supported browsers and limitations for Lightning Experience. - Recommendations and Requirements for all browsers. For the best experience and security, follow these guidelines. - For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017. - Some features use iframes to work in Lightning Experience, so you must have the appropriate browser security settings for iframes to load correctly. Follow your browser's instructions to enable working with iframes and third-party cookies. For example: In Internet Explorer, set the Launching programs and files in an IFRAME security setting to Enable orPrompt. In Safari, we recommend changing your privacy settings for cookies to Allow from websites I visit. In Chrome, make sure that Block third-party cookies and site data isn't selected in the Content settings. - The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.

System Requirement	Minimum Supported Version
	• For Mac OS users on Apple Safari or Chrome, make sure the system setting Show scroll bar is set to Always. • Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser's plug-ins and extensions and try again.
Template Software	• Microsoft Office® 2016 (Mac or PC) • Adobe Acrobat® XI, Acrobat Reader • Adobe LiveCycle PDFs are not supported.
Mobile	Compatible with Salesforce1 and all mobile browsers when configured following the documentation.

Upgrade Notes

To upgrade Conga CLM (Contracts for Salesforce), see Upgrading CLM (Conga Contracts for Salesforce).

New Features

The following features are new to Conga CLM (Contracts for Salesforce) in this release.

Generate Documents with X-Author for Contracts

• You can now integrate Conga CLM (Contracts for Salesforce) with Conga X-Author for Contracts for document generation. For more information, see Generating Documents for Conga Contracts for Salesforce with X-Author for Contracts

Enhancements

The following section describes existing features that are changed (or are no longer supported) in this release.

Send for Negotiation Compose Email

- When composing emails during the Send for Negotiation process, you can search for users in the "To:" field and hover over their names to display a popover that displays a user's name, email address, account, and title.
- System Administrators can now restrict the "To:" field to display only contacts who are on the account in Global Settings. This feature is disabled by default.

Document Locking

If a document is locked for editing by another user, you can now see the user's name next to a lock icon when you're in the View Redlines screen.

Resolved Issues

The following table lists the issues resolved in this release.

Conga Internal ID	Description
CFS-51 CFS-75	The name Conga Contracts was replaced with Conga CLM in the application to align with updated branding.
CFS-74	Removed the error message "The document can be stored in either Salesforce or the Conga Platform but not both locations at the same time." You can now update settings to store files in both locations.

Known Issues

There were no known issues for this release.

About Conga CLM (Contracts for Salesforce)

Conga CLM (Contracts for Salesforce) streamlines and accelerates contract negotiations so you can close deals faster — all without leaving Salesforce. With it you can send contracts directly from Salesforce, compare versions, sync data back to Salesforce, and keep a complete contract history.

Built for Salesforce Lightning (but compatible with Classic), Conga CLM (Contracts for Salesforce) allows users to track and compare document changes without the use of a heavier Contract Lifecycle Management (CLM) application. Making Salesforce your central repository also creates an audit trail with visibility and a streamlined negotiation process. With Conga CLM (Contracts for Salesforce) you can create and manage quotes, work orders, statements of work, non-disclosure agreements (NDA), master service agreements (MSA), terms and conditions, payment terms and service license agreements (SLA).

CLM (Conga Contracts for Salesforce) Conga Contracts allows you to perform the following tasks:

- Install and Upgrade Conga CLM (Contracts for Salesforce)
    - Configure Permissions and Licenses
    - Add Buttons
    - Add to Layouts
    - Use Automatic Configurator
- Configure the Clause Library
    - Create Clause Types, Clause Bundles, and Clauses
    - Manage Clauses
- Document Generation with Conga Composer
    - Add clauses from the Conga Composer Clause Library
    - Generate documents
    - Send for Negotiation using Microsoft Word.
    - Negotiate documents through email using Microsoft Word.
    - True-Up data by syncing back to Salesforce
    - Deliver final documents according to the specified delivery method (for example, eSignature)
- Document Generation with Salesforce CPQ
    - Add quote terms from the Salesforce CPQ Clause Library
    - Generate documents and Document type.
    - Send for Negotiation using Microsoft Word.

- Negotiate document through email
- True-Up data by syncing back to Salesforce.
- Deliver final document according to the specified delivery method (for example, eSignature)
- Document Generation with X-Author for Contracts
  - Add clauses from the clause library
  - Generate documents
  - Deliver final documents according to the specified delivery method (for example, eSignature)

What's New in the Conga CLM (Contracts for Salesforce) Guide

Document	Topic	Description
Winter 2020	Generating Documents for CLM (Conga Contracts for Salesforce) with X-Author for Contracts	New Topic
	Configuring Conga Contracts for Salesforce for use with X-Author for Contracts	New Topic
	Configuring Business Objects for Use with X-Author for Contracts	New Topic
	Managing X-Author for Contracts Templates	New Topic

CLM (Contracts for Salesforce) for Users

Select one of the following topics for more information:

- Creating a CLM (Conga Contracts for Salesforce) Word Template
- Redlining and True-Up features
- Viewing comments in Negotiate Mode
- Changing a Document Name
- Capture mode
- Third-Party Contracts
- Reporting on CLM (Conga Contracts for Salesforce)
- Troubleshooting CLM (Conga Contracts for Salesforce)
- Contextual Help

Creating a CLM (Conga Contracts for Salesforce) Word Template

The functionality discussed in this documentation requires active Conga Composer and Conga Contracts for Salesforce subscriptions.

Create a Contract document using Conga Contracts for Salesforce and Conga Composer. This requires the implementation of https://developer.salesforce.com/docs/atlas.en-us.soql_sosl.meta/soql_sosl/sforce_api_calls_soql.htm, a Conga Composer button, and a Composer Word Template. The generated Contract document can be emailed and sent for negotiation with Conga Contracts for Salesforce.

After you have successfully integrated Clauses, Managed Clauses, and Clause Bundles with your Contract or alternative object, follow the steps below to build a solution that generates a Contract document. For more information on creating and structuring Clauses for a Contract document, see Creating Clauses for Conga Contracts Documents.

Create a Composer Button

Build a Conga Composer OAuth Button on the object where managed Clauses are referenced. Ensure that the Conga Composer button is placed on the object layout. For specific instructions on creating a Conga Composer button for Conga Contracts for Salesforce, see Create Composer Button To Generate Document for Conga Contracts and Create a Conga Composer OAuth Button.

Create SOQL Queries to Retrieve Managed Clause Data

Create a Conga Query record to retrieve Managed Clause data from your object. The syntax will be very similar to the example SOQL Query shown below aside from the listed variables.

Example SOQL Query Syntax: `SELECT Id, APXT_Redlining__Latest_Revision_Text__c, APXT_Redlining__Order__cFROM APXT_Redlining__Managed_Clause__cWHERE Parent_Contract__r.ID = '{pv0}'AND APXT_Redlining__Clause_Type__c = 'Definitions'ORDER BY APXT_Redlining__Order__c ASC`

Copy and paste the syntax above into the Conga Query record and account for the variables. Note, it is recommended to create individual Conga Query records for each Clause Type. This allows you to have separate data sets for each Clause Type in the Contract template and output document.

Variables for Managed Clause Queries

- Reference the Managed Clause's Text field or Rich Text field.
- The APXT_Redlining__Latest_Revision_Text__c field pulls in clause data from the Latest Revision Text field. This field does not include rich text formatting because it is not a rich text field. It is recommended to use the APXT_Redlining__Text_Rich__c field to render rich text formattings such as numbering, bullet points, italics font, and bold font. If you plan to use and merge rich text formatting with Managed Clauses, ensure that you reference the Latest Revision Text (Rich) field in the SOQL Query. It is not necessary to reference both Managed Clause fields in the SOQL query; only reference the text or rich text field depending on whether or not you are using the rich text field.
- Change the referenced Object ID in the WHERE Statement.
- On the third line of the example SOQL query, the Object ID field is also a variable. In the example above, this is the correct syntax for obtaining Managed Clause data that is related to the standard Contract object. If you are retrieving Managed Clause data related to an Opportunity the proper syntax is Parent_Opportunity__r.id. Ensure that correct object ID is accounted for in the SOQL Query.
- Filter the SOQL query by Clause Type.
- As previously mentioned, it is recommended to create an individual SOQL query for each Clause Type to provide easy categorization within the Contract template and output document. On the fourth line of the example SOQL query,

replace 'Definitions' with the value of each Clause Type referenced your Managed Clauses.
- See the portions of SOQL syntax below for an example of a Clause Bundle that has three Clause Types. Each example representative of an individual SOQL filtered by a specific Clause Type value.
    - AND APXT_Redlining__Clause_Type__c = 'Legal'
    - AND APXT_Redlining__Clause_Type__c = 'Fiscal'
    - AND APXT_Redlining__Clause_Type__c = 'Procurement'

Once the Conga Query records are created to retrieve the Managed Clauses, add the Conga Queries to your Conga Composer button using the QueryID parameter. This allows the Conga Composer button to retrieve the Managed Clauses datasets and successfully merge it with a Conga Composer Template.

Create a Word Template

After adding the QueryID parameter to the Conga Composer button, Conga Composer's Template Builder user interface allows you to access the Managed Clauses merge fields.

To build a Conga Composer Word Template for a Contracts document:

1. Launch the Conga Composer button located on a Contract record or custom object record.
2. In the Composer user interface, click Tools and Settings and then select Template Builder.
3. Click the + button next to a Managed Clause dataset to expand the available merge fields.
    - The alias assigned to the ID of each Query in the QueryID parameter determines the name of the dataset.
        - Example: &QueryId=[DefClause]a03460000093Njb, [PayClause]a03460000093Njc creates two datasets availabe in the Template builder named DefClause and PayClause.
4. Select the APXT_REDLINING_MANAGED_CLAUSE_LATEST_REVISION_TEST field or APXT_REDLINING_MANAGED_CLAUSE_TEXT_RICH field and use the right directional arrow to bring move it over to the right hand column.
5. Copy the merge field syntax into the Word Document.
    - The merge field syntax will appear as {{TableStart:yourqueryalias}} {{APXT_REDLINING__MANAGED_CLAUSE_TEXT_RICH}} {{TableEnd:yourqueryalias}} or {{TableStart:yourqueryalias}} {{APXT_REDLINING__MANAGED_CLAUSE_LATEST_REVISION_TEXT}} {{TableEnd:yourqueryalias}}
    - Each Managed Clause dataset requires a unique TableStart and TableEnd value based on the alias assigned to the Query ID in the Conga Composer button URL. The merge field in the Word

document must be referenced in between the TableStart and TableEnd. For more information, see Repeating Data in Word.

6. Preview or Merge and Download the Word the template using the Local Template tab in the Conga Composer user interface. Ensure data successfully merges into the output Contract document

7. After testing the merge fields, create a Conga Template record and attach the Word template. Associate the Conga Template record to the Conga Composer button using the TemplateID parameter.

Formatting in a Contract Word Template

Numbering and Hierarchical categorization is a recommended method to organize and merge Clause data in a Contract document's Word template. See the points below for tips and recommendations to best implement numbering and hierarchical categorization.I f hierarchical numbering or bullets are required within individual Clauses, format in the Clause's rich text field. The rich text field formatting renders successfully in the Word Template when using the HTML Word Function.

Redlining and True-Up features

You can view redlines (edits from the last version underlined in red in a document) and True-up the relevant updates in a document so that you understand where updates were made and add the relevant updates to Salesforce. You can view all of the merged Salesforce data in the document being negotiated and see what data is in-sync with Salesforce and what data is not. This way, you can ensure all of your updates went through the True-up process successfully.

How do Redlining (viewing differences or updates) and True-Up (adding the latest version to Salesforce) work?

You can view redlines (edits from the last version underlined in red in a document) and True-Up the relevant updates in a document so that you understand where updates were made and add the relevant updates to Salesforce. You can view all of the merged Salesforce data in the document being negotiated and see what data is in-sync with Salesforce and what data is not. This way, you can ensure all of your updates went through the True-Up process successfully.

To view redlines and True-Up data:

Click View redlines to enter document comparison mode. This displays all of the redlines between two selectable document versions. You can select either Negotiate or True-Up depending on the action you want to take.

If you select Negotiate, the assumption is that you are sending another version back to your counterparty for further negotiation. When you have reviewed all redlines and updates to the document, click Save and a new file version is added to Salesforce and downloaded to your desktop. When the negotiation is complete and you are ready to synchronize your data from the latest version of the document to Salesforce, you must True-Up.

When entering True-Up mode the File Version selection is locked. The redlining user interface displays the True-up actions as pop-over cards that hover above the document view and point to the redline where you use True-Up to sync your data. You can click Save or Save & Continue which automatically navigates to the next redline that needs attention and automatically scrolls the document view.

You can use the tree view on the left side of the user interface to show all of the Salesforce data within the document in a hierarchical view. The parent nodes of the tree view are represented by either Object Name, Clause, or Unidentified Change. Any unidentified changes are sections that contain redlines that do not map to Salesforce data.

The Open In Word function allows users to create a Word document from the view redlines user interface which displays redlines from the two selected file versions. Users can make additional edits in the Word document and then sync the changes into Salesforce by saving in Word.

In addition to the Negotiate, True-Up, and Open in Word features, you can also select Save PDF to save a new PDF file on the master record in Salesforce. The dropdown option next to the Save PDF button allows you to Save and Download the PDF file. The Save and Download feature simultaneously downloads a PDF file and saves a new PDF file to the object record.

If there is an existing Salesforce File comparing the same File versions, the Save PDF button (and the related Save and Save and Download button) only downloads a PDF file and does not create a duplicate Salesforce File on the master record.

The generated PDF file's name contains both versions of the files being compared for full visibility. The downloaded PDF file also includes a dynamic cover letter detailing the date and time of the file generation, the user who generated the file, file name, and both document versions being compared.

The following illegal characters are automatically removed from PDF file names for more secure file generation:@ # $ % ^ & * ( ) , . ? " : | < >

What is True-Up All?

The True-Up All feature allows you to accept and sync all negotiated changes to a contract at once, rather than approve them one by one. See Redlining and True-Up features for more information on True-Up.

True-Up suggestive service

You do not need to manually select text in the document.

Contracts for Salesforce can capture your interaction with the True-Up card and feed that information back into a machine learning service in order to improve the accuracy of suggestions over time. You can pick a suggested field and save the selection. You can skip True-up at any time or select another field in the manual selector.

How to Enable True-Up All

If you are an existing customer, you must enable True-Up All in the Custom Settings > Conga General Settings. For existing records, Salesforce will always default this setting to false.

To enable True-Up All, take the following steps

1. Navigate to Setup in Salesforce by clicking the Setup Geat wheel icon.
2. Type in "Custom Settings" in the Quick Find sarch box and click Custom Settings.
3. Click Conga General Settings.
4. Click Manage.
5. Click New.
6. Set Enable True-Up field to True.
7. Click Save.

True-Up All is now enabled in Contracts for Salesforce.

How to Disable True-Up All

Button Code	Action
`{!URLFOR($Action.Contract.APXT_Redlining__View_Redlines, null, [altId=Contract.Id, disableOpenInWord=true, disableNegotiate=true, disableTrueUp=true, disableSavePdf=true, enableRecursiveMergeSync=true], false)}`	This button code disables True-Up and True-Up All.
`{!URLFOR($Action.Contract.APXT_Redlining__View_Redlines, null, [altId=Contract.Id, disableOpenInWord=true, disableNegotiate=true, disableTrueUpAll=true, disableSavePdf=true, enableRecursiveMergeSync=true], false)}`	This button code enables True-Up but disables True-Up All.

How to use True-Up All

After you've created a contract and completed the negotiation process, you can True-Up All your changes.

To use True-Up All

1. In Salesforce, navigate to your contract and click on View Redlines.
2. Click on the True-Up drop-down menu and select True-Up All.
3. When the True-Up All scan is complete, click Done. A confirmation message displays: All True-Up changes complete.

Headers and Footers and True-Up

The True-Up feature and functionality are not supported in headers or footers of contracts. If the content is located in the headers or footers of documents, True-Up does not work.

Save PDF Feature in View Redlines

The Save PDF feature in the View Redlines user interface allows users to save and download a PDF file that displays redlines (proposed changes) between two versions of a

Contracts for Salesforce document. The generated PDF document with the visible redlines becomes accessible in Salesforce or locally on a user's machine.

Navigate to the View Redlines user interface in Salesforce and click the Save PDF button to save a PDF file with redlines to the object record related to Contracts for Salesforce File.

Click the dropdown next to Save PDF to access the Save and Download and Save features. The Save and Download feature simultaneously saves the Contracts for Salesforce document as a File on the master object record and downloads a PDF to the user's machine.

The Save feature is similar to the parent Save PDF feature and simply saves a new PDF file to the master object record.I f a user already created and saved a PDF file with Save PDF functionality and attempts to generate a PDF comparing the same two Contracts for Salesforce File versions with Save PDF functionality, the PDF file does not generate, and a pop-up message appears warning the user that the File already exists. This prevents users from saving duplicate Salesforce Files on the master object record.

The pop-up message only appears when users attempt to use the Save or Save PDF with the two File versions that already have a corresponding PDF generated with Save or Save PDF. The generated PDF's file name conveniently includes the specific version numbers of the Contract for Salesforce File that are being compared in addition to the File's original name. The new PDF file also includes a cover letter that displays the file name, version numbers that are being compared, the name of the user that generated the PDF file, and file generation date and time.

Open in Word Feature in View Redlines

Use the *Open in Word* feature in the View Redlines user interface to edit a Conga Contracts document within Microsoft Word. This allows users to work in the Microsoft Word application as opposed to the View Redlines user interface in Salesforce.

To use the Open in Word feature:

1. Click the View Redlines button on your Salesforce object to access the View Redlines user interface.
2. Click the Open in Word button in the View Redlines user interface.
   - This prompts the Editing Latest pop-up in Salesforce. Do not click Continue until all document edits are made in Word.
   - If your operating system prompts you to select an application, choose Microsoft Office or Microsoft Word.
3. Make any desired document edits and changes in Microsoft Word.
4. Click the Save icon in Word once all edits and changed are made.

5. Close the Word document.
6. Click the Continue button on the Editing Latest pop-up in Salesforce.
7. The edits and changes made in Microsoft Word are now reflected as redlines in the View Redlines user interface. Use the Negotiate or True-Up features to proceed with the Contract negotiation process.

Viewing comments in Negotiate Mode

Viewing comments in Microsoft Word documents

When you are in Negotiate Mode in Conga Contracts for Salesforce, you can view comments made in the Word document. Comments are located in the original space where they were initially created on the document. Comments are located on the right-hand side column in the order they were created.

You see the total number of comments at the top of the document. As you scroll through the document, comments appear and the corresponding number is located at the top of the document.

Changing a Document Name

Conga Contracts for Salesforce now allows users to change a document name during the Send for Negotiation process without creating multiple copies of the same document. Previously during this process, if a user downloaded a document and changed the name (for example, changing the name from LegalDocument to LegalDocument_Comments), multiple copies of the document were created. With this new functionality, a unique ID in the company's metadeta allows a user to change the document name, and the same copy of the document is used throughout the negotiation process.

To enable Document Name Change functionality, take the following steps:

1. From the Salesforce App Launcher, go to Conga Contracts.
2. Click on Conga Contracts Setup.
3. Under Document Renaming, click the toggle to Enable. This setting is on Disabled by default.

Once enabled, a unique ID is added to the metadata of the document that the system uses to identify the document which allows users to change the name without creating another version of the document.

> ⬣ **CAUTION**
>
> Email spam filters could potentially strip out the metadata within your document.

Capture mode

What is Capture mode?

In Contracts for Salesforce, you can send a CPQ generated document for negotiation and use True-Up to add the data within the document that is redlined (lines in the document that were changed). The Capture feature adds your CPQ document updates to Salesforce.

Once a negotiation is complete and you are ready to True-Up Salesforce, the document contains Contracts metadata (bookends) so that Contracts for Salesforce can accurately save data to the correct Salesforce fields, clauses, or quote terms. The metadata injector compares the document that is being sent to the related Document Type and inserts metadata (bookends) into the document during the Send for Negotiation process. The captured sample document is saved to the Document Type record so that the Contracts application can access all Send for Negotiation events that specify that Document Type.

The Document Type object needs to be created by a user accessing Capture Mode to map all of the Salesforce data in a sample document. Document Type is a new object included in the Contracts for Salesforce managed package. Document Types are used to create templates for non-Composer generated documents that you want to negotiate using Contracts for Salesforce.

If you are using the True-Up mode, and the application does not show redlines (edits in the document) as a Salesforce field that needs to be updated, you can manually select text within the document and map it to a Salesforce field so that it can save data from the document to that field. You can capture dates in clauses and CPQ quote terms as well.

The Capture button is accessed from the Document Type page layout page. Capture mode is used to create document types which are data tags (bookends). Document types are tags for text that need to be added to the Document Type record in Salesforce. Capture features are required if you are using documents not generated with Conga Composer. For example, if you are using CPQ generated documents or contracts outside of Composer, you are required to use the Capture feature to add metadata to your document that can be added to Salesforce.

For instructions on how to use Document Types and Capture mode, see: Using Document Types with Non-Composer Generated Documents or Using Capture Mode

How do I Capture data?

You can upload a sample document, highlight text, and map the text to Salesforce. Contracts for Salesforce then save a metadata template to the Document Type record which the bookend injector uses when inserting data tags into non-Composer documents. Adding bookends in documents ensures that you can True-Up your document changes at the end of the negotiation process.

RECOMMENDED: Use the Capture feature for every Document Type for each document being sent for negotiation and any variation of a document.

If you are in True-Up mode, the One-off Capture feature is used. One-off Capture mode allows you to highlight text in the document, select the Salesforce field or clause that the text is mapped to and True-Up the data. This feature is useful when data tags (bookends) are compromised or missing from the document.

Using Capture mode

In Contracts for Salesforce, you can send a CPQ generated document for negotiation and use True-Up to add the data within the document that is redlined (lines in the document that were changed). The Capture feature adds your CPQ document updates to Salesforce. For more information about the feature, see Capture mode.

This scenario assumes you want to create a new Document Type and you know what object clause types to use.

To use Capture mode:

1. Navigate to the Document Type tab.
2. Click New.
3. Enter a Document Type Name.
4. The Target Object Name should be the name of the object where the document is stored. For example, select SBQQ__Quote__c for CPQ documents.
5. Select a Clause Type. For example, CPQ Quote Terms if you are working with CPQ or Conga Clause Library if you are working with Contracts Business CLM Edition or higher.
6. Click Save.
7. Upload your non-Composer document.

8. Click Capture.
9. Highlight the text of the object in the document. For example, highlight the Quote Term and click Add and Save. For example:

A new file was created on the Document Type tab. If you open the new document, you should see that bookends were added.

To use Capture mode and True-Up:

This scenario assumes you are working with a Composer generated document with contract controls enabled and text was added by a different administrator or another client. The new text needs to be added to Salesforce.

1. Open the new version of the document that includes the updated text and click True-Up.
2. A new Pop-up window appears and suggests options to be selected related to the new text, for example, the Pop-up window might suggest a new clause or contract term.
3. For this example, Select New clause, name the clause and click Save.
4. Click True-Up. Create a new managed clause on the contract master record.
5. Navigate back to the appropriate contract org. You should see the new clause text that was added in the Latest revision text (Rich) field on the record.

To use Capture mode with third-party documents:

This scenario assumes you have a document but it has been replaced with another document from a third-party. You might want to store the document in Contracts for Salesforce only or reuse the new document later.

1. If you want to store the new document, select True Up. If you want to reuse the document, create a new Document Type. To create a new Document Type, see the instruction on how to use Capture mode.
2. You must create a new Document Type and Capture the terms you might want to reuse later.
3. Click View Redlines and make your selections in the Pop-up window and Save.

Third-Party Contracts

You might negotiate contracts on your customer's documents and need to reconcile the contract terms to Salesforce. These third-party documents can be stored in Salesforce and

Contracts for Salesforce. You can identify clauses in third-party contracts and save them to your contract lifecycle management (CLM) system to track non-standard clauses in agreements. You can identify terms in third-party documents that you track in your Salesforce org and update Salesforce fields like Payment Terms or Expiration Date using True-up throughout the negotiation process.

Third-party documents can be added to in two ways:

1. You send your standard sales contract to a client through email using the Send for Negotiation feature. The client replies to that email with the client's document. The Contracts email service automatically uploads a new File to the master record in Salesforce. If you wait for an email response from a client, you must manually upload the customer's contract to the master record in Salesforce as a File.

2. When negotiating on Third-party documents through email, using the Send for Negotiation feature, the Contracts for Salesforce email service automatically adds file versions to Salesforce as emails go back and forth between users. The Redlining feature can compare two selected versions of a third-party document and display the differences as redlines.

When you are done negotiating your contract, you can True-Up Salesforce with the most recent version of the contract. You can use the Capture feature (which manually highlights text and adds metadata) to select the data that maps to a Salesforce field and which clauses you want to save as Managed Clauses in the Salesforce Clause Library.

Reporting on CLM (Conga Contracts for Salesforce)

Information about pre-defined reports and dashboards available for Contracts for Salesforce customers.

Select one of the following topics for more information:

- Creating Custom Report Types for Conga Contracts for Salesforce
- Creating a Frequency of Clause Revision Report
- Creating an Inventory of Non-standard Clauses Report

Creating Custom Report Types for Conga Contracts for Salesforce

For additional Contracts reporting, you must create custom report types and select Contracts for Salesforce objects as your Primary object.

To create a custom report type

1. From Salesforce Setup, find Report Types. Click New Custom Report Type.
2. Select the Primary Object for your custom report type (such as Managed Clauses).
3. Enter the Report Type Label and the Report Type Name.
4. Enter a description.
5. Select the category in which you want to store the custom report type.
6. Select a Deployment Status (such as Deployed).
7. Click Next.
8. (Optional) Click to relate the primary object to another object (such as Managed Clause Revisions).
9. When you are done, click Save.

Creating a Frequency of Clause Revision Report

Reporting on the frequency of clause revisions requires a custom report type.

To create a frequency of clause revision report, follow these steps

1. Build a custom report type and select Managed Clauses as the Primary Object and Managed Clause Revisions as the Related Object.
2. Create a new report of this custom type and make it a summary report.
3. Drag the Field on which you want to group onto the report (such as Clause).
4. Save your report in the Contracts for Salesforce Report folder.
5. (Optional) Add the chart to your Contracts Dashboard:
   a. Navigate to Dashboards.
   b. Click Edit.
   c. Add the Component you want (such as a Donut Chart).

d. Drag the custom report you created onto the Component.

e. Click Save.

Creating an Inventory of Non-standard Clauses Report

To create your own clause revision frequency report

1. Build a custom report type and select Managed Clauses as the Primary Object and Managed Clause Revisions as the Related Object.
2. Create a new report of this custom type and make it a summary report.
3. Drag the Field on which you want to group onto the report (such as Clause).
4. Save your report in the Contracts for Salesforce Report folder.
5. (Optional) Add the chart to your Contracts Dashboard:
6. Navigate to Dashboards.
7. Click Edit.
8. Add the Component you want (such as a Donut Chart).
9. Drag the custom report you created onto the Component.
10. Click Save.

Troubleshooting CLM (Conga Contracts for Salesforce)

You can resolve issues by troubleshooting known problems. See the following troubleshooting sections for details on known issues:

- Allow Output Format Change for Salesforce CPQ
- Cannot open Word document for editing in Conga Contracts for Salesforce
- Clause Bundle Selection is not Supported on this Object
- Error message related to sub clauses
- Insufficient Privileges error when accessing a Salesforce File
- Issues connecting to EU and APAC
- Redlining is only available to Conga Contracts customers error
- Troubleshooting tips and tricks
- Upgrading to version 1.65.1 Contracts for Salesforce duplicate Alternate Clauses buttons
- Validation null value error

- Variable does not exist or No such column
- View Redlines and Send for Negotiation errors related to OAuth
- Conga Contracts for Salesforce IP Address Changes
- Unable to deploy to Production after upgrading Contracts for Salesforce
- Export failing when using the Migration Utility Tool

Allow Output Format Change for Salesforce CPQ

In order for Contracts for Salesforce to work when using Salesforce CPQ as the document generation engine, you must enable the ability to save as a Microsoft Word document.

1. Click Setup > Setup > Users > Users.
2. Select name of user.
3. Click Edit.
4. In the Additional Information box, select Allow Output Format Change.
5. Click Save.

Cannot open Word document for editing in Conga Contracts for Salesforce

CAUSE

When trying to open the latest version of a Word document using the Open in Word button on the View Redlines screen, the document does not open.

WORKAROUND

To fix the issue:

1. Ensure all Microsoft Office applications are closed.
2. Go to Control Panel > Programs & Features > Microsoft Office > version (for example: Microsoft Office 2016, Microsoft Office 365).
3. Above the list of programs you should see options to Uninstall and Change. Click Change.
4. Select Quick Repair.
5. Click Repair.
6. When the procedure completes, close the window.

You should now be able to open Microsoft Office documents with Contracts for Salesforce when Redlining documents.

Clause Bundle Selection is not Supported on this Object

Cause

The Automatic Configuration creates the foreign key on the Clause Library's Master Object without field-level security. It is not visible to any profile. Therefore, the "Select Clause Bundle" user interface will give the "Clause Bundle selection is not supported on this object" error when trying to populate Managed Clauses on the master object. For the Select Contract Template process to work, the field must be visible to the correct profiles.

Workaround

1. Navigate to Setup > Create > Objects > Your Master Object > Managed Clause .
2. In the Custom Fields and Relationships box, Click Contract.
3. Click Set Field-Level Security.
4. Select Visible for all of the necessary Profiles.
5. Click Save.

Error message related to sub clauses

Issue

You might see the following error message when you select Select Clause Bundle: You do not have permissions for required field[s] of Sub Clause:

APXT Redlining SubClause c.APXT Redlining Sort Order c

Workaround

To resolve the issue, enable field level security on the Sort Order and Sub Clause field on the Sub Clause custom object.

Insufficient Privileges error when accessing a Salesforce File

Issue

If a user's Contracts for Salesforce license expires and the PlatformContentHandler Apex class is present in the Org, users are unable to download any File within their Salesforce Org.

Workaround

To resolve the issue of not being able to access Salesforce Files, the user needs to delete the Apex class if the subscription was discontinued.

If you do not want to cancel the subscription, have not paid the invoice, or the license expiring was an oversight, please contact your Account Manager or Customer Support to update your subscription expiration date.

Issues connecting to EU and APAC

If you encounter issues connecting the United States (US), European Union (EU), and Asia-Pacific (APAC) production instances, the first troubleshooting step should be to check whether the remote site for na1, eu1 or ap1 is active and enabled.
If you are having trouble connecting to the EU or APAC, navigate to Salesforce
Setup > Security Controls > Remote Site Settings, and ensure that the following sites are included and active:

- https://eu1.congacontracts.com

- https://ap1.congacontracts.com

- https://na1.congacontracts.com

For more information, see Connecting Contracts to EU databases.

Redlining is only available to Conga Contracts customers error

Issue

Users with Conga Enterprise receive the following error after generating a contract when the DS7 parameter is set to 111: Redlining is only available to Conga Contracts customers. You either do not have the CC app installed or are not a licensed user of it.

Workaround

A recent Salesforce update requires users to manually assign custom setting definitions. To assign these permissions, which will fix the issue, take the following steps:

1. Create a permissions set.
2. Go to Custom Setting Definitions.
3. Add the custom settings APXT_Redlining. Conga Api Settings and APXT_Redlining.Conga General Settings.

4. Assign the permission set to the non-admin users.

> ⚠ Contracts for Salesforce will add these permissions to the Permission Sets in a later release.

Troubleshooting tips and tricks

Issues

Q. Why can't I send an email?

A.There could be a variation of issues but we recommend trying these actions:

- Ensure the subject line is populated.
- Ensure that the remote server is not down.Q. Why did my email send but it was not saved?

This section will describe the problem or problems, why they apply and the way to solve or to workaround the problem.

Error: [error ID and description]

Section to describe the full error description.

Cause

Section to describe the causes of the problem.

Workaround

Section to describe the solution of the problem.

Upgrading to version 1.65.1 Contracts for Salesforce duplicate Alternate Clauses buttons

Issue

Why are there two buttons labeled Alternate Clauses on in Salesforce?

If you upgraded Contracts for Salesforce for Salesforce from version 1.61 to 1.65.1, you see two buttons labeled Alternate Clauses. You want to select the first button on in your Page Layout. You can verify you are using the correct button when the Clause related to alternated clauses is automatically populated in the Clause drop-down on your page layout. If you select the other button, Alternate Clauses is automatically populated.

Workarounds

You want to select the first button on in your Page Layout. You can verify your using the correct button when the Clause related to alternated clauses is automatically populated in the Clause drop-down on your page layout. If you select the other button, Alternate Clauses is automatically populated.

Validation null value error

Issue

If you are upgrading from a previous version of Contracts for Salesforce, you see the following error when you try to True-Up a Managed Clause to a null value:

Something bad happened Latest Revision Text: Clause text is required.

Causes

The latest version of Contracts for Salesforce removed the validation rule.

Workarounds

Navigate to the Salesforce Setup page > Objects. Locate Managed Clause and disable the Require_Text validation rule.

Variable does not exist or No such column

Issue

When installing Contracts for Salesforce, you receive a string of error messages including Variable does not exist and/or No such column.

Workaround

This issue is likely caused when a Salesforce org is upgraded from a lower tier to the Enterprise Edition. To resolve this error you will need to contact Salesforce. A Tier III Support Agent will run an upgrade script to fix the backend configuration of your org.

Variable does not exist error

1. Variable does not exist: apxt_tst_generateData
   apxt_tst_contentDocumentLink: Variable does not exist: apxt_tst_generateData
2. Variable does not exist: apxt_tst_generateData
   apxt_tst_contentDocumentTrigger: Variable does not exist: apxt_tst_generateData
3. Variable does not exist: apxt_tst_generateData
   apxt_tst_contractStatus: Variable does not exist: apxt_tst_generateData

4. No such column 'ContentLocation' on entity 'ContentVersion'. If you are attempting to use a custom field, be sure to append the '__c' after the custom field name. Please reference your WSDL or the describe call for the appropriate names. apxt_tst_generateData: No such column 'ContentLocation' on entity 'ContentVersion'. If you are attempting to use a custom field, be sure to append the '__c' after the custom field name. Please reference your WSDL or the describe call for the appropriate names.

5. Variable does not exist: apxt_tst_generateData apxt_tst_herokuConnect: Variable does not exist: apxt_tst_generateData

6. Variable does not exist: apxt_tst_generateData apxt_tst_selectPrimaryDoc: Variable does not exist: apxt_tst_generateData

7. Variable does not exist: apxt_tst_generateData

View Redlines and Send for Negotiation errors related to OAuth

Issue

You see an error if you click View Redlines or Send for Negotiation in Contracts for Salesforce for Salesforce. You might see the following errors: Unable to compare selected documents or Your email message was not sent.

Causes

The maximum number of OAuth authorization sessions was reached. Users can have no more than four OAuth authorization sessions working in a given environment. When a fifth session is kicked off, the first OAuth session is revoked.

It is also possible that the user who initiated the OAuth session was removed from the system.

Conga Contracts for Salesforce IP Address Changes

Conga Contracts for Salesforce is migrating its backend application on May 2nd, 2020. IP addresses will change as a result of this. If your org whitelists the current IP addresses, you will need to update before May 2nd in order to keep using the backend functionality of the application. If you are not whitelisting these IPs, then no changes are necessary.

The following is a list of current IP address and what the new IP address will be as of May 2nd:

Asia Pacific IP Address Changes

Current	New
13.211.25.67	13.239.89.190
54.79.90.165	13.238.223.29
	3.106.1.210

EU IP Address Changes

Current	New
52.29.112.211	35.158.186.42
18.184.88.226	3.126.222.106
	54.93.34.24

NA IP Address Changes

Current	New
34.218.169.155	54.186.51.97
34.218.169.175	35.164.120.35
	44.229.80.206

⚠ These IP addresses are subject to change.

Unable to deploy to Production after upgrading Contracts for Salesforce

Issue

Clients are unable to deploy new code changes to Production after the Conga Contracts upgrade to version 2.22 for the Clause Library. This affects the custom unmanaged packed for Clause selections.
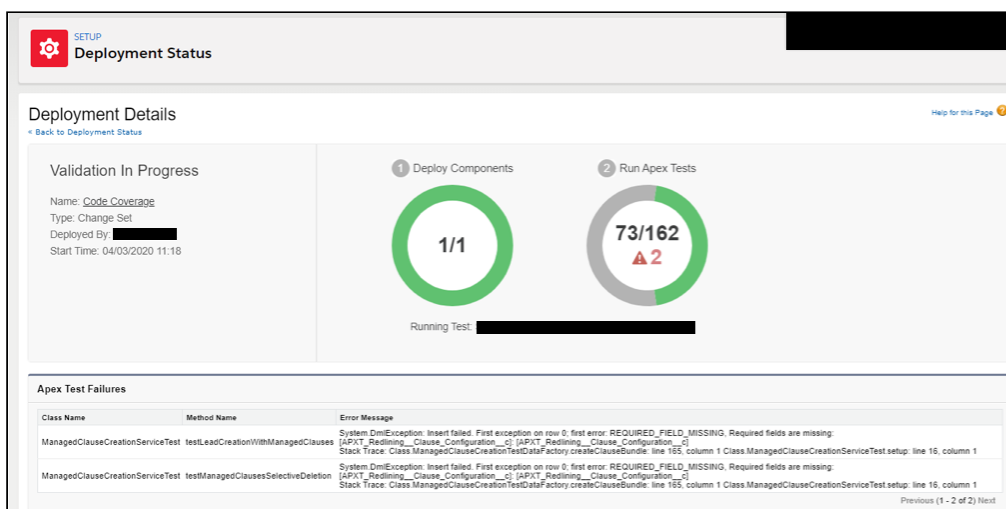
Steps to Resolve

Conga updated the files in the solution that create Bundle clauses to create and include a Clause Configuration value. To correct the error that occurs after the update, take the following steps:

1. For Apex Class: ManagedClauseCreationTestDataFactory: the create ClauseBundle method of the fix to go to line 145 add the following code to create a Clause Configuration record:

    a. ```
       //Create clause configuration APXT_Redlining__Clause_Configuration__c
       clauseConfiguration = new APXT_Redlining__Clause_Configuration__c();
       clauseConfiguration.APXT_Redlining__Clause__c = clauses[0].Id;
       clauseConfiguration.Name = 'Test'; insert clauseConfiguration;
       ```

2.  Then at line 166 (the creation of APXT_Redlining__Bundle_Clause__c records) add:

    a. ```
       APXT_Redlining__Clause_Configuration__c = clauseConfiguration.Id,
       ```

3. Add the updates to a Conga CFS Fix change set and push to Production.

> ⚠ When the changeset is pushed to Production there is the risk of new issues being found. We recommend Conga push to Production so we can iterate if other errors appear.

Export failing when using the Migration Utility Tool

Cause

As part of the new Migration Utility Tool feature, CLM (Contracts for Salesforce) introduced the new field APXT_Redline_External_Id_c to the following Clause Library objects:

- Clause Bundle
- Clause Type
- Clause Category
- Clause
- Bundled Clause
- Clause Configuration
- Sub Clause
- Alternate Clause
- Clause Approver
- Approval Step

Due to Salesforce limitations when using dynamic SOQL, the export function fails if there is a custom field called External_Id__c on any of these objects. The following Salesforce article references this issue: https://help.salesforce.com/articleView?id=000314137&type=1&mode=1

Workaround

To fix this issue, you must rename the field.

Contextual Help

Contracts for Salesforce has functions unique to Salesforce users. For more information, see topics for help.

Connect with OAuth

Contracts for Salesforce integrates with your Salesforce org using the login credentials of a user of your choice. The user should have sufficient permission for Contracts for Salesforce to modify records in Salesforce. While logged in as the selected user, click **Connect** and accept the OAuth prompt. When returned to the page you should see the status change from Not Connected to Connected. You can reconnect troubleshoot or change the connected user.

If the Connect or Reconnect option is not available, your current user does not have the required permissions to use Contracts for Salesforce.

Contract Page Layout

To use the functionality of Contracts for Salesforce some of the components must be visible on the Contract page layout. The package comes with a basic page layout that includes these components for organizations that have a light configuration or just want to easily try out Contracts for Salesforce.

For more complex organizations, you may wish to add these components to your existing page layouts. Where you position these components is up to the admins of your organization and will not affect functionality.

At minimum, the following buttons must be added to the page layout:

- View Redlines (APXT_Redlining__View_Redlines)
- Select Primary Document (APXT_Redlining__Select_Primary_Document)
- Send for Negotiation (APXT_Redlining__Send_for_Negotiation)
  It is also recommended to add the following custom field to the page layout:
- Primary Document (APXT_Redlining.Primary_Document__c)

For new organizations, we recommend using the Files related list instead of Notes & Attachments. Older organizations may wish to continue using Notes & Attachments if they have existing attachments. These orgs may enable Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments setting under Salesforce Files > General Settings to ensure future documents are attached as Files rather than attachments.

Finally, for Lightning experience users we recommend adding the Contract Activity Component to your Lightning page layout. This component comes with the APXT_Redlining package.

Email Message Layout

To use the functionality of Contracts for Salesforce some components must be visible on the contract page layout. Positioning of these components is up to the admin of your organization and will not affect functionality.

It is recommended that the following field is added to your Email Message page layouts:

Attached Contract Documents (APXT_Redlining__Attached_Contract_Documents__c)

Enhanced Email Configuration

Contracts for Salesforce uses Salesforce's Enhanced Email feature. Enhanced email must be enabled to use Contracts for Salesforce. Most organizations have Enhanced Email enabled by default.

History Tracking

To enable the full functionality of the Contract Activity component of Contracts for Salesforce, field history tracking is required on the Contract object and the following fields:

- Status (Status)
  Primary Document (APXT_Redlining__Primary_Document__c)

This feature will still function in a limited capacity without these fields.

Negotiation Templates

By default, Contracts for Salesforce Send for Negotiation functionality will allow users to select any Salesforce Email Template in the system. However, only some templates will be useful for Send for Negotiation. For orgs with a large number of existing email templates, we recommend filtering the list down to only those in specific Email Template Folder meant to be used with Contracts for Salesforce.

To do this, first create a new Email Template Folder for your Contracts for Salesforce email templates, then select it from the dropdown on the setup page (which controls the global setting for your org). If more granular configuration is needed, this setting can be modified for particular user or Profiles by going to the custom setting directly.

Nested mapping and ID fields

When you map objects from Contracts for Salesforce for Salesforce to another system like Contracts for Salesforce, you must map fields and nested fields. Fields and field values can have nested fields and values depending on the object and the direction you set the mapping from each system. Before you begin selecting objects and corresponding fields, ensure you know the relationship between objects in each system.

Object mapping

You can store documents created in Conga Contracts for Salesforce to Conga Contracts. Documents are stored on objects in Salesforce. These objects must be mapped from one system to another, allowing data to flow seamlessly to and from each system. You must map objects from Contracts for Salesforce to another system like Conga Contracts to the data is in sync. Ensure you know what objects must be linked in separate systems in order to establish a mapping connection.

Salesforce Files Configuration

Contracts for Salesforce uses Salesforce Files to store documents in Salesforce, which replaces the older Attachments object. Salesforce Files provide more robust features, such as versioning, which is required by Contracts for Salesforce.

Lightning experience users will always create Files instead of Attachments. However, users of Salesforce Classic may still be using Attachments when adding documents to records.

To remedy this, we recommend enabling the Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments setting under Salesforce Files > General Settings. This will ensure Salesforce Classic users create Files to prevent attaching documents that cannot be used with Contracts for Salesforce.

This setting is on by default in newly created Salesforce orgs.

User Permissions

Contracts for Salesforce connects to your Salesforce organization using the credentials of a user that you choose. It is therefore limited by the permissions granted by that user. The setup page will inspect the permissions of your user and provide a warning if any required permissions are missing.

A Permission Set is provided with the package that grants the required Field and Object permissions needed. If this is applied to all Contracts for Salesforce users, the required and recommended permissions will be satisfied.

You are not required to use the provided Permission Set or a System Administrator Profile if the permissions outlined below are granted to the necessary users.

System Permissions

- API Enabled
- View Setup
- Customize Application
- Tabs
- APXT_Redlining__Setup

Objects

- Contract (Read, Edit)
- EmailMessage (Create, Read)

Fields

- Contract.Contract_Family_Parent__c (Read, Edit)
- Contract.Contract_Family_Root__c (Read, Edit)
- Contract.Primary_Document_Title__c (Read, Edit)
- Contract.Primary_Document__c (Read, Edit)
- EmailMessage.Attached_Contract_Documents__c (Read, Edit)

Apex Classes

- APXT_Redlining__apxt_constants
- APXT_Redlining__apxt_emailMessageComplete

- APXT_Redlining__apxt_utilities
- APXT_Redlining__apxt_herokuConnect

Visualforce Pages

- APXT_Redlining__Apxt_herokuConnect

Additional System Permissions Recommended

- Modify All Data

Salesforce best practices for integration users also calls limiting the user with API only access. This can be accomplished by logging in as the user and connecting to Contracts for Salesforce before applying the API only configuration.

CLM (Contracts for Salesforce) Features by Release

Review the latest CLM (Contracts for Salesforce) Features by Release document.

- Features by Release

Features by Release

This document contains an overview of features introduced in each major release of CLM (Contracts for Salesforce). For more information, see CLM (Contracts for Salesforce) Features by Release.