Conga CLM

202409.1.0 Preview Release

Get early access to the latest features and improvements.

Table of Contents

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

CLM Release Notes

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

- 202409.1.0 Release Notes
- Preview Documentation for Next Release

202409.1.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the CLM 202409.1.0 release. For documentation updates, see What's New in CLM Documentation.

> This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your customer success manager (CSM) or account executive (AE) to discuss your specific features and licensing.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the Conga Learning Center.

System Requirements and Supported Platforms

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

New Features and Enhancements

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

Ability To Share Contract Record With User Groups

Users can share a contract record with individual users as well as user groups. They can also grant viewer or editor access on the contract record. For more information, see Sharing Records with Users and User Groups.

CongaSign Setup Page Modifications

ClientID and Secret fields are removed from CongaSign setup page in the Admin Console. The communication with Core Apps Sign APIs is through the user trust token instead of the app trust token. For more information, see Setting Up Conga Sign.

Document Generation Status in Contract Lifecycle Transition Bar

Administrators can configure workflow with an activity for automatic generation of contract documents and a stage to display the document generation status in the contract lifecycle transition bar on the contract details page. For more information, see Visibility into the Contract Lifecycle Stage.

Custom Action Button in Clause List Data Grid

Users can add custom action buttons in the data grid of the Clause List page by editing the metadata for `clauselist` page. For more information, see To add a custom action button in Clause List page.

View Settings Functionality for Clauses Tab

Users can control the columns displayed in the grid and save the filtered view of a record in the Clauses tab for contracts. They can set the saved filtered view as the default view to avoid reselecting the filters every time you open the grid (list) view. For more details, see Viewing Clause Details.

Accessing Copilot for Chat and Summarizing Supporting Documents

Users can now chat and generate summary for various types of documents including contract documents, supporting documents, global documents, and others. For more information, see Working with Conga Copilot.

Approval Status in Contract Lifecycle Transition Bar

Administrators must set up the initial submission, approval and rejection actions whenever an approval is initiated, accepted, or rejected. For more information, see Approvals Flows.

The workflow transitions to In Approvals stage in the contract lifecycle transition bar on the contract details page once the contract is initiated, the contract status category is updated to *In Authoring* and the status changes to *Language Approval*. The workflow transitions to In Signatures stage once the contract is approved, the contract status category is updated to *In Signatures* and the status changes to *Ready for Signatures*. For more information, see Visibility into the Contract Lifecycle Stage.

New Reports Introduced

The following new reports are added to Reports & Dashboards:

- Contract Cycle Time Report
- High Risk Contract Report
- High Value Contracts Due for Renewal

For more information, see Reports and Dashboards.

Rule Configuration for Custom Action Buttons

Users can configure rules on the custom action button in the page header to show or hide the custom button based on criteria. For more information, see To add a rule for a custom button

Workflow: Approvals Activity

Users can now access the approval activity for a contract through a workflow stage shown in the transition bar on the contract details page. From this workflow stage, they can preview and submit an approval process or override it. For more information, see Working with Workflow Activities.

Fixed Issues

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

Case Number	Conga Internal ID	Description
00903163	CONTRACTS-22762	The record type does not save in Platform after syncing from Salesforce CLM using Trigger and the clauses are not getting extracted during CCI review.

Known Issues

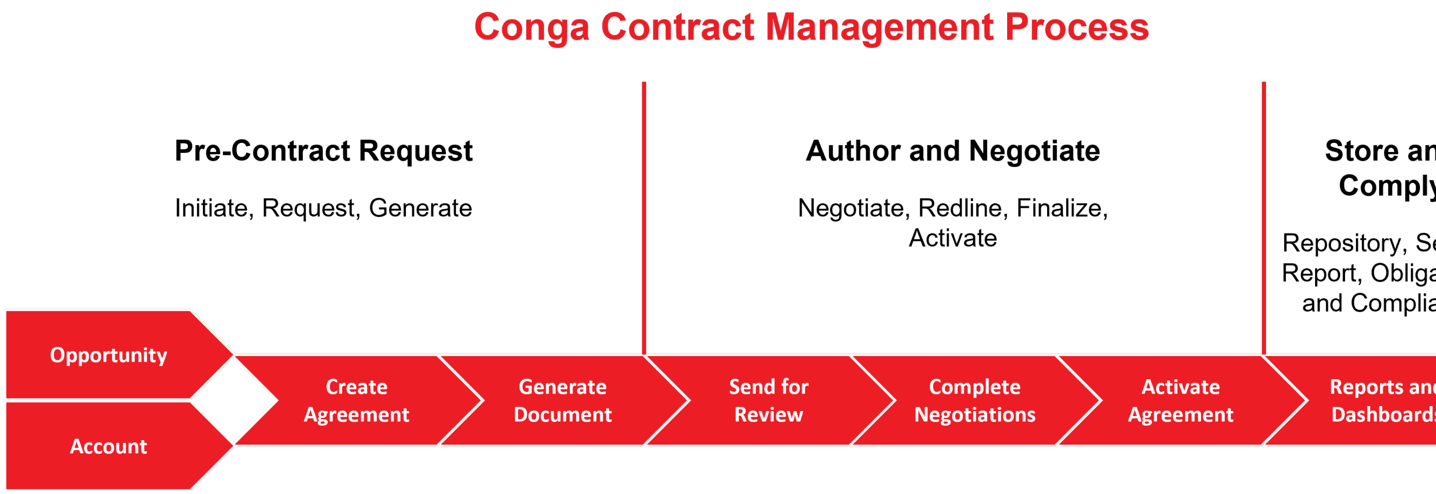
There are no known issues in this release.

DOC ID: CLMRLP202409.1.0RN20240930

About CLM

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

The following flowchart depicts the Contract Management process:



As a user, you can create a contract from pre-loaded templates or import a third-party document as an offline contract document. Contract Management works with optical character recognition software to scan imported third-party papers and convert them to a searchable PDF. You can send your contract documents for eSignatures if Contract Management is integrated with eSignature solutions—Conga Sign, Adobe Sign, and DocuSign. Contract Management is able to provide a set of standard or customized, reports to track activity status, expirations, non-standard terms, etc. You can also use contract Explorer to configure and reuse searches and reports.

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

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

- Work with contracts
    - Create
    - Send for review

    - Negotiate
    - Finalize
    - Sign/Execute
    - Activate
- Execute REST APIs

> For end-user functionality, see Conga CLM on Conga Platform for Users and Conga CLM API Reference.

Key Terminology

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

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

What's New in CLM Documentation

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

202409.1.0

Document	Publication Date	Topic	Description
202409.1.0	27 Sep 2024	Working with Workflow Activities	New topic: Added Approvals and Document Generation activities.
		Viewing Clause Details	Modified topic: Added "View Settings" section.
		Working with Conga Copilot	Modified topic: Updated content with the new UI and supporting documents, global documents, and others.
		Asking Questions and Getting Answers	Modified topic: Updated information to include generating summary for supporting documents, global documents, and others; added the new UI content.
		Use Case for Chat Questions to Conga Copilot	
		Generating a Document Summary	Modified topic: Updated information to include generating summary for supporting documents, global documents, and others; added the new UI content.
		Visibility into the Contract Lifecycle Stage	Modified topic: Added content about In Approvals and In Signatures workflow stages.
		Approval Flows	Modified topic: Updated content in Update Actions tab.
		Setting up Salesforce Org with Conga Platform for CLM	New topic

Document	Publication Date	Topic	Description
		Tenant Onboarding	New topic
		Configuring Conga Platform	New topic
		Managing External Integrations	New topic
		Managing API Connections	New topic
		Adding a New User	New topic
		Setting Up Conga Sign	Modified topic: Client ID and Client Secret fields removed
		Sharing Records with Users and User Groups	Modified topic: "To share a record with other users or user groups" section updated to include user group selection. "To revoke access on a record" section added
		Customizing CLM using Custom Actions	Modified topic: • Steps for the "To add a custom action button" section enhanced and a new section "o add a rule" added • "To add a custom action button in Clause List page" section added
		Reports and Dashboards	Modified topic: Descriptions for the new reports added to reports list
		Creating a Contract	Modified topic: "Visibility into the contract lifecycle stage" section updated to include automatic contract document generation stage.

202408.3.0

Document	Publication Date	Topic	Description
202408.3.0	13 Sep 2024	Managing Admin Console	New topic
		Enabling Quick Contract Creation with Default Values	New topic
		General Settings	Modified topic: Added the "Restrict Editing after Activation" setting.
		Bulk Import	Modified topic: A note added in the "To upload the data" section in Bulk Import.
		Creating a Contract	Modified topic: A note added in the "To create a contract" section for user role-based display of contract creation options.
		Managing Custom Contract Relationships	Modified topic: "To create a custom contract relationship" section updated.

202408.2.0

Document	Publication Date	Topic	Description
202408.2.0	30 Aug 2024	Validation Rules and Visibility Rules	New topic
		Creating a Contract	Modified topic: "Visibility into the contract lifecycle stage" section updated to add information about the display of document generation activity.

Document	Publication Date	Topic	Description
		Viewing Related Contracts	Modified topic: Steps related to Info icon to view Amendments and Renewals contracts and Other Contracts Removed. Screenshot showing the Other Contracts, Child Contracts, and Amendments and Renewals group by default added. Steps to filter records using Related Contract list added.
		Contract Line Items	Modified topic: To configure View Settings section added

202408.1.0

Document	Publication Date	Topic	Description
202408.1.0	16 Aug 2024	Comparing Clauses Versions	New topic
		.What's New in CLM Documentation v202409.1.0	Modified topic: • Removed steps on the clause content being displayed on the right panel when you select a clause. • Removed step on the Show Changes toggle. • Added steps about viewing the Details and Clause Content tabs. • Added a note for the option to edit the Clause Details page layout.

Document	Publication Date	Topic	Description
		Searching Contract Documents	Modified topic: Updated the step in "To search contract documents across multiple objects" section that according to the primary object specified in the search criteria, click the contract name or account name hyperlink to display the contract details or accounts details.
		Viewing Related Contracts	Modified topic: Updated the content that the fields for the account and contract objects in the contract hierarchy card.
		Preview and Submit	Modified topic: Updated the step in "Submitting an approval request" section that you can wait a few seconds or click Take Me Back Now button to redirect to the Contract Details page.
		Sending a Contract for Simple Review	Modified topic: Updated the notes in Available Documents section and Add Attachments section to remove the mention of .msg file type not supported.
		Sending a Contract for Microsoft 365 Review	
		Finalizing a Contract	
		Importing Documents Using Intelligent Import	Modified topic: Added a note in "To navigate to CCI from the Contract Details" section and added a reference link for more information on reviewing imported documents.

Document	Publication Date	Topic	Description
		Creating a Contract	Modified topic: Added a reference link in "To import a document using Conga Contract Intelligence" section for more information on importing documents and files.
		Configuring Adobe Sign Parameters in Conga Platform	Modified topic-Added the description for the Show reminder and expiration for end user toggle button
		Sending Documents for eSignature with Adobe Sign	Modified topic-Added a note about the Show reminder and expiration for end user toggle button and descriptions for Expiration and Reminders parameters.
		Setting Up Conga Sign	Modified topic-Updated the prerequisites and steps to match the fields displayed in the UI.
		Sign APIs	Modified API: The following API is moved from ESignature APIs to CLM APIs: /api/clm/v1/sign/esignatures/wetsign/\{transactionId\}/end
		Contract Relationship APIs	Modified API: Account number is included in response code of the following API. GET /api/clm/v1/contracts/{contractId}/hierarchy

202407.2.0

Document	Publication Date	Topic	Description
202407.2.0	02 Aug 2024	About User Profiles in CLM	New topic
		Viewing Alternate Clauses	Modified topic: Added steps to view the alternate clause for a standard clause.
		Reports and Dashboards	Modified topic: Updated a step in "To access Reports and Dashboards" section that you can access Reports and Dashboards from Contract Apps > CLM Dashboard.
		Document Protection Setup	Modified topic: Updated the "To edit a document protection setting" section to indicate that protection level can be selected for user defined as well as automatic protection types.
		Uploading a Document	Modified topic: Included the newly supported file formats in the note in the step to upload files.
		Using Conga Drive	New topic
		Generating a Contract Document	Modified topic: Added a note in "To generate a contract document" section that the contract templates created using Conga Drive are listed for selection.
		Regenerating a Contract Document	Modified topic: Added a note in "To update a contract document" section that the contract templates created using Conga Drive are listed for selection.

202407.1.1

Document	Publication Date	Topic	Description
202407.1.1	19 Jul 2024	Customizing CLM using Custom Actions	New topic
		Exporting Clause Records	New topic
		Managing Incoming Requests	Modified topic: Under "View Setting" section, added info about Added info about saving the filtered view and set it as the default vie
		Working with Clauses	Modified topic: In "To view clause details" section, added a note about clause content displayed as HTML
		Exporting Contract Details	Modified topic: Removed steps related to Export drop-down and added steps to click the download icon available above the contract list.
		Managing Account's Contract Details	Modified topic: Added a link to Creating a Contract topic in To create a new contract for an account section for the users to understand the contract creation process.
		Changing a Contract's Ownership	Modified topic: Added information about the email notifications sent to the contract owners along with the contract URL.
		General Settings	Modified topic: Added a note for Watermark Text field

Document	Publication Date	Topic	Description
		Document Format Setup	Modified topic: Added steps for Document Action and Default Watermark dropdown list in Add Document Format popup.

202406.2.0

Document	Publication Date	Topic	Description
202406.2.0	05 Jul 2024	Generating a Contract Document Summary	New topic
		Creating a Contract	Modified topic: Updated steps for contract creation through Fill out a contract form option and Import a document (both Import and Store executed document options) for contract type selection as the first step. Added a note about field display based on contract type selection.
		Viewing Contract Documents	Modified topic: Added a step for the View Settings functionality.
		General Settings	Modified topic: Added information about "Editable Contract Number for Contract Request Form" setting.
		Creating a Contract Request	Modified topic: Added information about Contract Number field.
		Customizing CLM Using Callbacks	Modified topic: Added description for new callback methods

202406.1.0

Document	Publication Date	Topic	Description
202406.1.0	21 Jun 2024	Sending a Contract for Simple Review	Modified topic: • To send a contract document for review section modified to mention the option to toggle between the view and the display of review status in Available Documents section. • The note in To send a contract document for review section updated for contract document selection condition. The description at the end of the section updated to remove the content about separate emails sent for each selected contract-document-type document.
		Sending a Contract for Microsoft 365 Review	Modified topic: • To send a contract document for review section modified to mention the option to toggle between the view and the display of review status in Available Documents section. • The note in To send a contract document for review section updated for contract document selection condition.
		Contract Rules	Modified topic: Added To clone a contract rule section
		Viewing Activity History	Modified topic: Contract creation actions added to the list of activities displayed in the history.

202405.2.0

Document	Publication Date	Topic	Description
202405.2.0	22 Jun 2024	Configuring Reminders and Expiration Notifications	New topic
		Configuring DocuSign Parameters in Conga Platform	Modified topic - Added steps for Reminders and Expirations configuration
		Sending Documents for eSignature with DocuSign	Modified topic - Added steps for Reminders and Expirations configuration
		Contract Rules	New topic
		Use Case for Contract Rules	New topic
		Submitting a Document Generation Request	New topic
		Bulk Import APIs	APIs introduced: • DEL api/clm/v1/import/jobs/{{jobId}} • GET api/clm/v1/import/jobs/{{jobId}}/batch/{{batchId}}
		Submit Request API	POST api/clm/v1/contracts/{contractId}/submitrequest

Document	Publication Date	Topic	Description
		Creating a Contract	• A table added to describe the actions available after contract creation. • Added a line about tooltip in "Visibility into the contract lifecycle stage" section. RN description added.
		Importing Bulk Data	Modified topic - Added descriptions for refreshing the file status, downloading the error log, and deleting a file.
		Sharing Records with Users	New topic
		Reports and Dashboards	New topic
		Working with Conga Copilot	New topic
		Working with Related Items	New topic
		Copilot APIs	APIs introduced: • POST /api/clm/v1/contracts/{CONTRACT_ID}/copilot/{DOCUMENT_ID}/summarize • POST /api/clm/v1/contracts/{CONTRACT_ID}/copilot/{DOCUMENT_ID}/chat
		Editing a Contract Request	Modified topic - Added a note about editing a contract name.

202405.1.0

Document	Publication Date	Topic	Description
202405.1.0	08 Jun 2024	Recall a Signature Request	New topic
		Configuring Reminders and Expiration Notifications	New topic
		Sending Documents for eSignature with DocuSign	Modified topic - Added for the option to send the document directly to the recipient bypassing the DocuSign Console.
		Contract Fields	Modified topic - • Added information about email notification for Termination Notice Days. • Added information about email notification for Expiration Notice Days. • Updated descriptions for Contract Start Date and Contract End Date to add information related to Fixed Term term type contracts.
		Managing Notifications	New topic
		Searching Contract Documents	Modified topic - Added a topic to search contract documents across multi-objects.
		Creating a Contract	Modified topic - Added 'Visibility into contract lifecycle stage' section.
		Activating a Contract	Modified topic - Prerequisites section updated about start date and end date modified.

Document	Publication Date	Topic	Description
		Configuring a Page Layout	Modified topic - Added information about assigning page layouts based on record type and user profile.

202404.2.0

Document	Publication Date	Topic	Description
202404.2.0	25 May 2024	Deleting a Clause	Modified topic - Added a note that you cannot delete an alternate clause associated with a standard clause,
		Managing Views	New topic
		General Settings	Modified Document Naming Convention setting

202404.1.0

Document	Publication Date	Topic	Description
202404.1.0	11 May 2024	Creating a Contract Request	Modified topic - Added note at the end of the page on: • Creating multiple contract requests with "In progress" status. • Editing an "In progress" contract request.
		Contract APIs	APIs introduced: • POST api/clm/v1/esignatures • GET api/clm/v1/esignatures/signertypes
		Configuring DocuSign Parameters in Conga Platform	Added a step to turn on or off the DocuSign Templates Enabled toggle.
		Sending Documents for eSignature with DocuSign	Added a step to select a template from the Apply Templates dropdown.

202403.3.0

Document	Publication Date	Topic	Description
202403.3.0	18 Apr 2024	Generating a Contract Document	Modified topic - updated the note about document format selection.
		Regenerating a Contract Document	Modified topic - Updated the note about document format selection.
		Working with In Effect View	Modified topic - Updated the "To view contract documents" section to include the link to download document

Document	Publication Date	Topic	Description
		Template Filter Rules	Modified topic - Updated use case for setting up user-defined filters to narrow the list of templates
		Sending a Contract for Simple Review	Modified topic - Added information about sequential increment of review cycle count
		Sending a Contract for Microsoft 365 Review	Modified topic - Added information about sequential increment of review cycle count
		Configuring Adobe Sign Parameters in Conga Platform Viewing a Signed Document with Adobe Sign	Modified topic - Added a description for Retrieve as Combined Document setting
		Configuring DocuSign Parameters in Conga Platform Viewing a Signed Document with DocuSign	Modified topic - Added a description for Retrieve as Combined Document setting

202403.2.0

Document	Publication Date	Topic	Description
202403.2.0	03 Apr 2024	Template Filter Rules	New topic
		Setting Up Template Filter Rules	New topic
		Configuring a Page Layout	New topic
		Viewing Contract Documents	New topic

202403.1.0

Document	Publication Date	Topic	Description
202403.1.0	20 Mar 2024	Deleting an Incoming Request	New topic.
		Searching Clauses	Modified topic - Added a note about searching Standard or Alternate clauses by filtering Clause Format as X-Author or Web
		Editing a Clause	Modified topic - Added a note on maximum number of 20000 characters can be entered in the clause text.
		Importing Offline Documents	Modified topic - Updated the note to specify upload size limit.
		Approval Rules	New topic.

Document	Publication Date	Topic	Description
		Contract Fields	Modified topic - Added the approval statuses to the contract fields list.
		Preview and Submit	Modified topic - Preview and submit an approval request from the Contract Details page.
		My Approvals	Modified topic -Accessing the My Approvals page from the Contract Details page.

202402.2.0

Document	Publication Date	Topic	Description
202402.2.0	06 Mar 2024	Creating an Account	Modified topic: • Added details about selecting contacts as a primary point of contact for the account. • Added details about selecting currency for an account from a picklist instead of manually entering it.
		Working with Contract Terms	Modified topic - Contract End Date auto-calculation related information added to the notes for 'Fixed term' and 'Auto Renew' contract term type.
		Importing Offline Documents	Modified topic - Added Restriction section.

Document	Publication Date	Topic	Description
		Sending a Contract for Simple Review Sending a Contract for Microsoft 365 Review	Modified topic - Added details about the enhanced confirmation message displayed upon review completion.
		Searching Clauses	Modified topic - Added details about searching X-Author standard clause or alternate clause.
		Editing a Clause	Modified topic - Added details about editing an X-Author standard clause.

202402.1.0

Document	Publication Date	Topic	Description
202402.1.0	21 Feb 2024	Deleting Accounts	Modified topic. Added details about deleting multiple accounts from the Accounts list.
		Deleting Contacts	Modified topic. Added details about deleting multiple contact from the Contacts list.
		Exporting Contract Details	New topic.
		Working with In-Effect View	Modified topic. Added details about Contract Number and Contract Name links to view the contract in a new window.

February '24

Document	Publication Date	Topic	Description
Februrary' 24	07 Feb 2024	Managing Accounts	New topic.
		Accounts Interface	New topic.
		Creating an Account	New topic.
		Deleting an Account	New topic.
		Searching Accounts	New topic.
		Managing Account's Contact Details	New topic.
		Managing Account's Contract Details	New topic.
		Managing Contacts	New topic.
		Contacts Interface	New topic.
		Creating a Contact	New topic.
		Deleting a Contact	New topic.
		Searching Contacts	New topic.
		Managing Contact's Contract Details	New topic.
		Working with Contract Requests	New topic.
		Contract Requests Interface	New topic.
		Creating a Contract Request	New topic.
		Searching Contract Requests	New topic.

Document	Publication Date	Topic	Description
		Working with Incoming Requests	New topic.
		Using Smart Search	New topic.
		Searching Contract Documents	New topic.
		Previewing Contract Documents	New topic.
		Exporting Contract Documents	New topic.
		Configuring the Approval Workflow	New topic.
		Creating an Approval Flow	New topic.
		Working with Approvals	New topic.
		Preview and Submit	New topic.
		My Approvals	New topic.
		Bulk Import	New topic.
		Viewing Recently Viewed Contracts	New topic.
		Changing a Contract's Ownership	New topic.
		Deleting a Contract	New topic.
		Defining Clone specifications	Modified topic.
		Sending a Contract for Simple Review	Modified topic.
		Sending a Contract for Microsoft 365 Review	Modified topic.

Document	Publication Date	Topic	Description
		Finalizing a Contract	Modified topic.
		Creating a Contract	Modified topic.
		General Settings	Modified topic.
		Viewing Activity History	Modified topic.
		Contract Status Categories and Statuses	Modified topic.
		Contracts APIs	Modified topic.

October '23

Document	Publication Date	Topic	Description
October '23	03 Oct 2023	Activating a Contract	Modified topic.
		Adding Line Items	New topic.
		Availability of Contract Actions	New topic.
		Configuring a Default Signature Option	New topic.
		Contract Fields	Modified topic.
		Creating a Contract	Modified topic.
		General Settings	Modified topic.
		Generating a Contract Document	Modified topic.

Document	Publication Date	Topic	Description
		Generating Supporting Documents	Modified topic.
		Importing Documents using Intelligent Import	Modified topic.
		Importing Offline Documents	Modified topic.
		Joining Documents	New topic.
		Regenerating a Contract Document	New topic.
		Searching Contract Documents	New topic.
		Sending a Contract for Office 365 Review	Modified topic.
		Sending a Contract for Simple Review	Modified topic.
		Sending a Contract for Wet Signatures	Modified topic.
		Setting Up Document Format	Modified topic.
		Setting Up Document Protection	Modified topic.
		Using Clause Library	New topic.
		Viewing Activity History	New topic.
		Working with Clauses	Modified topic.
		Working with Contract Terms	New topic.

Document	Publication Date	Topic	Description
		Working with In Effect View	New topic.
		Contract APIs	Modified topic.

June '23

Document	Publication Date	Topic	Description
June '23	07 Jun 2023	Document Protection Setup	New topic.
		Post-Contract Lifecycle Actions	New topic.
		Contract Status Categories and Statuses	New topic.
		Activating a Contract	Modified topic. Added details about post-contract lifecycle actions.
		General Settings	New topic.
		Document Versioning	New topic.
		Preparing for Microsoft 365 Reviews	New topic.
		Configuring Microsoft 365 Connections	New topic.
		Sending a Contract for Simple Review	Modified topic. Added details about label changes.
		Sending a Contract for Microsoft 365 Review	Modified topic. Added details about label changes.
		Creating a Contract	Modified topic. Added details about label changes.
		PDF Security Settings	New topic.
		Searching Contracts	New topic.
		Document Format Setup	New topic.

Document	Publication Date	Topic	Description
		Generating a Contract Document	New topic.
		Generating a Contract Document	New topic.
		Marking Required and Editable Fields on the Contract Details Page	New topic.
		Defining Clone Specifications	New topic.
		Document Versions	New topic.
		Generating Supporting Documents	New topic.
		Regenerating a Contract Document	New topic.
		Sending a Contract for Wet Signatures	New topic.
		Working with Dashboard	New topic.
		Viewing Related Contracts	New topic.
		Working with Clauses	New topic.
		Setting Up Conga Contract Intelligence (CCI)	New topic.
		Importing Documents Using Intelligent Import	New topic.

February '23

Document	Publication Date	Topic	Description
February '23	08 Feb 2023	All topics are new in this release	N/A

CLM for Administrators

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

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

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

- Basic administration
- Conga CLM terms and definitions

Select one of the following topics for more information:

- Managing Admin Console
- Configuring the CLM User Interface
- User Profile Management
- Configuring a Default Signature Option
- Managing Microsoft 365 Reviews
- Template Filter Rules
- Marking Required and Editable Fields on the Contract Details Page
- Setting Up Conga Contract Intelligence (CCI)
- Setting up Salesforce Org with Conga Platform for CLM

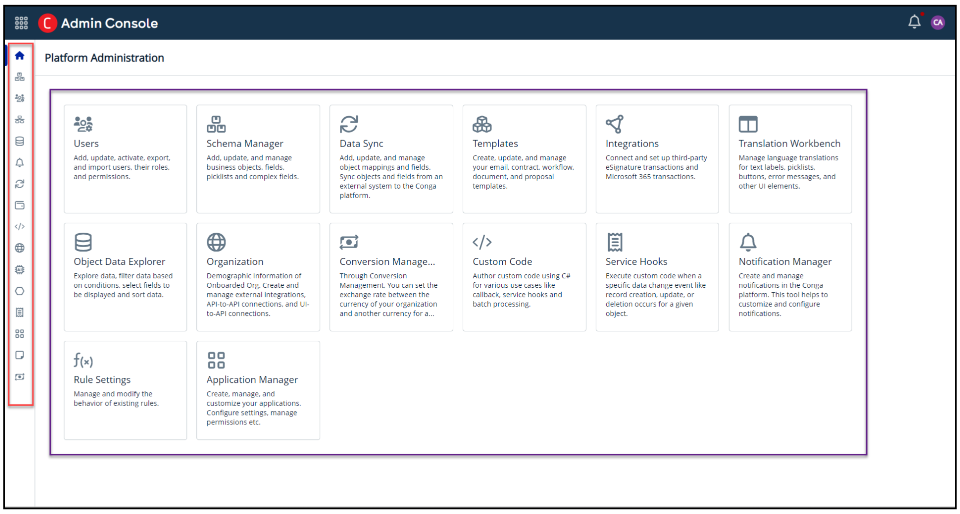
- Setting Up Wet Signatures
- Configuring the Approval Workflow
- Syncing Data between Salesforce and Conga Platform for CLM
- CLM Admin Setup
- Customizing CLM using Custom Actions
- Customizing CLM Using Callbacks

Managing Admin Console

The Admin Console is a Platform Administration app that includes various admin modules. This app allows administrators to configure and manage the settings for these modules within the Admin Console.

To access the Admin Console

1. Click the App Launcher icon ( )
2. Select Admin Console to view various modules as shown in the following image.



The Admin Console groups all tools and settings related to platform administration. The following table summarizes all settings and tools included in Platform Administration.

Module	Description
Users	Allows administrators to create and manage users and their access permissions. For more information, see Managing Roles and Permission Groups.

Module	Description
Workflow	Enables the automation of standard business procedures and processes without requiring coding. Acting as an orchestrator, it integrates various tasks related to transactional data for objects like contracts. This can streamline manual tasks, synchronize data across systems, and boost productivity. Activities enable you to create workflow definitions. These activities can be executed either manually or automatically. Examples include Approvals, Document Generation, and so on. For more information, see Managing Workflows.
Organization	Allows administrators to create and manage organization-level details and external integration. For more information, see Managing Organization.
Notification Manager	Allows to set alerts to notify contract managers and stakeholders when contracts are nearing their termination or expiration dates. This allows them to promptly take appropriate actions, such as initiating contract renewals or renegotiations. For more information, see Managing Notifications.
Rule Settings	Allows to set up template filter rules in the template selection page to narrow the list of templates displayed to the user for generating documents and supporting document tasks. Administrators can set up the template filter rule and allow contract fields and related child object fields to be used in selecting the templates. For more information, see Template Filter Rules.
Application Manager	Allows you to create, manage, and customize applications. You can rearrange apps as icons in the global navigation and control their accessibility based on permission groups. For more information, see Application Manager.

Configuring the CLM User Interface

Select one of the following topics for more information:

- Configuring a Page Layout
- Enabling Quick Contract Creation with Default Values

Configuring a Page Layout

A page layout allows you to control the layout and organization of detail and edit pages. It enables you to configure entity information on grid view, manage record-level entities, related lists (sections), and define rules for individual actions and fields. You can configure the following aspects of a page layout through CX Studio Lite:

- Managing Data Grid View
- Managing Content Details View
- Adding Actions to Page Header
- Applying Rules

For more information, see Managing Page Layout.

Assigning a page layout by record type and user profile

You can also assign page layouts based on record type and user profile. You can configure different layouts for different contract types for the same user profile, or different layouts for the same contract type for different user profiles.

If the user has access to one record type, the page layout assigned to the record type or the user profile is displayed when the user initiates record creation. A user with access to more than one record type must select a record type based on which the corresponding page layout is displayed.

Validation Rules and Visibility Rules

You can set visibility or validation rules for page header actions, page tabs, sections within a detail page, and fields. For example, configure validation rules for contracts such as:

- If a user enters a currency value, they must select a currency type, or the system displays an error message.
- For contracts with the "MSA" agreement type, display the "Additional Information" section.
- If the contract number is not provided, display an error message in the contract number field.
- Display or hide actions and custom actions on the UI based on defined rule criteria.

For more information about how to add rules to actions, sections of the record detail page, fields of the record detail page, and tabs, see Applying Rules.

Examples of Validation Rules and Visibility Rules in CLM

You can fulfill the following validation and visibility scenarios using rule configuration:

- Make an optional field mandatory or vis-a-versa (through field-level error message) if the condition is met
- Disable or enable a field depending on the condition outcome
- Display or hide a field depending on the condition outcome
- Specify a default value for a field if there is no existing value (through JSON rule)

Business Scenario	Add Criteria Option	Configuration in the IF section	Configuration in the Then section	Configuration in the Else section
Hide the Contract Start Date and Contract End Date if the Contract Term Type is "Perpetual"	Field Criteria	Field = Contract Term Type Operator = Equals Value = Perpetual	Action = Hide Component = Field Field = Contract Start Date Action = Hide Component = Field Field = Contract Start Date	

Business Scenario	Add Criteria Option	Configuration in the IF section	Configuration in the Then section	Configuration in the Else section
On the new contract creation page, disable the Total Contract Value field if the Contract Category is "Others", else enable it	Field Criteria	Field = Contract Category Operator = Equals Value = Other	Action = Disable Component = Field Field = Total Contract Value	Action = Enable Component = Field Field = Total Contract Value
On the contract details page, hide the Payment Terms section for guest users if the total contract value is greater than $10000, else display it	Field Criteria	Field = Total Contract Value Operator = Greater Than Value = 10000	Action = Hide Component = Section Section = Payment Terms	Action = Show Component = Section Section = Payment Terms
	User Criteria	Field = Permission Groups Operator = Equals Value = GuestPermissionGroup		

Business Scenario	Add Criteria Option	Configuration in the IF section	Configuration in the Then section	Configuration in the Else section
On the contract details page, show a message saying "Please note that our company policy allows a maximum contract term of 36 months for contracts of type "NDA".	Field Criteria	Field = Contract Type Operator = Equals Value = NDA	Action = Show Message Component = Page Level Field = Error Message = Please note that our company policy allows a maximum contract term of 36 months for contracts of type "NDA	
On the contract details page, auto-populated the Notice Period field with "60" if the user selects "Fixed - Manual Inactivate" in the Contract Term Type field.	Field Criteria	Configure a Rule Condition JSON to check the value of Contract Term Type field Configure a Rule Action JSON to insert "60" in Notice Period field value		

Note

You can configure conditions with a combination of Field Criteria and User Criteria.

Enabling Quick Contract Creation with Default Values

You can configure the system to allow the users to create contracts quickly, without selecting contract creation options or filling in the contract details. A scenario where this configuration can be used is - There is a team in an organization that manages only NDA contracts. The contract creation process for these contract types should be simple without any need to select the contract creation option or fill up a lot of information. It should be possible for the team to simply initiate the contract creation process with default values configured in the schema. The contract manager can then edit the contract details with all the necessary information.

Prerequisite

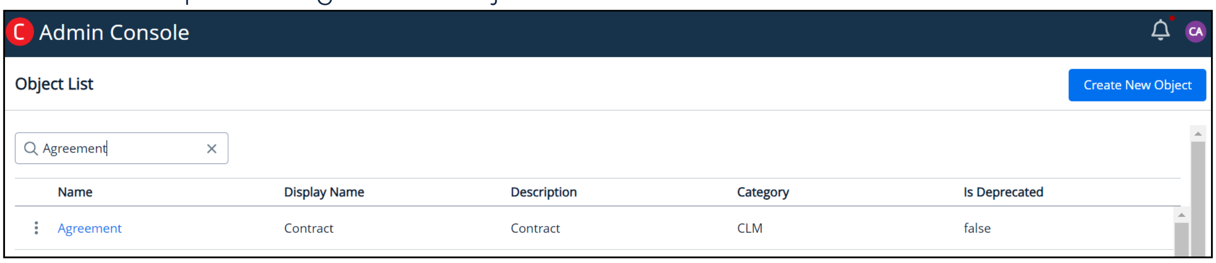
- The Contract Name field for the Agreement object is configured.

To enable a record type for the permission group

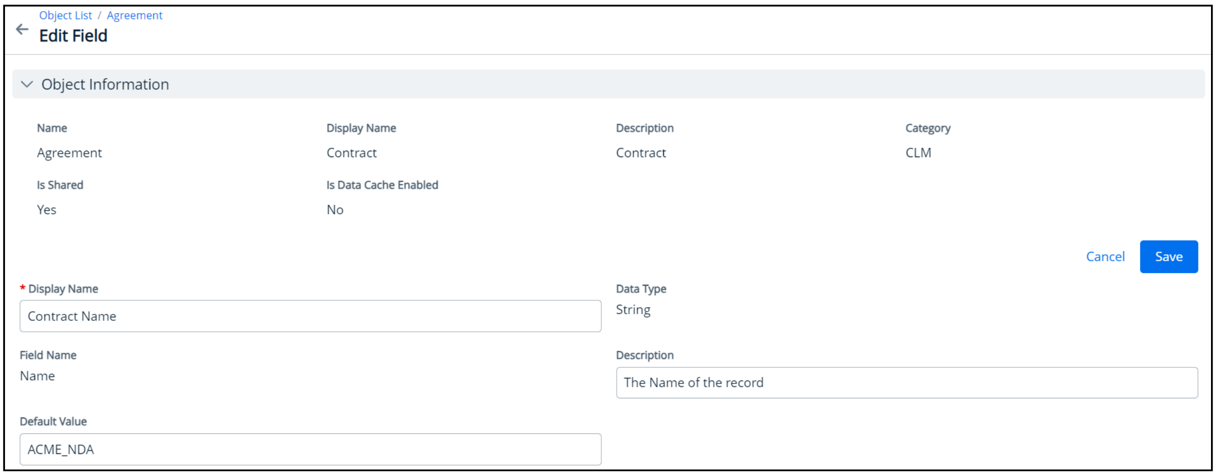
1. Using the /api/user-management/v1/recordtype-permissions API, enable the required record type for the permission group.

To specify a default value for contract names

1. Click the App Launcher ( ) icon from the top-left corner then go to Admin Console > Schema Manager.
2. Search and open the Agreement object.



3. In the Field tab, click More (⋮) icon for the Contract Name field and select **Edit**.



4. In the Default Value, specify the default contract name with which the contracts should be created.
5. Click **Save**.

You have configured the system for quick creation of contracts. When the user click Create New Contract, a contract for the record type enabled for the user's permission group is created with its name as the default value specified for the contract name field for the Agreement object. The contract details page is displayed. The contract information can be modified as needed.

User Profile Management

This section covers the following topics:

- About User Profiles in CLM
- Managing Roles and Permission Groups
- Configuring X-author Action Permissions for CLM Users

About User Profiles in CLM

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

Profile Name	Available Permissions Description
Conga CLM Administrator	Can configure and customize the application. Has access to all Conga CLM functionality that does not require an additional license.
Contract Manager/Template Admin	Can create, edit, execute, and approve contracts. This profile can also delete contracts as long as they are not executed. Can manage clause and language template library. Has access to X-Author for Contracts functionality
Read Only	Can view the organization's setup, run and export reports, and view, but not edit other records.
Requester/Approver	Can initiate new contract requests and use the Contract Wizard to assemble standard contracts, but does not have access to X-Author for Contracts. Can perform some limited searches and reporting.
Contract Creator/Negotiator	Can create, edit, execute, and approve contracts. This profile cannot delete agreements and does not have any permissions to manage clauses or templates. Has access to X-Author for Contracts in a negotiator role.

- **CLM User Roles & Tasks**
  The following table presents the broad view of some of the key CLM roles and their descriptions:

Role	Description
Legal function	• Design, creation, maintenance of contract template contents • Review, negotiation, and contract legal content assurance • Legal admin, Internal counsel, External counsel

Role	Description
Finance function	• Evaluation and validation of contract's financial impact and risks • Approval of the commitment of resources per the contract • Financial analyst, Controller, CFO, Treasurer
SMEs	• Evaluation and validation of specific areas of contract commitments • Approval of their functional area of the contract's deliverables • VP / Director for Products, Procurement, Sales, Partner Management
Contract Facilitator	• Definition of non-standard, complex, or global contract components • Assignment of contributors, scoring, approval, and strategic aspects • VP Strategic Accounts, CEO, CFO, COO
Admin	• General definition of process, contributors, contract elements • Configuration of applications and tools required by the process • Application admin, system analyst, business analyst

- **Creating a User Profile**
  Profile is essentially a definition of a set of permissions granted to a group of users.
- **Adding a Single User**
  The maximum number of users you can create is determined by your Salesforce Edition.
- **Adding Multiple Users**
  The maximum number of users you can create is determined by your Salesforce Edition. Depending on the number of available licenses, you can create up to 10 users.
- **Assigning Conga CLM License to a User**
  In addition to Salesforce licensing, a user profile must be assigned to the Conga CLM license.
- **Assigning Users to Queues**
  Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group

member. If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

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

Managing Roles and Permission Groups

Role and Permission Group management helps administrators configure security on the Conga Platform. A role represents a profile (e.g., system admin, contract facilitator, general user, etc.). Administrators can create user roles that contain a set of permissions with specific access to objects, records, pages, and administrative functions in applications that are built on the Conga Platform. You can either use the User Interface or REST APIs as per your business needs.

Please see Managing Roles and Permission Groups for more information on the following topics:

- Understanding Role-Based Access Control
- Creating Permission Groups
- Working with Permission Groups
- Creating Roles
- Working with Roles
- Creating User Groups

Configuring a Default Signature Option

When sending documents for signatures, users have the following signature options:

- DocuSign
- Adobe Sign
- Conga Sign
- Wet Signature

You can configure a default signature option, simplifying the process for users who frequently send documents for signatures. To set a default option while still allowing users to choose a different signature method when needed, select the Active option during configuration.

By default, the Wet Signature option is configured as default and active.

Restriction

You can set only one signature option as default.

To configure a default signature option

1. Click the app launcher ( ).
2. In the left panel, under Admin Apps, click **Integrations**.
3. In the eSignature API Connections tab, click **Edit** for a Connection Name under the Action column.
4. Turn on the Default option for signature toggle.
   The Active toggle turns on automatically and is disabled. If the Active toggle is on, it stays the same and is disabled.
5. Click **Save**.

   > You cannot turn off the Default option for the signature toggle unless you have enabled it for another signature. Enabling the Default option for another signature enables the Active toggle and leaves it on while turning off the Default option for the signature toggle.

Managing Microsoft 365 Reviews

Select one of the following topics.

- Preparing for Microsoft 365 Reviews
- Configuring Microsoft 365 Connections

Preparing for Microsoft 365 Reviews

This topic provides guidelines for selecting a flow for Microsoft 365 configuration. You must consult your organization's SharePoint or Azure configuration team before finalizing the

Microsoft 365 configuration approach. You can choose to configure Sharepoint or Azure App according to your requirements.

About Microsoft 365 Configuration

Sharepoint

During Microsoft 365 review, SharePoint temporarily stores agreement documents when a review cycle is initiated. Agreement documents are removed once the review cycle is ended in CLM. Hence, you must provide the required permissions for users to access the stored files.

Site Configuration

You can create a dedicated site in your organization's SharePoint and use the configuration details while configuring Microsoft 365 feature in CLM. If you do not create and configure a dedicated site in your organization's SharePoint, Microsoft 365 uses your organization's default site.

Folder Configuration

You can create a folder in the configured SharePoint site and use the folder details while configuring Microsoft 365 feature in CLM. If you do not create a folder, SharePoint creates a default folder in the configured SharePoint site and adds all CLM agreement documents to the default folder.

Azure App

You must use Azure to communicate between CLM and SharePoint. You can create an app in your Azure portal.

App Permissions

You must provide the required permissions to the Azure app for all the reviewers to allow the Azure app to create folders and files. You can use one of the following flows to facilitate interaction between the Azure app and SharePoint.

- Application Flow
- Delegated Flow

Application Flow

The Azure app can directly interact with SharePoint without any user interference. There is no need for user permission or user interference. For more information, see Application permissions and Application access.

Delegated Flow

The Azure app cannot interact with SharePoint without user interference. Both the review initiator and the Azure app must have permission to create a folder or file and add permission in SharePoint. When sending a document for review, the review initiator must log in every time. Hence, this is a restrictive flow. For more information, see Delegated permissions and Delegated access.

App Configuration

The app creation and configuration are different for the application and delegated flows. You must select a flow that is appropriate to your organization's policy.

Configuring Microsoft 365 Connections

This section provides you with information about how to configure Microsoft 365 Connections to allow users to send documents for review using Microsoft 365.

Prerequisites

- Microsoft 365 E3 or E5 subscription.
- Azure Client ID, Client Secret, and Active Directory. Contact your IT administrator for these.

Configure one of the following flows in the Azure app

Delegated Permission Flow

To configure the delegated permission flow

1. In the authentication tab from the Azure app that you had created in the previous configuration, add URI with the instance URL of the org and with the suffix as */apex/apttus__MSAuthorize*.
   Sample value: `https://test-tbox.my.salesforce.com/apex/apttus__MSAuthorize`
2. Select API permission under API Permission > Add permission > Microsoft Graph > Delegated Permission.
3. Provide the following permissions for Microsoft Graph APIs:
   - Directory.Read.All
   - Files.ReadWrite.All
   - Sites.Read.All
4. On the API Permissions page, click **Grant admin consent** for the permissions where **Admin consent required** is marked as Yes.

Application Permission Flow

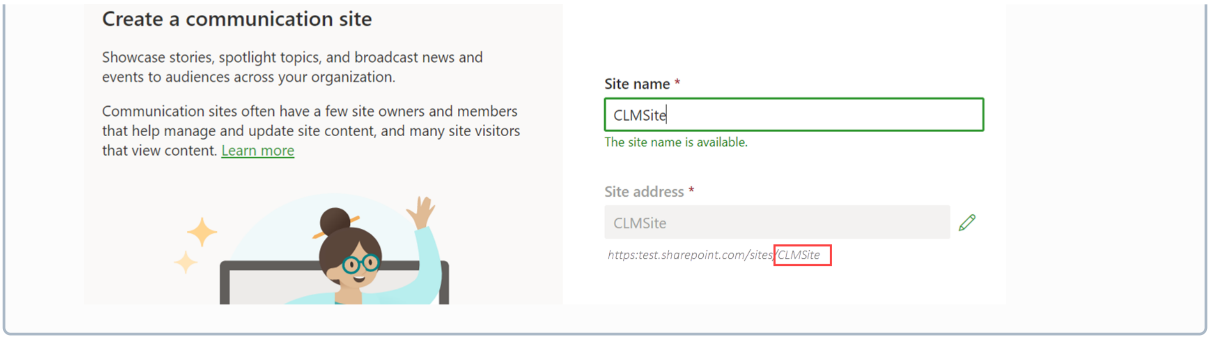
To configure the application permission flow

1. Select API permission under API Permission > Add permission > Microsoft Graph > Application Permission.
2. Provide the following permissions for Microsoft Graph APIs:
   - Directory.Read.All
   - Files.ReadWrite.All
   - Sites.Read.All
3. On the API Permissions page, click **Grant admin consent** for the permissions where **Admin consent required** is marked as Yes.

(Optional) To configure a specific SharePoint site

1. Create a SharePoint Communication Site. For more information, see Create a Site in SharePoint.

   > ⓘ You must use the site name from the URI as shown in the screenshot when you are configuring SharePoint 365 Site Setting in CLM.



To configure the Microsoft 365 Connections

1. Click the app launcher ( ) and select **Admin Console**.
2. In the left panel, click **Integrations**.
3. Click the **Microsoft 365 Connections** tab.
4. Click **New**.
5. Enter the following details to connect to Microsoft 365:
   a. Name: Enter Microsoft `365`.
   b. **MS Login URL**: Enter the Microsoft 365 login URL to connect to the service. To find Tenant Id, see How to find your Azure Active Directory tenant ID.
   Sample value: `https://login.microsoftonline.com/<TenantID>/oauth2/v2.0/`
   c. **MS Graph URL**: Enter the Microsoft 365 URL to connect to the service.
   Value: `https://graph.microsoft.com/v1.0/`
   d. **Scope**: Enter the scope to be used in the Microsoft 365 Graph API.

   > ⓘ Ensure you add appropriate values per the configured authentication flow.

   For application flow (Permit Delegation is disabled in the Microsoft 365 setting):
   `https://graph.microsoft.com/.default`
   For delegated flow (Permit Delegation is enabled in the Microsoft 365 setting):
   `offline_access Files.ReadWrite.All`
   e. **Client Id**: Enter the client ID. (Refer to step 7 in the previous configuration)
   Sample value: `8m7r4**d-****-4c**-b4d8-e4a6b***79b`
   f. **Client Secret**: Enter the client secret. (Refer to step 11 in the previous configuration)
   Sample value: `taiLWUY*****38&7B%400$5234c***UY%`
   g. **Show Client Secret**: Select the checkbox to expose the Client Secret field value.
   h. **SharePoint Site**: Enter the Microsoft SharePoint Site you use for Microsoft 365 review. (Ensure you do not enter the site URL. For more information, see SharePoint Site Configuration.)

Sample value: `CLMsite`

> The system uses the organization's default site if no SharePoint site is configured.

i. **Folder Path**: Enter the folder path to upload documents to SharePoint.
Sample value: `ContractDocuments`

> If the folder path is blank, the system creates a folder named "Conga CLM Temp Folder" to store the documents to be reviewed.

j. **Permit Delegation**: After you log in to Microsoft, select the Permit Delegation checkbox, enabling users to grant delegate access.

> Select the Permit Delegation checkbox only if you configured your Azure app for delegated flow.
> Enabling the Permit Delegation toggle button also ensures that only authorized users send out the documents for review. Users are prompted for Microsoft email address and password, if they have logged out from their Microsoft account or if the token is expired.

6. Click **Test Connection** when the setting is active to check if all the entered values are correct.
7. Click **Save**.

Template Filter Rules

Users generate contract documents and supporting documents during the contract management life cycle. While generating a contract document or supporting documents, the application displays a list of templates the user can select. The list of templates displayed depends on the configuration of the template filter rule.

Using template filtering rules, you can set up user-defined filters to narrow the list of templates that are displayed for tasks that involve generating contract documents or supporting documents. Administrators set conditions that determine which templates are displayed during contract document and supporting document generation.

The template filter rule looks for a match between fields on the contract and template records. For example, for contract templates created for multiple languages, you should only be able to select templates for the language to which they belong. The template filter uses contract fields and related child object fields to select the templates to display.

Use cases for creating template filter rules

Use case 1

This use case describes filtering templates to generate contract documents or supporting documents using template filter rules. For example, if templates are created for multiple languages, a user might see and pick only language-appropriate templates.

Let us consider that the contract record contains a Language field with the possible values of English or Spanish and the template record contains a similar Language field. By matching the Language field values in the contract and template records, the template filter rule presents the appropriate template for document generation.

To create a template filter rule, perform the following steps:

1. Use the **Template Filter Rules** tab to create a template filter rule.
2. The template filter rule has two related lists: **Qualifiers** and **Filters**.
3. Add a new qualifier and provide the following information.
    a. **Field**: Select the field to be used for the template filter rule. For example, Language.
    b. **Operator**: The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field. For example, Equals.
    c. **Value**: The type of value field depends on the field selected. For example, Spanish.
4. Add a new filter and provide the following information.
    a. **Field**: Select the field to be used for the template filter rule. For example, Language.
    b. **Operator**: The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field. For example, Equals.
    c. **Value**: The type of value field depends on the field selected. For example, Spanish.
5. Generate a contract document. The desired templates are displayed

Use case 2

This use case describes filter templates when the contract is in "In Amendment" status and the template contains the keyword "Amendment" entered in X-Author for Contracts.

1. Create a contract-type template to be used in amendment situations.
   Use any keyword in the keywords field. For example, Amendment.
2. Using the **Template Filter Rules** tab, create a template filter rule.

3. The template filter rule has two related lists: **Qualifiers** and **Filters**.
4. Add a new qualifier and provide the following information.
    a. **Field:** Select the field to be used for the template filter rule. For example, Status
    b. **Operator**: The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field. For example, Equals
    c. **Value**: The type of value field depends on the field selected. For example, In Amendment
5. Add a new filter and provide the following information.
    a. **Field:** Select the field to be used for the template filter rule. For example, Keywords
    b. **Operator**: The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field. For example, Contains
    c. **Value**: The type of value field depends on the field selected. For example, In Amendment
6. Generate a contract that is in the In Amendment status. The desired amendment template is displayed.

For more information on configuring a template filter rule, see Setting Up Template Filter Rules.

Setting Up Template Filter Rules

You can set up template filter rules in the template selection page to narrow the list of templates displayed to the user for generating documents and supporting document tasks. Administrators set up the template filter rule and allow contract fields and related child object fields to be used in selecting the templates.

The template selection page for the contract generation displays only the templates that apply to the contract. For example: For the contracts of Type Other, show the templates that are defined for a region.

This section describes how to create, edit, clone, and delete a template filter rule.

To create a template filter rule

1. Click the App Launcher icon ( ) and select **Admin Console**.
2. Click **Rule Settings**. This displays the Template Filter Rules tab.
3. To create a new template filter rule. Click **Add New**.
4. In the Details section:

   a. Enter the template filter rule name in the **Template Filter Rule Name** field.
   b. Select the object from the **Object** drop-down menu. This displays the Qualifiers and Filters sections.

      > - Qualifier is a condition on the Contract object.
      > - Filter is a condition on the Template object.

   c. Select the filter type from the **Filter Type** drop-down menu.
   d. Enter the description for the template filter rule. You can enter a maximum of 2000 characters.
   e. **Active**: Slide the **Active** toggle to make the template filter rule active. You can also make it active by sliding the **Active** toggle from the template filter rule list page.
5. In the Qualifiers section, perform the following steps:
   a. Click **Add Criteria**.
   b. Select a field to be used in the filter criteria.
   c. Select an operator from the **Operator** drop-down menu. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
   d. Enter the value of the field. The type of value field depends on the field selected.
   e. To add another filter, click **Add Criteria** and repeat steps 5 (a), (b), and (c).
   f. Click **Apply**.
6. In the Filters section, perform the following steps:
   a. Select a field to be used in the filter criteria.
   b. Select an operator from the **Operator** drop-down menu. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
   c. Enter the value of the field. The type of value field depends on the field selected.
   d. To add another filter, click **Add Criteria** and repeat steps 6 (a), (b), and (c).
   e. A formula is displayed in the Filter Expression text box showing the criteria added. You can also alter the filter expression.
   f. Click **Apply**.
7. Click **Create**. This displays the "Template Filter Rule {Template Filter Rule Name) has been created successfully." popup.

To edit a template filter rule

1. Click the Template Filter Rule link to open the template filter rule details.

2. Edit the details and click **Save**. This displays the "The Data is saved successfully." popup.

To clone a template filter rule

You can clone a template filter rule from a list of template filter rules.

1. Click the More icon ( ) in the row that you want to clone and select **Clone**. The text 'Clone' is added to the Template Filter Rule Name.
2. Edit the details and click **Create**. This displays the "The template filter rule has been cloned." popup.
   (or)

1. Click the Template Filter Rule link to open the template filter rule details.
2. Click the pencil icon ( ) to edit the details and click **Save**.
3. Click the **Clone** button. The text 'Clone' is added to the Template Filter Rule Name.
4. Edit the details and click **Create**. This displays the "The template filter rule has been cloned." popup.

To delete a template filter rule

You can delete a template filter rule from a list of template filter rules.

1. Click the More icon ( ) in the row that you want to delete and select **Delete**.
2. On the Delete Template Filter Rule window, click **Confirm**. This displays the "Template Filter Rule deleted" popup.
   (or)

1. Click the Template Filter Rule link to open the template filter rule details.
2. Click the **Delete** button.
3. On the Delete Template Filter Rule window, click **Confirm**. This displays the popup "Template Filter Rule deleted".

Marking Required and Editable Fields on the Contract Details Page

As a contract administrator, you can make the fields as required to enforce users to fill the required fields on the Contract Details page. You can also control the editability of fields to permit or restrict users from editing fields on the Contract Details page.

To mark required and editable fields

1. On the top of the Contract Details page, click **Edit Page**.
2. Click **Edit** in the Contract Details section.
3. Click a field that you need to mark the field as required or to make the field editable. The Permission Groups popup is displayed.
4. Turn on the required toggle to enforce users to add value in the field.
5. Turn on the editable toggle to allow users to edit the field.

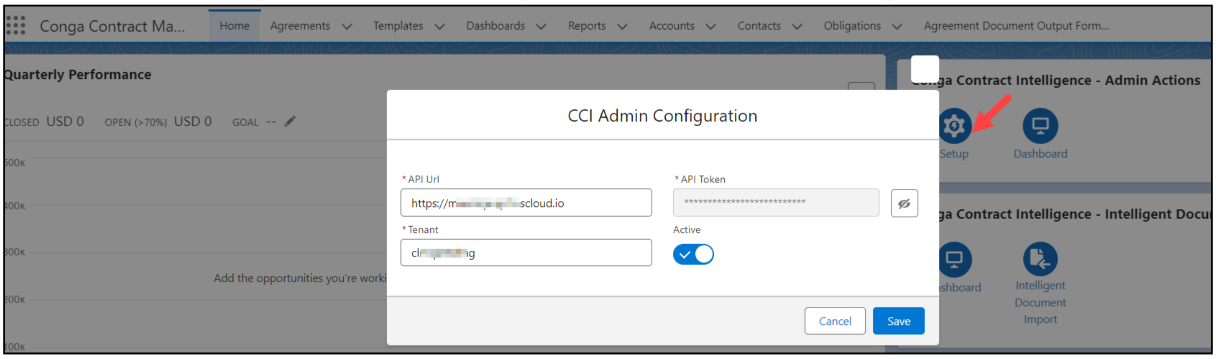
Setting Up Conga Contract Intelligence (CCI)

You need to configure Conga Contract Intelligence (CCI) set up to import documents using intelligent import.

Prerequisite

You have Conga Contract Intelligence (CCI) license.

To set up CCI in Salesforce

1. Navigate to the Salesforce homepage.
2. Click **Setup** in Conga Contract Intelligence - Admin Actions widget.


3. Enter the API URL, API token, and Tenant information.

> ⓘ Enter the region-specific API URL.
> **For example:**
> **Preview Environment:**
> NA: https://rls-preview.congacloud.com

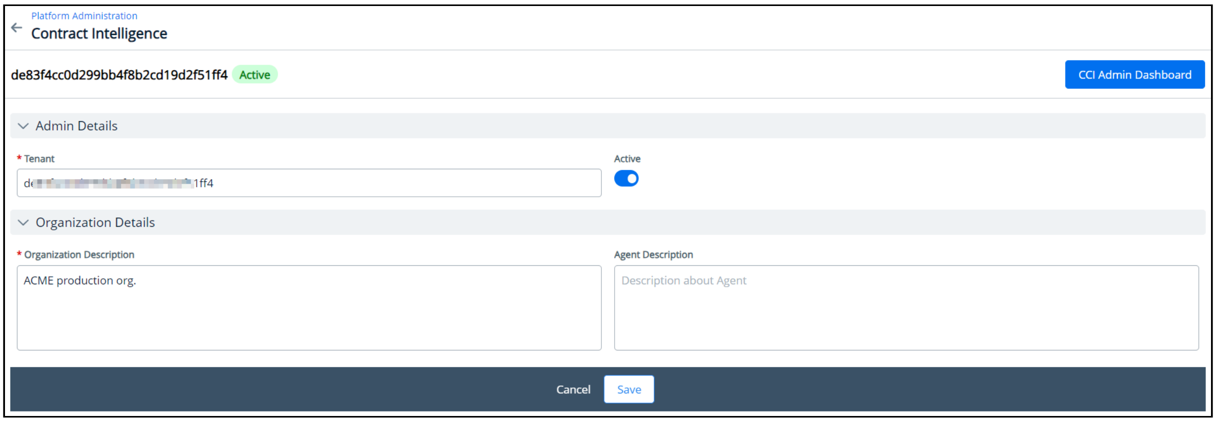
EU: https://rls-preview.congacloud.eu
AU: https://rls-preview.congacloud.au
Production Environment:
NA: https://rls.congacloud.com
EU: https://rls.congacloud.eu
AU: https://rls.congacloud.au

4. Turn on the Active toggle.
5. Click **Save**.

You have set up the CCI application in Salesforce.

To set up CCI in Conga Platform

1. Click > Admin Console and click Contract Intelligence ( ) icon in the navigation menu. The Contract Intelligence Setup page is displayed with a default entry for CCI admin configuration. The Tenant field value is automatically populated.
2. Verify the Active field value. If set to No, click **Edit** and toggle the button to Yes.
3. If needed, modify the organization details and agent description.



4. Click **Save**.

You have set up the CCI application in Conga Platform.

Setting up Salesforce Org with Conga Platform for CLM

To set up CLM Salesforce with the Conga Platform, administrators must configure both the Salesforce org and the Conga Platform. An administrator may take on one of several personas, including a customer administrator, partner administrator, or any other administrator tasked with setting up the Salesforce org with the Conga Platform. In this topic, this persona is referred to as the customer administrator. This individual is responsible for completing the entire setup process, with support from the Conga CloudOps team.

The customer administrator is responsible for completing the entire setup process with assistance from the Conga CloudOps team.

Order	Task	Owner
1	Tenant onboarding	This task is the responsibility of the customer administrator and the Cloud Ops team. • Customer administrator contacts the Conga service team to log a service ticket for tenant onboarding. • CloudOps team initiates the tenant onboarding process based on the service ticket.
2	Configuring the Salesforce org	Customer administrator
3	Configuring Conga Platform	Customer administrator

Tenant Onboarding

This topic outlines the necessary steps for tenant onboarding. Both the Conga CloudOps team and the customer administrator are involved in this process.

Prerequisites

You have provided the following information to your Conga support representative.

- Your 18-digit Salesforce org ID
- Administrator's first name and last name
- Administrator email ID
- Your Salesforce org domain name. To view the domain details of your Salesforce org, go to Setup > enter `my domain` in the Quick Find box and click **My Domain**.

To onboard a tenant

Conga support representative logs a tenant onboarding request with the following details.

- Salesforce org ID
- Admin user's first name and last name
- Admin user's email ID

On successful onboarding, the admin user receives a confirmation email containing Conga Org details, Conga Identity Provider (IdP) login credentials, and a one-time password.

After changing the password, you must configure the following in the Conga Platform and generate the client ID and client secret, which you require to set up an authentication provider.

- External integration
- Conga API connections (API-to-API connection)
- Conga API connections (UI-to-API connection)

To change the password

1. Click the login URL in the welcome email.
2. Enter the username and password.
3. Click **Sign-in** and follow the on-screen instructions to change the password.

Configuring Conga Platform

After you have configured your Salesforce org, you need to launch the Conga Platform and complete the setup process.

To launch Conga Platform

1. Click the Login URL in the welcome email.
2. Enter the username and password.
3. Click **Sign-in**. The Launch your Conga Experience page appears.
4. Click the App Launcher ( ) icon and click Admin Console > Users.
5. Perform the following steps for a successful setup.
    - Managing External Integrations
    - Managing API Connections
    - Adding a New User

Managing External Integrations

The External Integration tab allows administrators to view and manage users authorized through external organizations. You can add one or more external integrations; however, you can make only one as a default IDP.

To add a new external integration

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher ( ) icon from the top-left corner and go to **Admin Console** > **Organization**.
3. Open the External Integrations tab and click **Add New**, raising the Add New External Integration screen.
4. Choose **Identity Provider** (Salesforce or Salesforce Sandbox) from the drop-down list and click **Authorize**, to open the selected IDP's login screen.
5. Log in with your onboarded Salesforce org credentials.
   If you get any access-related prompts during this process, please allow full access.
   When you log in, the selected identity provider's external identifier auto-populates the External ID field.
6. Enter the type of this integration in the **Type** text field. It is a free-form text field. You can add types such as Dev, QA, UAT, Prod, etc.
7. Add the description.
8. Enable the **Default IDP** toggle to make it a Default External Integration IDP.
9. Click **Save**.

Managing API Connections

You must establish an API-to-API connection between your Salesforce org and Conga Platform. This connection ensures seamless communication and data exchange between your Salesforce org and Conga Platform.

To configure an API-to-API connection

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher ( ) icon from the top-left corner and go to **Admin Console** > **Organization**.
3. Go to the Conga API Connections tab and click **Add API-to-API Connection**.
4. Enter values in the following fields.

Field	Description
External Identifier	Select your Salesforce org ID from the drop-down. The external identifier list is populated based on the external integration that you added. For more information, see External Integrations.
Client Name	Enter the client name.
Description	Enter an appropriate description.

5. Click **Save & Generate Client Secret** to generate the Client ID.
6. Click **Copy** next to Client ID and Client Secret.
7. Save them for future use.

To configure UI-to-API connection

1. Login to the Conga Platform as an admin user.
2. Click the App Launcher ( ) icon from the top-left corner and go to **Admin Console** > **Organization**.
3. Go to the Conga API Connections tab.
4. Open the **Conga API Connections** tab and click Add **UI-To-API Connection**.
5. Enter values in the following fields.

Field	Description
External Identifier	Select your Salesforce org ID for which you want to configure the connection. The external identifier list is populated based on the external integration that you added. For more information, see External Integrations.
Client Name	Enter the client name.
Description	Enter an appropriate description.
Redirect URI	Enter the UI Callback Endpoint. It is the site to which identification and access tokens are sent.

Field	Description
Cors Origins	Enter the domain name present in the callback endpoint. It is the base URL of the origin server to enable cross-site requests. For example: https://<your Salesforce org domain>.my.salesforce.com
Back Channel Logout URI	Leave the field blank.
Front Channel Logout URI	Leave the field blank.

6. Leave the other fields blank.
7. Click **Save & Generate Client Secret** to generate the Client ID.
8. Click **Copy** next to the Client ID. Save it as a SPAClientId for future use.
   The UI to API connection is configured and activated.

You can deactivate or reactivate any of the Conga API Connections by using the respective hyperlink under the Actions column, and edit the configuration by clicking the External Identifier hyperlink on the list page.

Adding a New User

You can manage Conga Platform users using the User Administration user interface. The Users tab allows you to:

- Create, update, and manage users.
- Import user information.
- Assign roles to users.
- Set default options for users. For example, locale, time zone, date and time format, and other preferences.

- If the **Auto Provision User Enabled** toggle is enabled and the admin user has added and authorized the external integration, other users from that external integration can log in to the Conga Platform with their credentials, and the user is automatically created on the Conga Platform. For example, the admin user has integrated Salesforce as an external service and authorized it. In the

Salesforce organization, there are 10 users. Now, if the toggle is enabled, any of these users can log in to the Conga Platform using their Salesforce credentials. Once they log in, their account is automatically created on the Conga Platform. For more information, see Viewing Conga Org Details.

To create a new user

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to **Admin Console** > **Users**.
   A list of users is displayed.
3. Click **Add** to add a new external user. The User Details screen appears.
4. Enter values in the following fields:

Field Name	Description
User Type	Select an external user from the dropdown list.
ExternalId	Enter the user's external ID. This can be any unique alphanumeric text used to identify the user. This ID is used when migrating users from one environment to another. You can enter up to 2000 characters in this field. • For the Salesforce identity provider user, the user's unique Salesforce ID (18 digits) must be added as an external ID. For more information on how to get the 18-digit user ID, see Getting Salesforce User ID. • ExtetnalId is optional for Conga IDP users.
User Name	Enter the user's unique user name. The Conga IDP user uses this username to log onto the Conga Platform. You can enter up to 255 characters in this field.
First Name	Enter the user's first name. You can enter up to 255 characters in this field.
Last Name	Enter the user's last name. You can enter up to 255 characters in this field.

Field Name	Description
Email	Enter the user's email address. It must be a valid email address in the form: test@abc.com, test@abc.in, etc. You can enter up to 255 characters in this field.
Role	Enter the keyword to search and select the appropriate role to be assigned to a new user. A role is assigned to users performing similar tasks and consists of a set of permissions. For more information, see Managing Roles.
Permission Groups	Select permission group(s) from the list. Permission groups are assigned to users for additional access that is not part of the selected role. Permission groups determine a given user's access to objects and records, and permissions to perform actions in the Conga Revenue Lifecycle Platform.
Timezone	Enter the keyword to search and select the time zone from the list. If you do not provide a time zone, the application uses the organization's time zone and assigns it to the user.
Locale	Enter the keyword to search and select the locale from the list. If you do not provide a locale, the application uses the organization's locale and assigns it to the user.
Currency	Enter the keyword to search and select the currency from the list. If you do not provide a currency, the application uses the organization's currency and assigns it to the user.
Alias	Enter the user's alias name. You can enter up to 255 characters in this field.
Language	Enter the user's language. For example, `en-IN`. You can enter up to 255 characters in this field.
Address	Enter the user's full address. You can enter up to 64000 characters in this field.

Field Name	Description
Phone Number	Enter the user's phone number. You can enter up to 255 characters in this field.

5. Click **Save**.

    The Conga IDP user receives a Welcome email that includes the username, the first-time login password, and organization information. The user can generate a new password using the default first-time login password.

Newly created users are in an active state by default. Based on the Timezone, Locale, and Currency selections, the Positive Currency Format, Negative Currency Format, Short Date Format, Log Date Format, Time Format, Decimal Symbol, Digit Group, Digit Grouping Symbol, and Negative Number Format information will be added to the new user. All of these fields can be changed while editing the user.

Activating or Deactivating Users

An administrator can activate or deactivate existing users from the user details page. Users can be granted role-based activation and deactivation access. A deactivated user cannot log in to the Conga Platform Administration portal.

To activate or deactivate a user

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher () icon from the top-left corner and go to **Admin Console** > **Users.**
   A list of users is displayed.
3. Click the More () icon next to the user name and select **Activate** or **Deactivate**.

Setting Up Wet Signatures

You must set up wet signature integration to allow users to use the Wet Signature option when sending documents for signatures. By default, the Wet Signature option is set to default and active.

To set up Wet Signature

1. Click the app launcher ( ).
2. In the left panel, under Admin Apps, click **Integrations**.
3. In the eSignature API Connections tab, click **Edit** for WetSignature under the Action column.
4. Select **Default Option for Signature** to make WetSignature the default option while sending documents for signature.
5. Select **Active** to make the WetSignature option available for selection while sending documents for signature.
6. Click **Save**.

Configuring the Approval Workflow

This section provides the workflow and the sequence of actions you must define to enable Approvals.

To configure Approvals, you must establish a sequence of approvals, each step of which enacts predefined rules.

To access Approvals, click the App Launcher icon ( ) and select **Approvals** from Shared Apps. You can view the following tabs.

- **Approval Flows** describe how to build the sequence of steps that compose an approval flow. From this screen, you can find and select approval flows for creating, reviewing, or editing approval flows For more information, see Approval Flows.
- **Approval Rules** describe how to define approval rules. Approval rules are used to associate business objects and entry criteria to determine which assignees are required during the approval workflow. Administrators can create rules for use in child processes. For more information, see Approval Rules.

Approval Flows

An approval flow serves as the framework for your approval request, providing options for setting up key objects like entry criteria. Approval flows consist of reviewers and rules that are applied in the defined order. See Approval Rules for more on these predefined criteria.

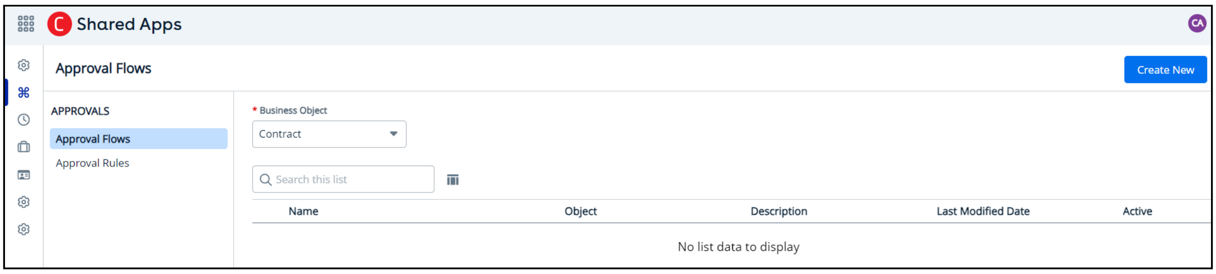
To access the approval flows

1. Click the App Launcher icon ( ).
2. Select **Approvals** from Shared Apps.

To create an approval flow

> Fields marked with * are mandatory.

1. On the **Approval Flows** tab, select **Contract** from the **Business Object** drop-down menu.



2. Click **Create New** to create a new approval request. The New Approval window appears.
3. Enter the following details:

Field	Description
Process Name *	Enter the process name
Object *	Select an object from the **Object** drop-down menu
Description	Enter the description

4. Click **Create** to create a new approval flow in Draft status. The Approval Flows page appears. You can view the following three tabs on the Approvals Flows page.
   - Setup
   - Settings
   - Details
5. On the **Setup** tab, click **Step Name**. The UPDATE STEP window appears.
   a. Enter the following details:

Field	Description
Step Name *	Specify the step name.
Step Description	Enter the description.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Step Type *</td><td>Select one of the following types. Depending on the type selected, different fields are displayed.

Standard: Enter the following details to create parent objects:

Assignee Type*: Select the assignee type from the drop-down menu.
Assignee*: Search and select the assignee.
Assignee Description: Enter a description of the assignee.
Step Auto Complete: Enter values for the user when the authorization or review is presented to them.
Send Email: Check this box to send the approver an email.
Notify Only: Notify the recipient of the approval step with no call to action.
Skip Unresolved Assignee: Check this box to allow the approval flow to continue when an assignee cannot be reached.

Child Process: Child process requires a preconfigured rule to be available for inclusion before you can configure them.

Context Object*: Select Agreement Line Item from the Context Object drop-down menu.
Approver Rule*: Assign one approver rule. Enter the name of the rule you will apply here. Rule name auto-completion begins when you enter three characters.

Sub Process: Sub-process requires a preconfigured rule to be available for inclusion before you can configure them.

Approver Rule*: You must assign one approver rule. Enter the name of the rule you will apply here. Rule name auto-completion begins when you enter three characters.

</td></tr>
<tr><td>Step Level Comments</td><td>Flip the Step Level Comments toggle to enable reviewers to make comments when they interact with this step in the approval flow.</td></tr>
</table>

Field	Description
Carbon Copy	You can find user names in the **Carbon Copy** (cc) field to nominate notification recipients.
Step Dependencies	You can shape the flow using the **Step Dependencies** field to select a dependency that must be fulfilled before a given step can occur. A step dependency is a step that must be completed before the present (dependent) step becomes active. If a flow is established without dependencies, all flow steps occur simultaneously. Using this logic, you can give two different steps a common dependency to make them occur at the same stage (parallel processes) in a flow.

b. When you have completed the flow, click **Save**. This displays the popup “A Standard step has been created”.

c. To apply conditional logic to a step, click the More icon ( ) and select **Add Condition**.

6. On the **Settings** tab, you can enter the details in the following tabs.

Tab	Description
Entry Criteria	You can specify minimum approval conditions. Entry criteria are used to define the conditions that must be met before an object record is routed through the approval flow. For example, to specify that a certain approval flow for contracts is only used when the contract value exceeds $100,000. a. Select a field to use in the filter criteria. b. Select an operator from the drop-down menu. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field. c. Enter the value of the field. The type of value field depends on the field selected. d. To add additional conditions, click **Add Criteria** and repeat steps a, b, and c. e. Click **Save** to save the approval criteria. This displays the popup "The (process name] process has been saved."

Tab	Description
Notifications	This tab displays the following options. Specify the notification templates that are used when an approval request is emailed to an approver or a reviewer. You can specify the following email templates or leave the fields empty to use the default templates: • Assignment Email Template: Use this to notify users they must decide on an approval request. • Reassignment Email Template: Use this to notify users that an approval request task initially assigned to them has been reassigned to someone else. • Escalation Email Template: Use this when auto-escalation is enabled, and an outstanding approval task is auto-escalated. • Cancellation Email Template: Use this to notify users when an approval process has been canceled. • Notify Only Email Template: Use this when you select the Notify Only option in one of the steps. The recipient of this email has no action items. • Reminder Email Template: Use this when automatic reminders are set up and awaiting action.
Comments	Turn on the following settings based on the requirement. • Submission Comments Mandatory: The user must comment when submitting the request. • Approval Comments Mandatory: The user must comment when approving a request. • Rejection Comments Mandatory: The user must comment when rejecting a request. • Recall Comments Mandatory: The user must comment when recalling an approval process.
Other Settings	This tab displays the following options. • Consolidate Approvals • Consolidate Notifications • Continue Pending Approvals on Reject • Backup Admin User

<table>
<tr><th>Tab</th><th>Description</th></tr>
<tr><td>Update Actions</td><td>This tab displays the following sections.

Initial Submission Actions: An action performed on a contract when submitted for approval.

<ol type="a">
Select a field name to use in the filter criteria.
Enter the value of the field. The type of value field depends on the field selected.
Enter the description in the description field.
To add additional conditions, click Add Action and repeat steps a, b, and c.
Click Save.

To transition the workflow to the In Approvals stage on the contract details page after submitting an approval, ensure you enter the following initial submission actions.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Approval Indicator</td><td>Pending Approval</td></tr>
<tr><td>Status category</td><td>In Authoring</td></tr>
<tr><td>Status</td><td>Language Approval</td></tr>
</table>

Final Approval Actions: Final actions enable you to update contract fields in the object when the approval process is approved.

<ol type="a">
Select a field name to use in the filter criteria.
Enter the value of the field. The type of value depends on the field selected.
The value of the Approval Indicator field must be set to Approved.
Enter the description in the description field.
To add additional conditions, click Add Action and repeat steps a, b, and c.
Click Save.

</td></tr>
</table>

<table>
<tr><th>Tab</th><th>Description</th></tr>
<tr><td></td><td>
For example, to update the status category and status on the contract details page after the contract is approved, ensure you enter the following final approval actions.

<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Approval Indicator</td><td>Approved</td></tr>
<tr><td>Status category</td><td>In Signature</td></tr>
<tr><td>Status</td><td>Ready for Signatures</td></tr>
</table>

Final Rejection Actions: Final actions enable you to update contract fields in the object when the approval process is rejected.

a. Select a field name to use in the filter criteria.
b. Enter the value of the field. The type of value depends on the field selected.

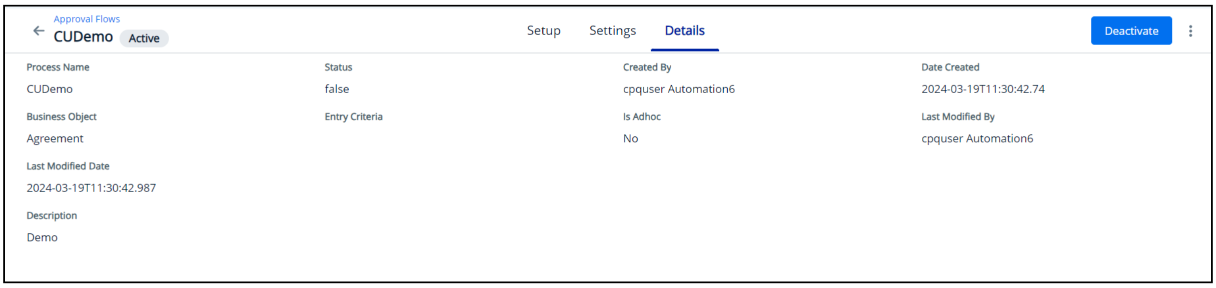
The value of the Approval Indicator field must be set to Rejected.

c. Enter the description in the description text box.
d. To add more conditions, click Add Action and repeat steps a, b, and c.
e. Click Save.

For example, to update the status category and status on the contract details page after the contract is rejected, you can enter the following final approval actions.

<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Approval Indicator</td><td>Rejected</td></tr>
<tr><td>Status category</td><td>In Authoring</td></tr>
<tr><td>Status</td><td>Author Contract</td></tr>
</table>
</td></tr>
</table>

7. On the **Details** tab, you can view the details you entered.
8. Click **Activate** to activate the approval criteria. This displays the popup "The (process name) process has been activated". The process is now **Active**.



You can now preview and submit the approval request. For more information, see Preview and Submit.

Approval Rules

Approval rules encapsulate logical, causal decision points to develop your approval flows. Rather than the one-step, one-reviewer rule for standard flow steps, approval rules enable you to adopt decision points requiring multi-party decisions, which you can define as Unanimous, Majority, Percent, and Quorum. Rules are also reusable.

To access the approval rules

1. Click the App Launcher icon ( ).
2. Select **Approvals** from Shared Apps.
3. Select the **Approval Rules** tab.

To create a new approval rule

Fields marked with * are mandatory.

1. Click the **Create New** button at the top right.
2. Enter the following details.

Field	**Description**
Rule Name *	Enter a name for the rule.

Field	Description
Business Object *	Select a business object type from the **Business Object** drop-down menu. • Opportunity • Contract • Proposal • Product Configuration • Line Item • Contract Clause • Contract Line Item
Rule Type *	Select a rule type from the drop-down menu. The available options are: • Condition (a logical state) • Dimension (a critical value)
Sequence *	Select an order for the rule's occurrence by entering an integer from the stepper in the field
Approval Policy *	Pick an approval policy from the Approval Policy drop-down menu. The available policies are: • **Unanimous:** All reviewers must approve. One dissent is a veto. • **Majority:** More than half of the reviewers must approve. It is best to establish an odd number of reviewers to prevent tie votes. For an even number of reviewers, tie votes result in rejection. Select the **Continue Policy Approval on a Reject** check box to let approvers continue to decide after the designated number of approvers has approved or rejected an approval request. • **Percent:** A specific percentage of approvers is necessary to approve. If you select a percentage of approvers who approve, use the **Approval Percent** stepper to select the required approval percentage. • **Quorum:** A specific number of approvers is necessary to approve. If you select a specific number of approvers who approve, use the **Approval Count** stepper to select the required number of approvers.

Field	Description
Description	Enter the description
Active	Slide the **Active** toggle to make the approval rule active.
Rule criteria	Select a field name from the **Field Name** drop-down menu, assign it a logical operator, and provide an appropriate value to create a testable rule. For example, select the Quantity field type from the **Field Name** drop-down menu, assign a "greater than or equal to" logical operator, and enter a numeric value to compare against to qualify a rule. Click **Add criteria** to add another approval rule.

3. When you're done creating an approval rule or adding a rule entry, click **Save**. This displays the popup "New approval rule has been created."

To edit an existing approval rule

1. Select the business object from the Business Object drop-down menu.
2. Find the rule in the Approval Rules table.
3. Click the Rule name link.
4. On the **Details** tab, modify the approval rule values as described in To create a new approval rule.
5. After editing the details, click **Save**.

To edit rule conditions

For each rule, you can add rule conditions that determine when and whether the rule is enforced.

1. Select the business object from the Business Object drop-down menu.
2. Find the rule in the Approval Rules table.
3. Click the Rule name link.
4. On the **Rule Entries** tab, click the Rule Entry field. The Rule Entry window appears.
5. Enter the following details.

Field	Description
Rule Entry: Enter the following details	
Label *	Enter the label for the rule entry name.
Description	Enter the description.
Depends on	Set a rule entry that is dependent on another rule entry. For example, if you want to set a rule entry (for example, rule entry 2) depending on another rule entry (for example, rule entry 1), you can set the value 1 in the **Depends on** field.
Assignee: Enter the following details	
Approver Type *	Select the approver type from the drop-down menu.
Approver *	Search and select the approver.
Depends on	Set an approver dependent on another approver.
Approval Settings	
Auto Complete	Slide this toggle to enter values for the user when the authorization or review is presented to them.
Notify Only	Slide this toggle to notify the recipient of the rule entry with no call to action.
Send Email	Slide this toggle to send the approver an email.
Skip Assignee	Slide this toggle to allow the rule entry to continue when an assignee cannot be reached.

6. When you have modified the rule conditions as desired, click **Save** to save your changes.

To delete a rule

1. Select the business object from the **Business Object** drop-down menu.
2. Find the rule from the Approval Rules table.

3. Click the More icon (⋮) and select **Delete**.
4. On the Delete Rule window, click **Delete**. This displays the popup "(Rule name) rule has been deleted".

Syncing Data between Salesforce and Conga Platform for CLM

You can follow the configurations mentioned in this topic to automatically sync data from Salesforce to Conga Platform for CLM to maintain data consistency across platforms.

> ⓘ This section covers configurations related to syncing data from Salesforce to the Conga Platform for Contract Lifecycle Management (CLM). For detailed information on the data sync process between Salesforce and Conga Platform, see Managing Data Sync.

Perform the following tasks to sync data from Salesforce to Conga Platform for CLM:

- Configure Salesforce Settings in Conga Platform.
- Configure CLM Config Settings in Conga Platform.
- Configure a Salesforce authentication provider to log in to CLM on Conga Platform using Salesforce credentials.
- Configure the APTS_RLPInstanceSettings admin entry.
- Configure remote site settings.
- Configure triggers to sync the out-of-the-box objects to CLM on Conga Platform.

To configure Salesforce Settings in Conga Platform

For more information, see Salesforce Settings.

To configure CLM Config Settings in Conga Platform

For CLM, you must only configure CLM Config Settings in the Custom Settings. For more information, see Custom Settings.

To configure a Salesforce authentication provider

1. Go to Setup > Identity > Auth. Providers.
2. Click **New** and set Provider Type as **Open ID Connect**.
3. Enter the Name as APTS_RLPInstanceSettings.
4. Enter Consumer Key, Consumer Secret, Authorize Endpoint URL , and Token Endpoint URL. For information on how to fetch the Consumer Key, Consumer Secret, and Token Endpoint URL, see Platform Settings. Leave the remaining fields as is.

> **Note**
>
> Enter the region-specific Authorize Endpoint URL:
> **For example:**
> **Preview Environment:**
> NA: https://login-rlspreview.congacloud.com/api/v1/auth/connect/token
> EU: https://login-preview.congacloud.eu/api/v1/auth/connect/token
> AU: https://login-preview.congacloud.au/api/v1/auth/connect/token
> **Production Environment:**
> NA: https://login-rls.congacloud.com/api/v1/auth/connect/token
> EU: https://login.congacloud.eu/api/v1/auth/connect/token
> AU: https://login.congacloud.au/api/v1/auth/connect/token

5. Click **Save**.

To configure the admin entry

1. Click the **App Launcher** icon ( ), enter Admin, and select Admin.
2. Click **New**.
3. Enter the following details:

Field	Value
Name	APTS_RLPInstanceSettings

Field	Value

Code	Sample value:
	{
	"fwd_sync_url" :"https://xxx.congacloud.io",
	"organization-id":"5ba45b1e-2264-4063-be5f-xxxxxxxxxxx",
	"organization-fid":"datatenant-clmst1-5ba86b1e-2268-4062-be9f-xxxxxxxxx",
	"user-id":"9743f384-c18c-4455-bfaa-xxxxxxxxxx"
	}
	ⓘ Enter the region-specific fwd_sync_url.
	For example,
	NA: https://rls-preview.congacloud.io
	EU: https://rls-preview.congacloud.eu
	AU: https://rls-preview.congacloud.au

For more information, see Admin Entries.

To configure remote site settings

1. Go to Setup > Security > Remote Site Settings.
2. Click **New Remote Site**.
3. Enter the following details:
    a. **Remote Site Name**: Enter a remote site name.
    b. **Remote Site URL**: Enter the remote site URL.

    > ⓘ You must enter the URL that you provided in the Authorize Endpoint URL field.

    c. **Disable Protocol Security**: Leave the checkbox unselected.
    d. **Description**: Enter a description.
    e. **Active**: Select the checkbox.
4. Click **Save & New**.
5. Enter the following details:
    a. **Remote Site Name**: Enter a remote site name.
    b. **Remote Site URL**: Enter the remote site URL.

> ⓘ You must enter the URL that you provided for fwd_sync_url in the APTS_RLPInstanceSettings admin entry.

   c. **Disable Protocol Security**: Leave the checkbox unselected.
   d. **Description**: Enter a description.
   e. **Active**: Select the checkbox.
6. Click **Save**.

To configure triggers

1. Go to Setup > Object Manager.
2. Select the **Agreement** object.
3. Click **Triggers** > **New**.
4. In the Apex Trigger window, select the **Is Active** checkbox.
5. Enter the following code.

```
trigger AgreementDualWriteTrigger on Apttus__APTS_Agreement__c (after insert,
after update, after delete)
{ Conga_4SF.CongaDualWriteUtils.initiateDualWrite(); }
```

6. Go to Setup > Object Manager.
7. Select the **Attachment** object.
8. Click **Triggers** > **New**.
9. In the Apex Trigger window, select the **Is Active** checkbox.
10. Enter the following code.

```
trigger AttachmentDualWriteTrigger on Attachment(after insert, after update,
after delete) { Conga_4SF.CongaDualWriteUtils.initiateDualWrite(); }
```

11. Go to Setup > Object Manager.
12. Select the **ContentDocumentLink** object.
13. Click **Triggers** > **New**.
14. In the Apex Trigger window, select the **Is Active** checkbox.
15. Enter the following code.

```
trigger ContentDocumentLinkDualWriteTrigger on ContentDocumentLink(after
insert, after update, after delete)
{ Conga_4SF.CongaDualWriteUtils.initiateDualWrite(); }
```

You can configure additional objects to sync data. For more information see Admin Entries to Sync Data between Salesforce and Conga Platform for CLM.

CLM Admin Setup

Select one of the following topics:

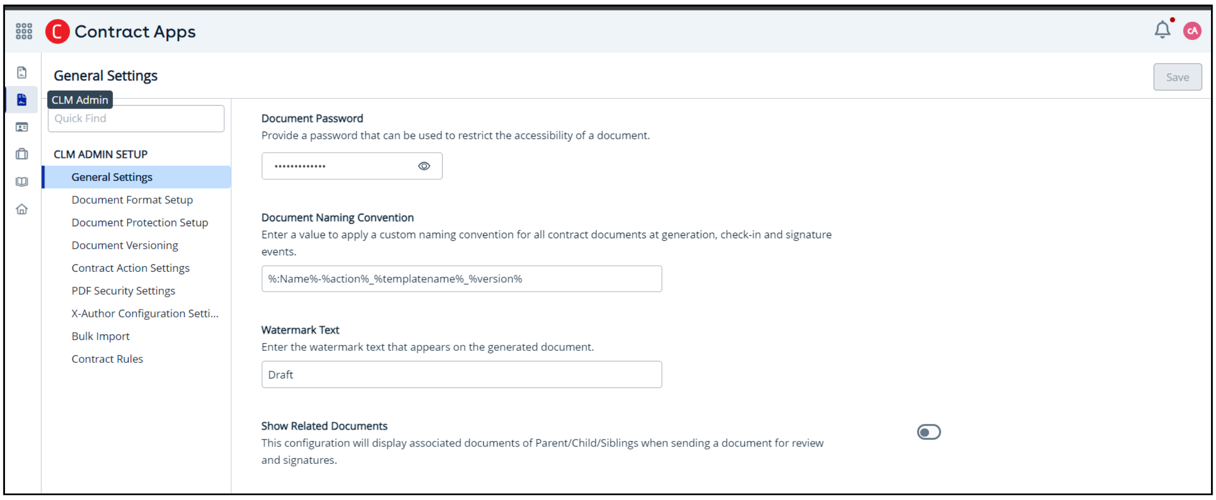
- General Settings
- Document Format Setup
- Document Protection Setup
- Document Versioning
- Contract Action Settings
- PDF Security Settings
- X-Author Configuration Settings
- Bulk Import
- Contract Rules

General Settings

You can configure settings that are required to manage a contract life cycle.

To configure general settings

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Click the CLM Admin ( ) icon from the left pane.
3. Under **CLM ADMIN SETUP**, select **General Settings.**



4. Update the following settings as required and click **Save**.

Setting	Description	Sample Value
Document Password	Enter a password to restrict document access.. By default, the password is masked. Click the eye icon ( ) to view the password characters.	`Conga#123`

Setting	Description	Sample Value
Document Naming Convention	Enter a value to apply a custom naming convention for documents generated as a result of the following actions. • Generate Document • Re-generate Document • Check-in (from X-Author for Contracts) • Finish O365 Review • Upload Signed Documents after wet signature • Intelligent Document Import	`%:Name%_%:RecordType%_%:ExecutedDate%_%action%_%timestamp%_%version%_%:ParentAgreement.Name%_%:PrimaryContact.Name%`

Setting	Description	Sample Value
	• Generate Supporting Document You can specify the Contract object field names in the sequence to be included in the document name. You must preface all field names, except the following, with a colon: You must preface lookup-field names with a colon and also suffix .Name to it. For example: %:`ParentAgreement`.Name`%` The following field names must be specified without a colon prefix. • contractname • action • templatename • date • checkintype • version	

Setting	Description	Sample Value
Watermark Text	Enter the watermark text that appears on the document generated, regenerated or previewed. The output displayed on performing "Preview" action contracts always show "Draft" as the watermark text, irrespective of the text specified in Watermark Text field.	`Confidential`
Show Related Documents	Toggle this button on to show a list of parent, child, or sibling documents in the Related Documents tab when users send agreements for simple review, Microsoft 365 review, or for signatures.	NA

Setting	Description	Sample Value
Editable Contract Number for Contract Request Form	Toggle this button on to edit the contract number when creating a contract request. By default, this setting is turned off, preventing edits to the contract number.	NA
Restrict Editing after Activation	Toggle this button on to prevent users from modifying any contract records, including amended or renewed ones, once the contract is activated. By default, this setting is turned off, allowing users to edit contract records and their amendments or renewals.	NA

Setting	Description	Sample Value
Contract Number	Prefix: Enter a unique identifier for categorization and easy reference to essential contract details. Sequence Padding: Add leading zeros to contract numbers for consistent formatting and easy sorting. You can add up to 20 zeros in the Sequence Padding field.	Prefix: `CONGA2023` Sequence Padding: `000000`

Document Format Setup

Documents can be set up to enable you to specify the output format when you generate a document. In some cases, you may want to restrict these options.

You can set up company-wide default formats for creating contract documents at the User Role and Contract Type levels. Supported formats are DOCX, PDF, and PDF/A. If you select the User Selection option, you allow the user to select a format during contract document generation.

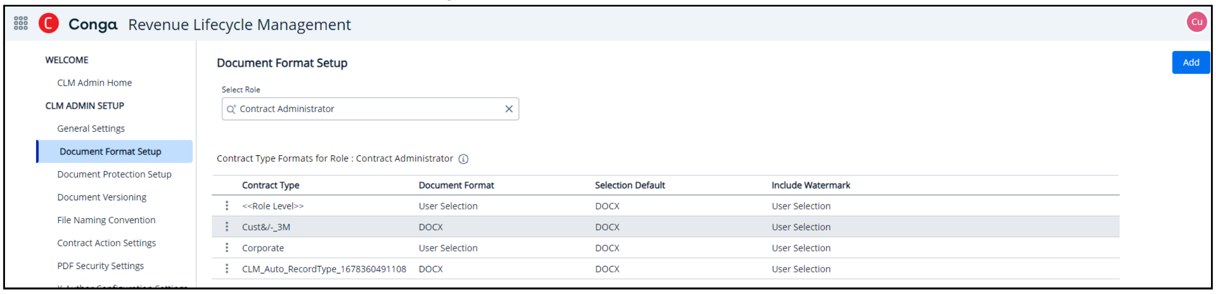
Document format setup allows you to set the default document format and watermark options in the "Select a template" popup that appears when a user generates a contract document from a template. You can define role-level document format setup. You can also overwrite the role-level setup by defining contract type-specific exceptions.

To configure document format

1. Click > Admin Settings > CLM Settings > Document Format Setup.
2. Enter a role in the Select Role search box and select the role from the dropdown.

> ⓘ The Contract Administrator role is selected by default.

All document format setups for Admin are displayed. The following screenshot shows the Document Format Setup page.



3. Click the **Add** button.
   The Add Document Format popup is displayed.
4. On the Add Document Format popup:
   a. In the Contract Type dropdown, select a contract type.
   b. In the Document Format dropdown, select **DOCX**, **PDF**, or **PDF/A** document format to restrict the document output format type or select **User Selection** to allow users to select the desired document output format.
   c. In the Document Action dropdown, select the actions on which this format is applicable.

   > **Note**
   >
   > For actions other than the ones selected in the document action dropdown, the following default format options will be displayed to the users when they perform the document action in the contract:
   >
   > | Document Format | Selection Default | Include Watermark | Selection Default for Watermark |
   > |---|---|---|---|
   > | User Selection | DOCX | User Selection | FALSE |

   d. If you selected User Selection in the previous step, the Selection Default dropdown is enabled. Select **DOCX**, **PDF**, or **PDF/A** to set a default document output format option when a user generates a contract document.
   e. In the Include Watermark dropdown, select **User Selection** to allow users to selected whether the watermark should be displayed or not, at the time of performing the document action. Select **Always** to apply a watermark whenever users perform document actions.

f. If you selected User Selection in Include Watermark dropdown, the Default Watermark dropdown is enabled. Select **True** to display the Include Watermark checkbox as selected by default at the time of document action. The users can override the default selection if you have selected User Selection in Include Watermark dropdown.

5. Click **Save**.
   A document format is added.

To edit a document format

1. Click the More icon (⋮) for a contract type and select **Edit**.
   The Add Document Format popup is displayed.

   > ⓘ If both the <Role Level> contract type and a particular contract type document format are set up, the contract-type document format setup takes precedence.

2. Make the necessary changes and click **Save**.

Document Protection Setup

You can restrict changes to contract documents for specific roles by making the documents read-only or enabling Track Changes in MS Word to capture any updates to the document.

For example, the **Read Only** protection level provides read-only access, while the **Insert Comments and Track Changes Only** level captures modifications made to the document generated by a specific user. In this case, a System Administrator can specify that a user with the Sales role is allowed full document access when generating or re-generating a document, but **Track Changes** is enabled when the user sends a document for review.

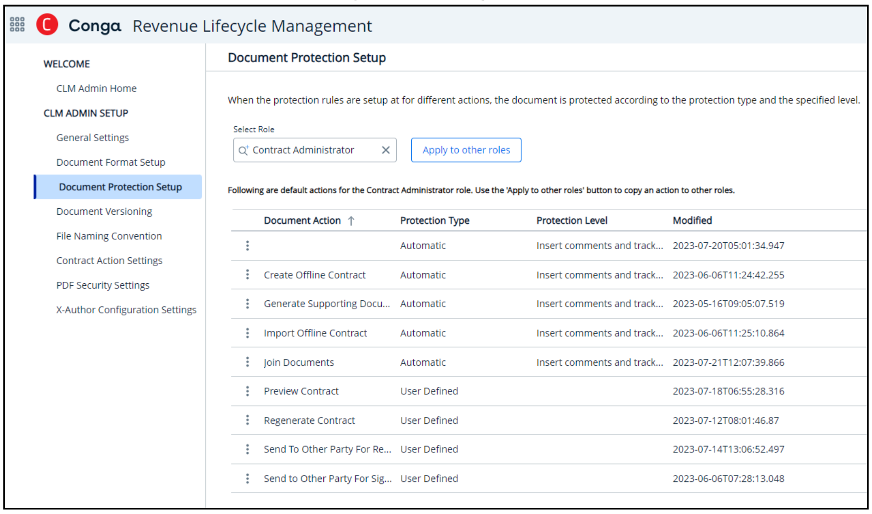
When the protection levels are set up for different actions, the document is protected according to the protection type and the specified level.

You can view the protection type configured for different document actions for Contract Administrator and Contract Standard User roles.

You cannot configure protection setup for Generate Supporting Document and Regenerate actions. User Defined option is not applicable for Create Offline Contract and Import Offline Contract actions.

To configure document protection

1. Click >Admin Settings > CLM Settings > Document Protection Setup.
2. In the Select Role search box, Contract Administrator is selected by default and you can view the protection type configured for different document actions.



To edit a document protection setting

1. On the Document Protection Setup page, click the More icon ( ) for a document action and select **Edit**.
2. Select one of the following Protection Types:
   a. **User Defined**: This option allows users to select the desired document protection. You can select the default protection level which the users can change at the time of performing an action on the contract document.
   b. **Automatic:** With this option, the protection level must be selected at configuration time.

> **Note**
>
> Following are the protection levels for the user defined and automatic protection types:
>
> - Full access: This option provides complete access to a user's role to perform the selected action.
> - Insert comments and tracked changes only: This option allows a user's role to insert comments in the contract document along with tracking the changes made by any other user.

- Insert comments only: This option allows a user's role to insert only comments in the contract document.
- Fill in form fields only: This option allows a user's role only to fill in only the form fields inside the contract document.
- Read only: This option gives only read access to the user.

c. **Unprotect:** With this option for the selected action, the password-protected document can be unprotected for certain actions, provided the password is the same as the one set in the Document Password setting. For more information, see General Settings.
d. **Ignore:** With this option, protection settings can be bypassed.

3. Click **Apply**.

To apply an existing protection type to another role

1. On the Document Protection Setup page, click ⋮ for a document action and select Apply to other roles to apply a document action to a role.
   or
   Click the **Apply to other roles** button to apply all available document actions to a role.
2. In the Select roles to apply settings popup, select roles.
3. Click **Apply**.

Related topics

- Protecting and Unprotecting a Document in X-Author for Contracts
- Locking and Unlocking Documents in X-Author for Contracts

Document Versioning

You can control the versioning of documents when specific actions are performed on the contract.

To configure document versioning

1. Go to CLM ADMIN.
2. Under CLM ADMIN SETUP, click **Document Versioning**.
   You can update the following settings.

Setting	Description
Document Regenerate	This property determines the increment value when regenerating a document using the same template (Regenerating with a different template will always reset the counter).
Check-In Final	This property determines the increment factor when a document is checked in as Final.
Check-In with Redlines	This property determines the increment factor when a document is checked in with redlines.
Check-In without Redlines	This property determines the increment factor when a document is checked in without redlines.
Initial Version	This property sets the initial version number of a newly generated or uploaded document.

Contract Action Settings

Select one of the following topics:

- Defining Clone Specifications
- Clone Types

Defining Clone Specifications

The clone specifications feature automates configuration-based object cloning. If a relevant clone specification is configured and available, it is invoked when a user clones, amends, or renews a contract. You can define clone specifications to override the system's default process for cloning, amending, and renewing a contract.

The system initially searches for any configuration available in the below format. If any configuration is available, then cloning is processed based on the available configuration. Otherwise, it looks for the default cloning and copies the entire agreement object to a new one.

The following table lists the configuration name format for a clone specification and related examples.

Configuration Name Format	Example	Description
clonespec::{sourceObject}::{targetObject}::{recordType}::{cloneType}	`clonespec::agreement::agreement::msa::clone`	This performs only the clone operation for the MSA record type.
clonespec::{sourceObject}::{targetObject}::{cloneType}	`clonespec::agreement::agreement::amend`	This performs only the amend operation.
clonespec::{sourceObject}::{targetObject}	`clonespec::agreement::agreement`	This performs clone, amend, and renewal operations.

Clone specification is omitted for the following system fields.

- Id
- CreatedBy
- CreatedDate
- ModifiedBy
- ModifiedDate
- ActivatedBy
- ActivatedDate
- AgreementNumber
- Status
- StatusCategory

> - If you clone an agreement, the value of StatusCategory and Status fields of source agreement is **Unchanged**.
> - If you amend or renew an agreement, the value of StatusCategory of the source agreement is **In Effect**.
> - If you amend or renew an agreement, the value of Status of the source agreement is **Being Amended** and **Being Renewed** respectively.

The system automatically populates the values for the following field types. The clone specifications configuration cannot control these fields.

- Autonumber
- Calculated fields
- Rollup fields

Clone Types

These clone types are available.

- AllFields
- CustomFields
- IncludeFields

For more information, see Clone Types.

To configure a clone specification

1. Click the App Launcher icon ( ) and select CLM Admin.
2. Click **Contract Actions Settings** tab.
3. Click **Add** to display the Add Config popup.
4. Enter a configuration name in the **Name** field. For more information, see Configuration Format Name.
5. In the code block, enter the clone specification code in JSON format.

Sample Clone Specification

```
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
    "IncludeFields": {
        "Name": "$$Name + -Clone",
        "AccountId": "$$AccountId",
        "Owner": "$$Owner",
        "RecordType": "$$RecordType"
    },
    "ExcludeFields": [
        "ContractNumber",
        "ContractStartDate",
        "ContractEndDate"
    ]
}
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
    "IncludeFields": {
        "Name": "$$Name + -Amend",
        "AccountId": "$$AccountId",
        "Owner": "$$Owner",
        "RecordType": "$$RecordType"
```



```
    },
    "ExcludeFields": [
        "ContractNumber",
        "ContractStartDate",
        "ContractEndDate"
    ]
}
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
    "IncludeFields": {
        "Name": "$$Name + -Renew",
        "AccountId": "$$AccountId",
        "Owner": "$$Owner",
        "RecordType": "$$RecordType",
    },
    "ExcludeFields": [
        "ContractNumber",
        "ContractStartDate",
        "ContractEndDate"
    ]
}
```

6. Click **Save**.

Configuring Clone Specification For System Object

The system object **AgreementClause** is completely handled by the internal system. If you use the system object AgreementClause in clone specification, then the cloning process considers CloneType as "AllFields" and omits the elements in “IncludeFields” and “ExcludeFields”.

Sample clone specification

```
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
        “IncludeFields“ : {
                "Name": "$$Name + -Clone"
```

```
        }
    "ChildObject": [
        {
            "SourceObject": "AgreementClause",
            "TargetObject": "AgreementClause",
            "FromField": "Agreement",
            "ToField": "Id"
        }
    ]
}
```

You cannot use the following system objects in clone specification.

- DocumentMetadata
- User
- Role
- ObjectPermission

Configuring Parent-Child Relationship

When you clone an object, you must also clone all its related objects. The clone specification allows you to configure parent-child relationships.

Example 1: Sample clone specification: parent and child object relationship through a lookup field

```
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
    "IncludeFields": {
        "Name": "$$Name + -Clone",
        "AccountId": "$$AccountId",
        "Owner": "$$Owner",
        "RecordType": "$$RecordType"
    },
    "ChildObject": [
        {
            "SourceObject": "AgreementClause",
            "TargetObject": "AgreementClause",
            "FromField": "Agreement.Id",
            "ToField": "Id",
            "CloneType": "IncludeFields"
```

```
                "IncludeFields": {
                    "Name": "$$Name + -Clone",
                    "Action": "$$Action",
                    "Category": "$$Category",
                    "Agreement": "#PARENT#"
                }
            }
        ]
}
```

#PARENT# stores the LookupObject of the parent object.

Example 2: Sample clone specification: parent and child object relationship through a reference field

```
{
    "SourceObject": "Agreement",
    "TargetObject": "Agreement",
    "CloneType": "AllFields",
    "IncludeFields": {
        "Name": "$$Name + -Clone",
        "AccountId": "$$AccountId",
        "Owner": "$$Owner",
        "RecordType": "$$RecordType"
    },
    "ChildObject": [
        {
            "SourceObject": "AgreementClause",
            "TargetObject": "AgreementClause",
            "FromField": "Agreement",
            "ToField": "Id",
            "CloneType": "IncludeFields"
            "IncludeFields": {
                "Name": "$$Name + -Clone",
                "Action": "$$Action",
                "Category": "$$Category",
                "Agreement": "#PARENTID#"
            }
        }
    ]
}
```


ⓘ "#PARENTID#" stores the ID of the parent object

The following table describes the child objects in a parent-child relationship.

Child Object	Description
SourceObject	Name of the source object for the child.
TargetObject	Name of the target object for the child.
FromField	Key column of the child object which represents the relationship with the parent.
ToField	Key column of the parent object which represents the relationship with the child.
Format1 : "{TargetFieldName}" : "#PARENT#"	The lookup reference of the parent object is stored in the field "Agreement" of the target object. For example: "Agreement" : "#PARENT#"
Format2 : "{TargetFieldName}" : "#PARENTID#	The value of the field "Id" from the parent object is copied into the field "Agreement" of the target object. For example: "AgreementId" : "#PARENTID#"

Clone Types

The following are the three types of cloning:

- **AllFields**
  - All fields from the source object are cloned except the fields specified in ExcludeFields.
  - Fields specified in the IncludeFields are cloned as per the specification. All other fields are cloned by matching the field name from the source and target object.
  - Any calculated fields, Rollup fields and Auto popup fields such as "id", "createdby", "createddate", "modifiedby", "modifieddate", "externalid" are omitted.
- **CustomFields**
  - All custom fields from the source object are cloned except the fields specified in ExcludeFields.

    - Fields specified in the IncludeFields are cloned as per the specification irrespective of whether those fields are custom or not.
    - Any calculated fields, Rollup fields, and Auto popup fields such as "id", "createdby", "createddate", "modifiedby", "modifieddate", and "externalid" are omitted
    - Any fields from the source object other than the above fields are omitted.
- IncludeFields
    - Only the fields specified in the IncludeFields list are cloned.
    - All other fields are omitted.

Format	Example	Description
“{TargetFieldName}” : “$${SourceFieldName}”	“Name” : “$$Name“	Value of the field “Name” from the source object will be copied into the field “Name” of the target object.
“{TargetFieldName}” : “$${SourceFieldName}”	“Name” : “$$Description“	Value of the “**Description**” field from the source object is copied into the “**Name**” field of the target object.
{TargetFieldName}” : ”Static value”	“Status” : “Request“	Static value “**Request**” is copied into the “**Status**” field of the target object.
“{TargetFieldName}” : “$${SourceFieldName} + Static value”	“Name” : “$$Name + Clone“	Static value “**Clone**” is appended to the value of the “**Name**” field from the source object and then the result will be copied into the “**Name**” field of the target object.
“{TargetFieldName}” : ”Static value + $${SourceFieldName}”	“Name” : “Copy of - $$Name“	Static value “**Copy of**” will be prepended to the value of the field “**Name**” from the source object and then the result is copied into the “Name” field of the target object.

Format	Example	Description
“{TargetFieldName}” : “$$${ContextFieldName}”	“ExecutedDate” : “$$$CURRENT_DATE”	Current date is copied into the **ExecutedDate** field of the target object.
“{TargetFieldName}” : “$$${ContextFieldName} + {Number}"	“ExecutedDate” : “$$$CURRENT_DATE + 1”	One day is added to the current date and the result is copied into the **ExecutedDate** field of the target object. This arithmetic operation works only if the context field type is either number or date.
“{TargetFieldName}” : “$$${ContextFieldName} - {Number}”	“ExecutedDate” : “$$$CURRENT_DATE - 3”	Three days are deducted from the current date and the result is copied into the **ExecutedDate** field of the target object. This arithmetic operation works only if the context field type is either number or date.

Context Fields

The clone specification feature supports the below list of context fields

Format	Example
CURRENT_DATE	Current date and time as 00:00:00
CURRENT_DATE_TIME	Current date and current time
CURRENT_MONTH	Current month number
CURRENT_MONTH_STARTDATE	Starting date of current month
CURRENT_MONTH_ENDDATE	End date of current month
CURRENT_YEAR	Current year number

Format	Example
CURRENT_ORG	ID of current context organization
CURRENT_USER	LookupObject of current context user

ⓘ Source and target object names, field names and context field names are case sensitive.

PDF Security Settings

You can enforce security on a PDF document by enabling or disabling certain restrictions.

To configure PDF security

1. Go to CLM ADMIN.
2. Under CLM ADMIN SETUP, click **PDF Security Settings**.
   You can update the following settings. Enabling these settings allows users to perform the actions in the Description column.

Setting	Description
PDF Security	Apply security settings to PDF documents and protect them with a password.
Printing	Print a PDF file.
Copying	Make a copy of a PDF file.
Commenting	Comment on a PDF file.
Filling of Forms	Fill forms in a PDF file.
Merging of PDF Documents	Merge multiple PDF files.
Edit PDF Content	Change the content in a PDF file.

X-Author Configuration Settings

You can enable or disable X-Author-specific features for the CLM users working on contract documents in X-Author.

To configure X-Author settings

1. Go to CLM ADMIN.
2. Under CLM ADMIN SETUP, click **X-Author Configuration Settings**.
   You can update the following settings. Enabling these settings allows users to perform the actions in the Description column.

Setting	Description
Auto Enable PDF For Final Docs	Toggle this button on to display the Create PDF Attachment checkbox as selected, when users choose Save as Final - to be signed option during document check-in.
Allow PDF Selection Override	This setting is applicable when Auto Enable PDF For Final Docs is selected. Toggle this button on to allow users to override the Create PDF Attachment checkbox default setting when they choose Final- to be signed during document check-in.
Auto Enable Reconciliation	Toggle this button on to display the Reconcile Document checkbox as selected during document check-in.
Allow Reconcile Selection Override	This setting is applicable when Auto Enable Reconciliation is selected. • If Auto Enable Reconciliation is selected and Allow Reconciliation Selection Override is selected, the **Reconcile** checkbox is by default selected during document check-in. The users <u>can</u> deselect (override) the **Reconcile** button. • If Auto Enable Reconciliation is selected and Allow Reconciliation Selection Override is deselected, the **Reconcile** checkbox is by default selected during document check-in. The users <u>cannot</u> deselect (override) the **Reconcile** button. • If Auto Enable Reconciliation is deselected, the users can select or deselect the **Reconcile** checkbox during document check-in. However, the **Reconcile** checkbox is disabled if there is no smart field in the document.

Setting	Description
Auto Enable Private Indicator	Toggle this button on to display Make this document private checkbox as selected, by default.
Allow Private Selection Override	This setting is applicable only when the Auto Enable Private Indicator toggle button is on. Toggle this button on to allow the users to override default selection for Make this document private checkbox.
Auto Enable Asynchronous Check-in	Toggle this button on to display Asynchronous Check-in checkbox selected by default in the X-Author Contracts during document check-in.
Allow Regenerate	Toggle this button on to display the **Regenerate** button on the X-Author toolbar to allow users to regenerate an contract document from a selected template with the values updated in the contract record.
Unlock Smart Elements	Toggle this button on to allow the users to delete smart elements from the generated document.
Hide Content Control Border	Toggle this button on to hide smart boundaries (for smart fields and clauses) in generated documents.
Allow Highlights Field	Toggle this button on to enable the Highlight Fields feature to highlight smart and read-only fields in contract documents.
Asynchronous Checkin Recipient	Select a recipient role (Contract Owner, Logged in XAC user or Both) to receive Asynchronous Check-in email notification. **Supported Values**: Contract Owner, Logged in XAC user, or Both **Default Value**: Both
X-Author Add-in Load Type	Select a load type for the X-Author for Contracts add-in. Select Centralized if users install the X-Author for Contracts 2.0 add-in using Centralized Deployment through the Office 365 Admin Center. Select Appsource if users access the X-Author for Contracts 2.0 add-in through the Microsoft Store.

Setting	Description
Restrict Checkin of Documents	Select the contract status categories and statuses to restrict check-in and check-out of documents from X-Author for Contracts.

Bulk Import

You can import bulk data for the following objects to Conga CLM application :

- Accounts
- Contracts
- Contacts

The bulk data import process involves the following steps:

1. **Downloading a template for the object:** The system provides a template for each object type to populate the data to be imported. A template comprises columns corresponding to the database fields required for inserting data for the object type.
2. **Uploading the data:** You need to fill in the data to be imported into the template .CSV file for the relevant object and then upload the file.

To download a template

1. Launch CLM Admin and click **Bulk Import** in the left-hand navigation.
2. Click the **Templates** tab. Names and descriptions of the objects supported for bulk import are displayed.
3. Select the checkbox corresponding to the object name to download the template.

   > ⓘ You can download templates for multiple objects simultaneously by selecting all the required objects.

4. Click **Download Template** > **Download as .CSV**
5. A new window to save the compressed (zip) folder (containing the template) to your computer is displayed.
6. Browse and select the desired location. Click **Save**. The template is saved at the selected location.

   > ⓘ If you selected multiple objects for template download, a single compressed folder named 'Templates' is generated. You can extract the folder to get template files for each object.

To upload the data

Prerequisites

- A .CSV file with the data to be imported is available.
- For the lookup fields, you have provided Id values to uniquely identify the record. For example, for accounts, you have specified values for Account.Id and not just the values for Account.Name.

1. Click the **Data** tab.
2. Click **Upload Data**.
3. Select the file that contains the data to be imported.

   > You can upload multiple .CSV files for the same or different objects at a time.

4. Click **Upload**.

A record is created for the file uploaded and is assigned Queued status. The record is assigned InProgress status when the conga-contracts-batch-worker processes it. Click the circular arrow ( ) icon to refresh the file status.

The record is assigned Completed status if the data from the file is successfully created in the application. Else, it is assigned Failed status. Click information ( ) icon and download ( )icon to to view and download the error log, respectively.

You can download the file with the data by clicking the filename.

To download the file error log

You can download error log of a file that has been processed i.e. a file with Completed or Failed status.

1. Click the **Data** tab.
2. Select the **Filename** checkbox.

   > **Note**
   >
   > You can select multiple files at a time.

3. Click the download ( ) icon.
4. Save As dialog box is displayed. Select the location and click **Save**.

> **Note**
>
> If you selected multiple files, the Save As dialog box is displayed separately for each file.

The error log is downloaded at the selected location in .CSV format.

To delete a file

You can delete a file that has been processed i.e. a file with Completed or Failed status.

1. Click the **Data** tab.
2. Select the **Filename** checkbox.

   > **Tip**
   >
   > You can select delete multiple files together. Select checkboxes for the files to be deleted.

3. Click the delete ( ) icon.
4. Click **Delete** to confirm deletion of the file.

The file is deleted from the system and no longer displayed in the list.

Contract Rules

Contract rules can be used to fulfill contract creation requests when the requestor does not have permission to generate contract documents. Contract rules enable the system to determine how a contract should be processed when a requestor raises a new contract request.

Contract rules can be configured to auto-generate contract documents or assign the contract to a user group for further processing. The following is an example of a contract request process for which contract rules can be configured:

- The requester creates a contract record and clicks Submit Request.
- Based on the information provided by the requester, the system determines if the contract should be processed as a standard self-service contract or as a non-standard contract requiring authoring and negotiations.
- For a standard contract, the system generates a contract document and sends it as an email attachment to the contract's primary contact. The requester obtains the signatures on the contract document, scans the hard copy, and attaches it to the contract record. Clicking Activate puts the contract in effect.

- For a non-standard contract, the contract is assigned to a preconfigured user group. The user group takes ownership of the contract, authors it, and negotiates it with the other party. The requester obtains the signatures on the contract document, scans the hard copy, and attaches it to the contract record. Clicking Activate puts the contract in effect In Effect.

For more information about contract rule use cases and how contract rules work, see Use Case for Contract Rules. Also see Submitting a Document Generation Request.

This section describes how to configure contract rules with one or more inclusion criteria and filter criteria to define the conditions to process contract requests.

To create a Contract Rule

1. Go to CLM ADMIN.
2. Under CLM ADMIN SETUP, click **Contract Rules**.
3. Click **New Rule**.
4. Enter the following information:
    a. Enter the contract rule name in the **Name** field.
    b. Slide the **Is Active** toggle button to make the rule active.
    c. Enter a value in the **Sequence Number** field. The sequence number defines the order in which the contract rule is executed.
    d. Select the rule type, as described in the following table:

Rule Type	Description	Used in Submit Request Mode
Contract Template	This parameter identifies the contract template for automatic contract document generation.	Auto
Email Template	This parameter identifies the template for an email sent to predefined recipients as an attachment to the contract document.	Auto
User Group	This parameter is used to select the user group that contract ownership is transferred to in order to process the contract request.	Manual

Rule Type	Description	Used in Submit Request Mode
Submit Request Mode	When set to Auto, this parameter mode triggers automatic contract document generation. If this parameter is set to Manual, the next contract rule with the same sequence is executed.	Not applicable

   e. Enter a value in the **Rule Value** field.
   f. **Description**: Enter a description for the rule.
5. Click **Save**.

To configure a contract rule

1. Click the **Rule Configuration** tab for the contract rule.
2. In the Inclusion Criteria section, select the field and expressions to use as entry criteria for the contract record to be submitted for processing. Click **Add Criteria**.
   a. Select a field from the Field drop-down list.
   b. Select an operator from the **Operator** drop-down list. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
   c. Enter the value of the field. The type of value field depends on the field selected.
   d. To add another criteria, click **Add Criteria** and repeat steps 2 (a), (b), and (c). A formula is displayed in the Filter Expression textbox showing the criteria added. You can also alter the filter expression. AND and OR operators are supported in the filter expression.
3. In the Filter Criteria section, select fields and expressions to control the visibility of contract records when inclusion criteria are met. Click **Add Criteria**.
   a. Select a field from the Field drop-down list.
   b. Select an operator from the **Operator** drop-down list. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
   c. Enter a value. The type of value is defined by the field selected.
   d. To add another criterion, click **Add Criteria** and repeat steps 3 (a), (b), and (c). A formula is displayed in the Filter Expression textbox showing the criteria added. You can also alter the filter expression. AND and OR operators are supported in the filter expression.
4. Click **Save**.

To edit a contract rule

1. Click the Contract Rule link to open the contract rule.
2. Click **Edit**.
3. Edit the details and click **Save**.

To clone a contract rule

1. Click the Contract Rule link to open the contract rule.
2. Click the More icon (⋮) and select **Clone** for the contract rule to be cloned. This displays the "Contract rule cloned successfully." popup. A copy of the cloned contract rule is created with "Clone" suffixed to its name.
3. Click **Edit** to modify the rule information.
4. Click **Save**.

To delete a contract rule

You can delete a contract rule from the contract rule list.

1. Click the **More** icon (⋮) in the row you will delete and select **Delete**.
2. Click **Confirm.**

The contract rule is deleted.

Use Case for Contract Rules

The Submit Request feature for a contract allows contract requestors to raise a new contract request. Contract rules enable the automation of processing the contract requests submitted by the requestors.

The administrator can define rules to identify if:

- a contract document should be automatically generated after the contract is submitted for processing
- the contract should be sent to a user group for reviewing and processing the contract

The following are some requirements for which contract rules can be configured to automate the contract request process:

- If the record type is NDA, the system should generate a contract document automatically with a predefined template and send the document as an email attachment to the contract's primary contact.
- If the contract is other than NDA and needs review and negotiation with the other party, the system should assign it to the legal team.
- If the record type is NDA but contains non-standard legal language, the system should assign it to the legal team for review.
- If the Total Contract Value exceeds $5000, the system should assign it to the legal team for review.

Contract rules can be configured with one or more conditions to determine how a contract should be processed.

Let's take a use case to understand how contract rules work.

Use Case

For a contract of type NDA with Non Standard Legal Language checkbox not selected, contract document should be automatically generated. But, if the NDA contract has Non-Standard Legal Language checkbox selected, the document should not be generated, and the contract should be forwarded to the legal team for review. Additionally, if the non-standard contract is with ACME International account, it should be forwarded to a the account-specific legal team.

To achieve the above use case, you need to configure contract rules as shown in the table below:

Contract Rule #	Sequence	Rule Type	Rule Value	Inclusion Criteria	Filter Criteria
1	1	Submit Request Mode	Auto	Record Type Equals NDA	NonStandardLegalLanguage Equals false
2	1	Agreement Template	<contract template name>		

Contract Rule #	Sequence	Rule Type	Rule Value	Inclusion Criteria	Filter Criteria
3	1	Email Template	<email template name>		
4	2	Submit Request Mode	Manual	Record Type Equals NDA	NonStandardLegalLanguage Equals true
5	2	User Group	<user group for ACME International account>	Record Type Equals NDA	• NonStandardLegalLanguage Equals true • Account Equals ACME International
6	2	User Group	<general user group>	Record Type Equals NDA	• NonStandardLegalLanguage Equals true • Account NotEqualTo ACME International

Now let's see, how the contract rules are executed depending on the contract information.

Scenario1: The requestor creates an NDA contract with Non Standard Legal Language checkbox not selected.

- The inclusion criteria for all the contract rules configured above are satisfied.
- The system evaluates the contract against the filter criteria configured. It determines that the contract matches the filter criteria configured for Submit Request Mode rule of type Auto.
- The Submit Request Mode rule of type Auto is triggered.
- All the rules configured with the sequence same as that of Submit Request Mode rule of type Auto are triggered.

As a result of the above, a contract document is generated with the template selected in agreement template rule. The contract document is sent in an email using the email template rule.

Scenario2: The requestor creates an NDA contract with Non Standard Legal Language checkbox selected for ACME International account.

- The inclusion criteria for all the contract rules configured above are satisfied.
- The system evaluates the contract against the filter criteria configured. It determines that the contract matches the filter criteria configured for Submit Request Mode rule of type Manual.
- The Submit Request Mode rule of type Manual is triggered.
- All the rules configured with the sequence same as that of Submit Request Mode rule of type Manual are triggered.

As a result of the above, the contract owner is changed to account specific user group selected in the user group rule.

Customizing CLM using Custom Actions

Conga CLM enables you to introduce custom actions in the application to fulfill business requirements otherwise not achieved through out-of-the-box actions. You can add a custom action button in the contract details page header to perform either of the following functions:

Action Function	Purpose
Navigate	To navigate the user to the URL specified in the Params field when the user clicks the custom action button. For example, • launch a Conga application or a third-party application • trigger an API • launch Conga Approvals application from Contract Details
Execute Workflow	To execute a workflow configured in the Conga Platform, when the user clicks the custom action button.
Execute Custom Code	To execute a code written in Custom Code in the Conga Platform, the user clicks the custom action button.

You can also set visibility or validation rules for page header actions, page tabs, sections within a detail page, and fields. You can configure rules such as:

- If a user enters a currency value, they must select a currency type, or the system displays an error message.
- For contracts of type MSA, display the "Additional Information" section.
- If the contract number is not provided, display an error message in the contract number field.

- Display or hide custom actions on the UI based on defined rule criteria such as user role.

> ⚠ You can add custom action buttons in the Contract Details page (in the page header only) and the Clause List page (in the grid only).

Pre-requisites

- You have configured the required workflow or custom code in the Conga Platform. For more information see, Managing Workflows or Managing Custom Code.

To add a custom action button in Contract Details page

1. Navigate to My Contracts and open a contract.
2. Click **Edit Page**. The page layout for the contract type that is edited is displayed in Cx Studio.

3. Click on the page header in the layout. The Properties popup appears with two tabs: Details and Rules.
4. Go to the Details tab to manage actions and click **Add Action** button. The New Actions window appears.

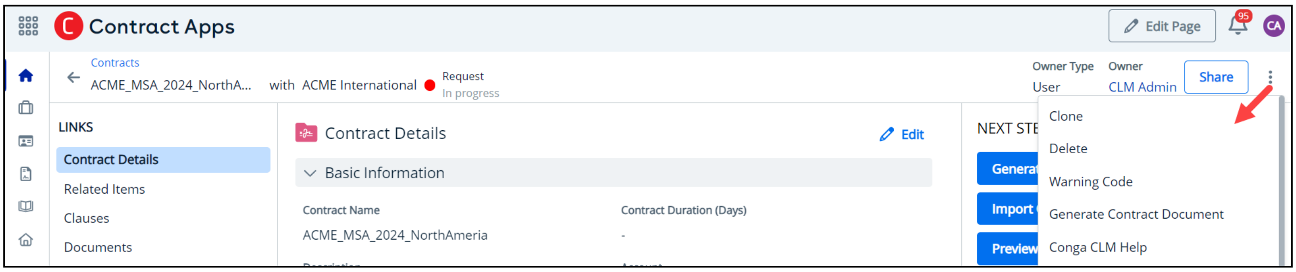
Field	Description
Action Name	Enter the name of the action as per your business needs.

Field	Description
Action Function	Select the name of the action function where you want to redirect the user when the action button is clicked. • Navigate: Redirects the user to a different screen. • Execute Workflow: Performs operations as defined in the workflow. • Execute Custom Code: Executes operations as defined in custom code.

Params	Enter the parameter relevant to the selected action functions. Use the syntax as shown in the example below:
	Navigation URL
	`Format to navigate to the external page: url:https://<page URL>/`
	`Sample: url:https://documentation.conga.com/`
	
	`Format to navigate within the application: url:/<path after the domain name>`
	`Sample: url:/workflow`
	
	Workflow ID
	`Format to execute workflow: id:{workflowid}`
	`Sample: id:6c803fb3-29b0-48d9-9873-90964d65430a`
	
	Custom API URL
	`Format: method:<method name>, resourceName:<Custom Code project name>,url: response`
	`Sample: method:post,resourceName:codeExecution,url:response`

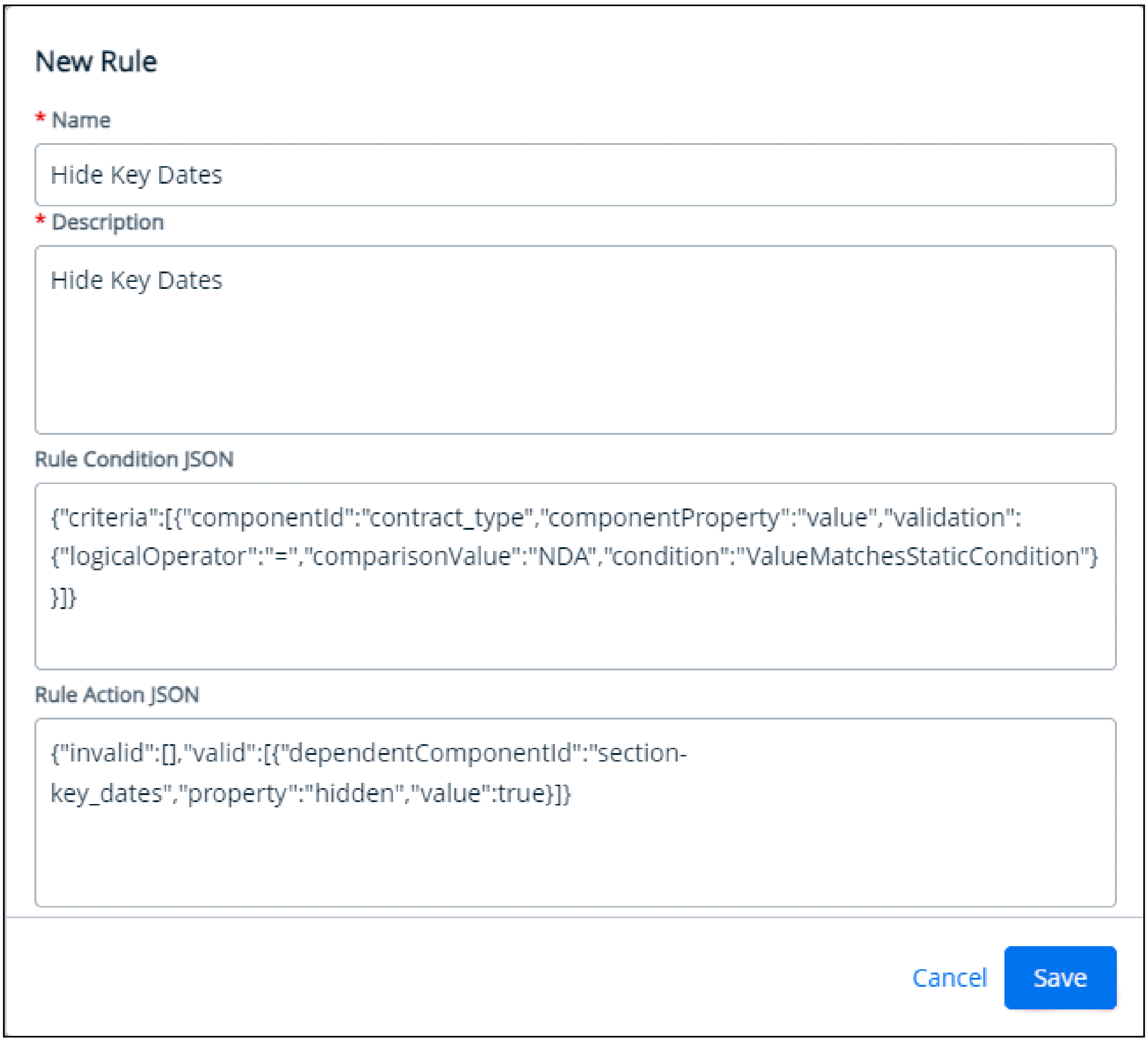
5. Use Rules tab to set visibility or validation rules for the action button. To learn more about applying rule, see Adding Rules to a Custom Action Button.
6. Click **Publish** to apply changes.

The custom action button added to the page header will be displayed in the kebab menu. The custom action buttons are displayed for a contract depend on its type depending on the contract type and the page layout configured for it.



To add a rule

1. Log in to the Conga Platform as an admin user.
2. Click the App Launcher ( ) icon from the top-left corner > Apps > CX Studio.
3. The properties popup appears with two tabs: Details and Rules.
   - To add a rule to an action, click the PageHeader pane.
   - To add a rule to a section or field of the record detail page, click on the Record Detail View pane. If there are multiple tabs on the detail page, select the tab you want to work with, and then make your selection.
4. Go to Properties window and click Rules tab.
5. You can access add rules in the following ways. Click a link to view steps:
   - using JSON format
   - Advanced Rule Edit
6. Click Add Rule. The New Rule window lets you define rule conditions and actions using JSON format.



You can either define the rule's conditions and actions in JSON or leave these fields blank, save the rule, and then define the criteria using the Advanced Rule Editor UI.

Field	Description
Name	Enter the rule's name.
Description	Enter a description for the rule you want to define.

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="5">Rule Condition JSON and Rule Action JSON</td><td colspan="2">Insert the rule condition criteria in JSON format.</td></tr>
<tr><th>Rule Condition JSON</th><th>Rule Action JSON</th></tr>
<tr><td colspan="2">Example: Adding a Rule to the Action button in the page header

To restrict access to the "customcode" action button for users with the admin role, add the following rule condition and action criteria in JSON format:</td></tr>
<tr><td><pre>
{
    "criteria": [{
        "componentId": "c
os-page-header",
        "validation": {
            "condition":
"CustomCondition",
            "validationFu
nc": "function (payload)
{\n const userRole =
payload.userInfo?.Role;\n
return (userRole?.Name ??
'') === 'Admin';\n}"
        }
    }],
    "logicalExpression":
""
}
</pre></td><td><pre>
{
    "valid": [{
        "ruleFunc": "function (payload)
{\nconst props = {};\nprops.items =
payload.element.actionBar.actions.map(\n(it
em) => {\nif (item.key === 'customcode')
{\n   item.hidden = true;\n}\n
return item;\n}\n);\nreturn props;\n}"
    }],
    "invalid": [{
        "ruleFunc": "function (payload)
{\nconst props = {};\nprops.items =
payload.element.actionBar.actions.map(\n(it
em) => {\nif (item.key === 'testaction_1')
{\n   item.hidden = true;\n}
\nreturn item;\n   }\n   );\n
return props;\n}"
    }]
}
</pre></td></tr>
<tr><td colspan="2">Example: Show or hide section on the record details page.

Hide the "Key Dates" section on the record details page only for NDA or MSA agreement record types. Display this section for all other agreement record types.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>

```
{
  "criteria": [
    {
      "componentId": "RecordType",
      "componentProperty": "value",
      "validation": {
        "logicalOperator": "=",
        "comparisonValue": "NDA",
        "condition": "ValueMatchesStaticCondition"
      }
    },
    {
      "componentId": "RecordType",
      "componentProperty": "value",
      "validation": {
        "logicalOperator": "=",
        "comparisonValue": "MSA",
        "condition": "ValueMatchesStaticCondition"
      }
    }
  ],
  "logicalExpression": "1 OR 2"
}
```

```
{
  "valid": [
    {
      "dependentComponentId": "section-key_dates",
      "property": "hidden",
      "value": true
    }
  ],
  "invalid": [
    {
      "dependentComponentId": "section-key_dates",
      "property": "hidden",
      "value": false
    }
  ]
}
```

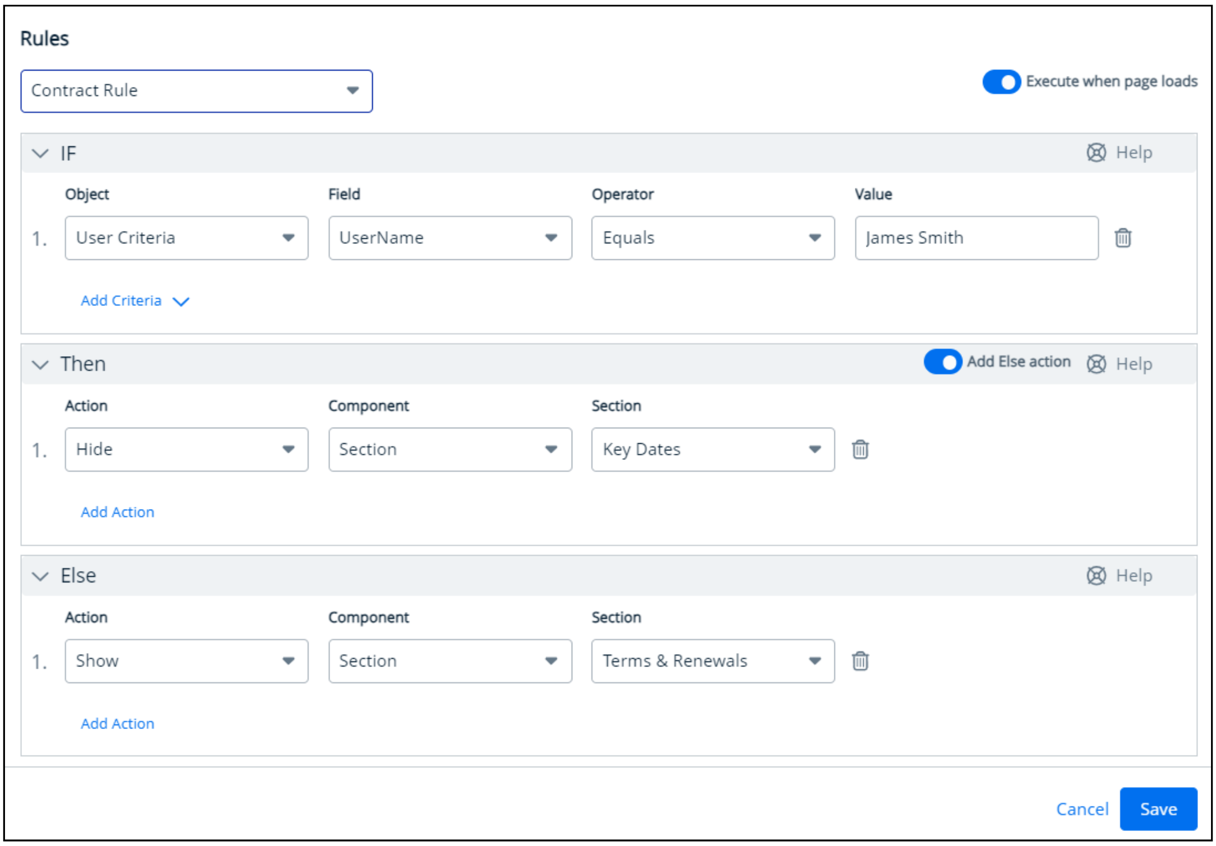
</td></tr>
</table>

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="2"></td><td colspan="2">Example: Show or Hide tab in the multi tab detail page.
To implement the same rule using the Advanced Rule Editor UI, see Controlling Tab Visibility using Rule Editor UI.

Consider a layout with two tabs: "Main Details" and "Terms & Renewals." Define the rule criteria as follows:
• If the contract name in the "Main Details" tab is "Conga," the "Terms & Renewals" tab will be hidden.
• If the contract name is anything other than "Conga," the "Terms & Renewals" tab will be visible.</td></tr>
<tr><td>{
  "criteria": [
    {
      "componentId": "Name",
      "componentProperty": "value",
      "validation": {
        "logicalOperator": "=",
        "comparisonValue": "Conga",
        "condition": "ValueMatchesStaticCondition"
      },
      "type": "Field",
      "id": "ui-rule-criteria-1724651467104363089216487876"
    }
  ],
  "logicalExpression": "(1)"
}</td><td>{
  "valid": [
    {
      "dependentComponentId": "tab-2",
      "property": "hidden",
      "value": true,
      "dependentParentId": "agreement_tabs"
    }
  ],
  "invalid": [
    {
      "dependentComponentId": "tab-2",
      "property": "hidden",
      "value": false,
      "dependentParentId": "agreement_tabs"
    }
  ]
}</td></tr>
</table>

7. Click **Save**.
8. To define rule criteria from the UI, click Advanced Rule Edit. The Rules window appears as below if you have an already configured rule, either through JSON format or

Advanced Rule Edit.



If you are configuring a rule for the first time, the Rule list and Execute when page loads toggle is not displayed.

9. All defined rules are listed in Rule dropdown. Select the rule you wish to work on.

Execute when page loads	Enable this toggle to apply the defined rule criteria at the time of page loading.

IF	- Click **Add Criteria** and then select Field Criteria option to create or manage a condition criteria for fields or select User Criteria to define criteria involving logged-in user info. - Field - Field dropdown options are populated based on the selected object. Select the field you want to set as the condition criterion. - Operator - You must select the logical operator from the picklist. This forms the relationship between the field and its value. - Value - The value field changes based on the selected operator options. Enter or select the value for the specified field. **Example: Multiple Criteria**

	{
	    "criteria": [
	        {
	            "componentId": "Name",
	            "componentProperty": "value",
	            "validation": {
	                "logicalOperator": "!=",
	                "comparisonValue": "Test",
	                "condition": "ValueMatchesStati
	cCondition"
	            }
	        },
	        {
	            "componentId": "StatusCategory",
	            "componentProperty": "value",
	            "validation": {
	                "logicalOperator": "=",
	                "comparisonValue": "Request",
	                "condition": "ValueMatchesStati
	cCondition"
	            }
	        },
	        {
	            "componentId": "RecordType",
	            "componentProperty": "value",
	            "validation": {
	                "logicalOperator": "=",
	                "comparisonValue": "Corporate",
	                "condition": "ValueMatchesStati
	cCondition"
	            }
	        },
	        {
	            "componentId": "AgreementNumber",
	            "componentProperty": "value",
	            "validation": {
	                "logicalOperator": "=",
	                "comparisonValue": "123",
	                "condition": "ValueMatchesStati
	cCondition"
	            }
	        }
	    ],

	• Filter Expression: By default, the application uses AND logic for all criteria. However, you can modify this to fit your needs and create nested logical expressions if desired. For example, 1 AND 2 AND (3 OR 4).
Then	Click Add Action to create or manage an action that executes when the condition criteria are met.
Else	Click Add Action to create or manage an action that executes when the condition criteria are not met.
Add Else action	Enable this toggle to set up an Else action that follows the Then action. The Else panel will become available once you enable this option.
Delete ( )	Removes expression.

10. Find the new rule under the Rules tab. Toggle the switch at the end of the rule name to activate it.
11. To edit, delete or clone the rule, click the more ( ) icon at the end of the rule and select an appropriate option.
12. Click **Publish** to apply the rule to the page.

The rule is applied when the contract matches the criteria specified in the rule.

To add a custom action button in Clause List page

1. Click the App Launcher ( ) icon from the top-left corner > Apps > CX Studio.
2. Click **Object Layouts** ( ) icon and click the more ( ) icon in the row with Application Name, Entity Type and Page Type is CLM, agreement-clause, and clauselist, respectively.
3. Click **Edit Metadata**.
4. This opens JSON Editor. Add custom actions by editing the JavaScript.
5. Click **Save**.

The custom action button added though the JavaScript will be displayed in the Clause List page. Once add a custom button, you can add action function (Navigate, Execute Workflow, Execute Custom Code) to the button through CX Studio by editing the Clause List page.

Use Cases To Add Custom Action Buttons

Let's take a few examples to understand how custom action can be added to achieve different use cases:

Use Case	High-level Activities To Be Performed
On clicking Help button, redirect the user to Conga Documentation Portal.	Edit Contract Details page layout and add an action with the following details: **Action Name:** Help **Action Function:** Navigate **Params:** < `Conga Documentation Portal URL` >
On clicking Apply Discount button, check if the total contract value greater than $50000. If yes, apply 5% discount on the total contract value. But, if the Account Name is ACME International, then hide the Apply Discount button.	Create a custom button as below: 1. Develop a custom code to execute the business logic. Deploy the custom code project and import it to Conga Platform. 2. Edit Contract Details page layout and add an action with the following details: **Action Name:** Apply Discount **Action Function:** Custom Code **Params:** < `method:post,resourceName:TotalContractValue,url:response` > Add a rule in the custom button as below: Rule Condition

Use Case	High-level Activities To Be Performed
On clicking Query Contract Documents	1. Develop a custom code to call the /api/clm/v1/contracts/{contractId}/documents/querywithreview api. 2. Deploy the custom code project and import it to Conga Platform. 3. Edit Contract Details page layout and add an action with the following details: **Action Name:** Query Contract Documents **Action Function:** Custom Code **Params:** < >

Customizing CLM Using Callbacks

Callback methods provide a mechanism to execute custom actions at different stages in the contract management process. The following methods are available for different objects:

Object Name	Method	Signature	Purpose
Agreement	AfterCreateAsync()	AfterCreateAsync( )	This method executes custom logic after creating a contract.
Agreement	AfterStoreExecutedDocumentAsync()	AfterStoreExecutedDocumentAsync(IContractLifecycleDocumentRequest contractLifecycleDocumentRequest)	This method executes custom logic after the executed document is uploaded to the contract record for activation and further lifecycle stages, such as amendment or renewal.

Object Name	Method	Signature	Purpose
Agreement	AfterImportOfflineDocumentAsync()	AfterImportOfflineDocumentAsync(IContractLifecycleDocumentRequest contractLifecycleDocumentRequest)	This method executes custom logic after importing an offline document to the contract record.
Agreement	AfterCreateOfflineDocumentAsync()	AfterCreateOfflineDocumentAsync(IContractLifecycleDocumentRequest contractLifecycleDocumentRequest)	This method executes custom logic after creating an offline contract from a third-party paper through Conga X-author.
Agreement	AfterActivateSync()	AfterActivateSync(IContractLifecycleRequest contractsLifecycleRequest)	This method executes custom logic after activating a contract.
Agreement	AfterAmendAsync()	AfterAmendAsync(IContractLifecycleRequest originalContractsLifecycleRequest, IContractLifecycleRequest amendmentContractsLifecycleRequest)	This method executes custom logic after amending a contract.
Agreement	AfterRenewAsync()	AfterRenewAsync(IContractLifecycleRequest originalContractsLifecycleRequest, IContractLifecycleRequest renewalContractsLifecycleRequest)	This method executes custom logic after renewing a contract.
Agreement	AfterCancelAsync()	AfterCancelAsync(IContractLifecycleRequest contractsLifecycleRequest)	This method executes a custom logic after canceling a contract.
Agreement	AfterExpireAsync()	AfterExpireAsync(IContractLifecycleRequest contractsLifecycleRequest)	This method executes a custom logic after a contract expires.

Object Name	Method	Signature	Purpose
Agreement	AfterTerminateAsync()	AfterTerminateAsync(IContractLifecycleRequest contractsLifecycleRequest)	This method executes a custom logic after terminating a contract.
Agreement	AfterCloneAsync()	AfterCloneAsync(IContractLifecycleRequest originalContractsLifecycleRequest, IContractLifecycleRequest cloneContractsLifecycleRequest)	This method executes a custom logic after cloning a contract.
Agreement	AfterUpdateAsync()	AfterUpdateAsync(ILifecycleActionCallbackRequest lifecycleActionCallbackRequest)	This method executes a custom logic after editing a contract.
Agreement	AfterDeleteAsync()	AfterDeleteAsync(ILifecycleActionCallbackRequest lifecycleActionCallbackRequest)	This method executes a custom logic after deleting a contract.
Agreement	BeforeCreateAsync()	BeforeCreateAsync(IBeforeLifecycleActionCallbackRequest beforeLifecycleActionCallbackRequest)	This method executes a custom logic before creating a contract.
Agreement	BeforeUpdateAsync()	BeforeUpdateAsync(IBeforeLifecycleActionCallbackRequest beforeLifecycleActionCallbackRequest)	This method executes a custom logic before updating a contract.
Agreement	BeforeDeleteAsync()	BeforeDeleteAsync(ILifecycleActionCallbackRequest lifecycleActionCallbackRequest)	This method executes a custom logic before delete a contract.

You can implement callback methods using one or more of the following options:

Using Telemetry Traces

Telemetry Traces allows you to trace complex operations from the custom code. You can add it as a child span of the custom code execution operation. The traces are available in Grafana tempo.

Using LogHelper

You can use LogHelper to log required information from the custom code. The log information is available in Grafana traces at runtime. At the time of authoring, these logs are available under console output tab in authoring UI callback edit screen.

To write logs in callbacks,

1. Get the Log Helper
2. Log any of the supported level log message for example: logHelper.LogInformation or logHelper.LogDebug etc

The following methods are available in LogHelper class:

- void LogCritical(string message);
- void LogDebug(string message);
- void LogDebug(object obj);
- void LogError(string message);
- void LogInformation(string message);
- void LogTrace(string message);
- void LogWarning(string message);

Using DataHelper

DataHelper allows querying the object data. It can also be used to add, update, delete object records, which can be custom or product objects, from custom code.

Using HttpHelper

HttpHelper enables HTTP communication from custom code to third-party services. External service endpoints must be in the Trusted-API configuration to allow external communication from HttpHelper.

Example 1:

The below code uses the DataHelper and adds telemetry log information to the contract's Description field on contract creation.

```
using System;
using System.Linq;
using Conga.Platform.Extensibility.CustomCode.Library;
using System.Collections.Generic;
using System.Threading.Tasks;
```

```
using Conga.Contracts.Common.Callback;
using Conga.Contracts.Common.Callback.Messages;
using CallbackTest;

namespace CallbackTest
{
    /// <summary>
    /// Contracts lifecycle Callback
    /// </summary>
    public class TestContractLifecycleCallback : CodeExtensibility,
IContractLifecycleCallback
    {
        public async Task AfterCreateAsync(ILifecycleActionCallbackRequest
lifecycleActionCallbackRequest)
        {
            var traceHelper = GetTelemetryHelper();
            using var span =
traceHelper.StartActiveSpan($"{nameof(TestContractLifecycleCallback)}.
{nameof(this.AfterActivateAsync)}");
            span?.AddLog($"AfterCreateAsync
{lifecycleActionCallbackRequest.ContractId}");
            var dataHelper = GetDataHelper();
            Dictionary<string, object> contract = new()
                {
                    {"Id", lifecycleActionCallbackRequest.ContractId },
                    {"Description", "Contract is created Successfully and ID= " +
lifecycleActionCallbackRequest.ContractId }
                };
            await dataHelper.UpdateAsync("Agreement", contract);
            await Task.CompletedTask;
        }
    }
}
```

Example 2:

The below code adds telemetry log information to check if RecordType is "CAF". If RecordType is CAF, then AgreementCategory cannot be null. If AgreementCategory is null, then CLM shows an `AgreementCategory is required.` message.

```
using System;
```



```
using System.Linq;
using Conga.Platform.Extensibility.CustomCode.Library;
using System.Collections.Generic;
using System.Threading.Tasks;
using Conga.Contracts.Common.Callback;
using Conga.Contracts.Common.Callback.Messages;

namespace CallbackTest
{
    /// <summary>
    /// Contracts lifecycle Callback
    /// </summary>
    public class TestContractLifecycleCallback : CodeExtensibility,
IContractLifecycleCallback
    {
        public async Task<ICallbackResult>
BeforeCreateAsync(IBeforeLifecycleActionCallbackRequest
beforeLifecycleActionCallbackRequest)
        {
            bool success = true;
            string message = "";
            var traceHelper = GetTelemetryHelper();
            using var span =
traceHelper.StartActiveSpan($"{nameof(TestContractLifecycleCallback)}.
{nameof(this.BeforeCreateAsync)}");
            Dictionary<string, object> contract =
beforeLifecycleActionCallbackRequest.Contract;
            if (contract != null &&
           contract.TryGetValue("RecordType", out var RecordType) &&
           RecordType?.ToString() == "RecordType1" &&
           (!contract.TryGetValue("AgreementCategory", out var AgreementCategory) ||
AgreementCategory == null))
            {
                success = false;
                message = "AgreementCategory is required.";
            }
            ICallbackResult result = new CallbackResult(success, message);
            return await Task.FromResult(result);
        }
    }
}
```

Example 3:

```
var logHelper = GetLogHelper();
logHelper.LogInformation("This is sample info message");
```

CLM for Users

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

Topic	Description
What's Covered	This section walks the Conga CLM user through a set-up of the entire contract management process. It covers step-by-step instructions, and use cases for the features provided by Conga CLM.
Primary Audience	Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, contract reviewers, contract facilitators, and legal teams.
IT Environment	Refer to the latest CLM Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CLM Documentation.
Other Resources	Refer to the X-Author for Contracts documentation for detailed instructions on setting up templates and editing contract documents.

Before using Conga CLM, you must be familiar with the following:

- Basic understanding of Conga Platform
- Conga CLM terms

This section describes the following tasks:

- **Creating a Contract:** You can fill out a contract form, use a template, or import a contract to create a new contract.
- **Generating a Contract:** After creating a contract, you can use a template to generate a document.
- **Import an Offline Contract or Document**: You can create a contract from a third-party paper or import an offline document.
- **Sending a Contract for Review:** You can send the generated Contract document to the customer for review.
- **Completing Negotiations:** After the review phase, the terms and conditions are negotiated and finalized between the engaged parties.

- **Activating a Contract:** After a contract is finalized and signed, you can activate the Contract to bring it into effect.

Select one of the following topics for more information:

Logging in to CLM on Conga Platform

For more information, see Logging in to Conga Revenue Lifecycle Platform.

Managing Contract Lifecycle

This section describes how to request and manage a contract through the contract lifecycle (create, negotiate, finalize, and activate), and which actions are available to manage the contract after it goes into effect.

Select one of the following topics for more details.

Creating a Contract

When drafting your contract record, you must fill out the mandatory data fields, such as Contract Name, Account, and Contract Type. The system automatically populates the system fields, such as Status and Status Category, that help identify the current stage of the agreement lifecycle.

You can create a contract by:

- Adding basic contract information and generating a contract document later
- Using an existing contract template
- Importing a contract document

The options you select when creating a contract set the following statuses and status categories on the Contract Details page.

Option	Status	Status Category
Fill out a contract form	Request	Request
By Import Documents	Author Contract	In Authoring
By Store Executed Contract	Activated	In Filing
Intelligent Document Import	Import	In Review

Prerequisites

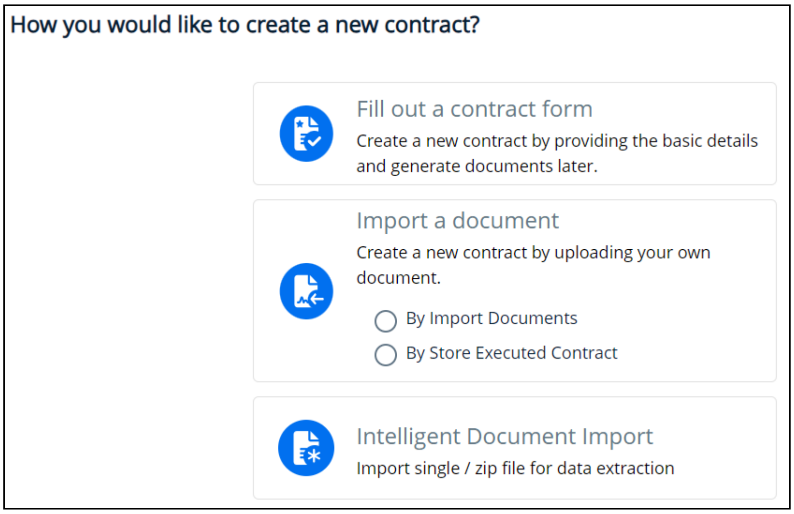
- To create a contract from a template, you have a contract template in the system. For information on creating a template, see Creating New Templates in X-Author for Contracts.

- To import an existing contract document, you have a contract document in the system.

> A contract name must not contain more than 255 characters (including spaces and special characters).

To create a contract

1. Launch Conga CLM and click **Create New Contract** raising this popup:



> - The contract creation options available to you depend on the permission groups that the administrator has linked to your user record in the system. For example, if the administrator has enabled By Import Documents, By Store Executed Contract and Intelligent Document Import actions for the permission group linked to your user record, then the Fill out a contract form option is not available to you for contract creation.
> - If the administrator has enabled only one record type for the Agreement object, then the above pop-up is not be displayed and you are navigated to the contract details page relevant to the enabled record type. For example, if the administrator has enabled only MSA record type, then the other record types such as NDA, Corporate, etc are not displayed in the Contract Type list.

To create a new contract by filling a form

1. Select **Fill out a contract form**.

2. Select **Contract Type**. Conga CLM displays the contract fields for the selected contract type's page layout, configured by the administrator.
3. Fill in the Contract Name, Contract Start Date, Account, Contract End Date, Contract Type, Term Months, Total Contract Value, and Primary Contact fields. The Contract Type and Account fields are required. For more information about contract fields, see Contract Fields.
4. Click **Create**.

After creating a contract, you can generate a contract document. For more information, see Generating a Contract Document.

You can raise a contract request if you are unable to create a contract from this page. For more information, see Creating a Contract Request.

To import contract details from a third-party document

1. Select **By Import Documents** to import a third-party document.
2. Select **Contract Type**. Conga CLM displays the contract fields for the selected contract type's page layout, configured by the administrator.
3. Enter the required details. The Account field is mandatory. For more information about contract fields, see Contract Fields.
4. Upload or drag and drop the contract document from your system. You can import documents in DOC, DOCX, PDF, PNG, RTF, and TXT formats.
5. Click **Create**.

To import an executed contract:

1. Select **By Store Executed Contract** to import an executed contract.
2. Select **Contract Type**. The contract fields configured by the administrator for the page layout of the selected contract type are displayed.
3. Enter the required details. The Account field is mandatory. For more information about contract fields, see Contract Fields.
4. Upload or drag and drop the contract document from your system. You can upload documents in DOC, DOCX, and PDF.
5. Click **Create**.

To import a document using Conga Contract Intelligence

Select **Intelligent Document Import**. The Import Document page opens in a new tab. Follow the steps in Importing Documents and Files.

A contract record is created. The Contract Details page is displayed with the basic information you just added. Click the pencil icon (Edit) to modify existing information or to capture additional information. For more information, see Contract Fields. You can click the hyperlink in the Account field to go to the Account Details page.

The following table describes the actions available for the contract when its category and status are set to Request:

Action	Description
Generate Document	Generates the first version of an agreement document copies it to the agreement record. For more information, see Generating a Contract Document.
Import Offline Document	Imports a third-party contract document and attaches it to the contract record. For more information, see Importing Offline Documents.
Preview	Generates a contract document draft version based on the template set up for the contract type.
Generate Supporting Document	Generates a document of type Supporting Document-type template and attaches it to the contract record. It can be used to attach supporting documents such as contract summary, renewal letter, termination letter, etc. For more information, see Generating Supporting Documents.
Intelligent Document Import	Imports a third-party or offline document and runs it through Conga Contract Intelligence to extract data from it. For more information, see Importing Documents Using Intelligent Import.
Cancel	Cancels a contract. Can be used for contracts that are no longer required.
Submit Request	Submits a request for automatic or manual contract document generation according to the contract rule configuration. For more information, see Submitting a Document Generation Request.

After the contract is created, you can track its lifecycle through the transition bar displayed above the contract details. For more information, see Visibility into the Contract Lifecycle Stage. The contract moves to the next stage configured in the workflow.

Contract Fields

These fields are available on the Contract Details page,

Field Label	Description
Basic Information	
Contract Name	Name of the contract provided by the user while creating a contract; can contain up to 255 characters.
Contract Number	A unique number assigned to the contract by the system.
Account	Link to the account record to identify the external party to this contract.
Contract Type	Contract type for this record
Contract Category	Used to categorize contract types. This can be contract type-specific (add appropriate values for each contract type) and can also be used for template filtering.
Status Category	Higher-level state of the contract: In Authoring, In Effect, Expired, etc. These are Conga CLM reserved values
Status	Status of a contract. These are modifiable by the customer except for these values, Request, Submitted Request, Cancelled Request, In Amendment, Being Amended, etc. These are Conga CLM reserved values to manage contract life cycles.
Total Contract Value	Total value of the contract
Parent Contract	Contract name of the parent contract if you create the current contract as a child or linked as a child.
Executed Date	Is auto-populated when a document is eSigned (Adobe Sign or DocuSign) by all recipients. A user can manually enter the date when the document has wet signatures and when the signed document is uploaded manually.
Primary Contact	Primary contact for the contract

<table>
<tr><th>Field Label</th><th>Description</th></tr>
<tr><td>Approval Status</td><td>Approval status is updated depending on the approval request. The available statuses are:
Not Submitted
Notified
Submitted
Assigned
Approved
Rejected
Reassigned
Cancelled
On Hold
Pending Approval
Approval Required</td></tr>
<tr><td>Owner</td><td>Assigned owner of the contract record</td></tr>
<tr><td>Owner Type</td><td>Owner type of the contract record</td></tr>
<tr><td colspan="2">Terms & Renewals</td></tr>
<tr><td>Contract Start Date</td><td>Effective date of a contract. A required field for activation of fixed-term contracts.

Note
Specifying the contract end date is mandatory for creating a fixed-term contract. For contracts of other term types, this depends on the page layout the administrator configures.</td></tr>
</table>

Field Label	Description
Contract End Date	End date for a contract. A required field for contract activation of fixed-term contracts. **Note** Specifying the contract end date is mandatory for creating a fixed-term contract. For contracts of other term types, this depends on the page layout the administrator configures.
Term Months	Duration of the contract
Contract Term Type	A contract term type is a categorization of specific contract conditions by nature and duration. The following contract term types are available on the Contract Details page and each contract term type has a different logic associated with it. • Perpetual • Conterminous • Fixed Term • Auto Renew
Key Dates	
Retention Date	Date on which the contract is purged
Activated Date	Auto-populated with the date on which the contract is activated
Miscellaneous	
Termination Date	Date on which the contract shall be terminated
Termination Notice Days	Number of days before the contract owner is notified regarding the upcoming termination of the contract. An email notification is sent to the primary contact and the logged-in user. For example, if the contract end date is 05/31/2024 and the termination notice day is 14, an email notification is triggered on 05/17/2024.

Field Label	Description
Expiration Notice Days	Number of days before the contract owner is notified regarding the upcoming expiration of the contract. An email notification is sent to the primary contact and the logged-in user. For example, if the contract end date is 05/31/2024 and the expiration notice day is 14, an email notification is triggered on 05/17/2024.
Non Standard Legal Language	Select the checkbox to indicate whether this contract contains non-standard language

Contract Status Categories and Statuses

This section describes status categories and associated statuses. The workflow stage name refers to the stage name displayed in the lifecycle transition bar for a contract based on the status category and status combination.

Import

This status category indicates that an offline document is imported to CLM.

Status	Workflow Stage Name	Description
Review	**Note** This status category is currently not displayed in the lifecycle transition bar.	Contract ready for a review of extracted clauses and fields

Request

This status category indicates that the contract is in the Request stage.

Status	Workflow Stage Name	Description
Request	In Draft	New request

Status	Workflow Stage Name	Description
In Amendment	In Draft	Contract being amended
In Renewal	In Draft	Contract being renewed

In Authoring

This status category indicates that the contract is in the Authoring stage.

Status	Workflow Stage Name	Description
Author Contract	In Review	Contract being authored
In Amendment	In Review	Contract being amended
Other Party Review	In Review	Contract is being reviewed by another party

In Signatures

This status category indicates that the contract is in the Signatures stage.

Status	Workflow Stage Name	Description
Other Party Signatures	In Signatures	Contract sent for other party signatures
Ready for Signatures	In Signatures	Contract ready for internal or other party signatures
Fully Signed	In Signatures	Contract is fully signed and ready for activation.
Signature Declined	In Signatures	Signature is declined

In Filing

This status category indicates that the contract is in the Filing stage.

Status	Workflow Stage Name	Description
Activated	**Note** This status category is currently not displayed in the lifecycle transition bar.	Contract created with an executed document

In Effect

This status category indicates that the contract is in the Effect stage.

Status	Workflow Stage Name	Description
Activated	In Effect	Active contract
Being Amended	In Effect	Contract is in the amendment process
Being Renewed	In Effect	Contract is in the renewal process
Superseded	In Effect	Contract is superseded
Being Terminated	In Effect	Contract is in the termination process

Expired

This status category indicates that the contract is in the Expired stage.

Status	Workflow Stage Name	Description
Expired	Expired	Contract has expired

Terminated

This status category indicates that the contract is in the Terminated stage.

Status	Workflow Stage Name	Description
Terminated	Terminated	Contract is terminated

Amended

This status category indicates that the contract is in the Amended stage.

Status	Workflow Stage Name	Description
Superseded	Amended	Contract is superseded

Renewed

This status category indicates that the contract is in the Renewed stage.

Status	Workflow Stage Name	Description
Superseded	**Note** This status category is currently not displayed in the lifecycle transition bar.	Contract is superseded

Cancelled

This status category indicates that the contract is in the Cancelled stage.

Status	Workflow Stage Name	Description
Cancelled	Cancelled	Contract is cancelled

Generating a Contract Document

After creating a contract, you must generate a contract document that can be sent for review to stakeholders You can generate a contract document using an existing template or import an existing contract document.

To generate a contract document

1. Go to the Contract Details page.
2. Click **Generate Document**.
3. Select a template or search for a template and select the template's file type.

   > If you had associated a contract template with a contract type when creating a new template using Conga Drive, then those contract templates are listed for selection. For more information, see Using Conga Drive.

   > Only 100 templates are visible in the Select a Template popup. Use the search box to search for a particular template.

4. Select a document format from the Select the Document Format section.

   > The options available in the Select the Document Format section are based on the document format setting configured by your administrator. The options are disabled if the administrator has configured a default document format. For more information, see Document Format Setup.

5. Select a document protection type from the Select Document Protection dropdown.

   > The Select the document permission level dropdown is editable based on the document protection setting configured by your administrator. For more information, see Document Protection Setup.

6. Select the Include Watermark checkbox to apply the watermark to the contract document.
7. Click **Create**.
   A new contract document is created from the selected template. You can view the contract document in the Documents tab on the left panel.

> The document is assigned a name as per the format configured in Document Naming Convention setting.

Document Versions

You can see different document versions as per the naming convention and version properties defined by the administrator.

A version type is created every time a user:

- Generates a document.
- Regenerates a document with a new template.
- Creates an Offline document.
- Imports an Offline document.
- Checks in a Clean document or a document without Redlines.
- Checks in a document as Final.

The following table describes various versions with their descriptions and examples.

Version	Description	Example
Major	A major version can be either a new document instance or an incremented version of a pre-existing document.	1.0 2.0 3.0
Minor (Negotiator)	A minor version is created every time a Negotiator makes changes to the document and checks it in using X-Author for Contracts with the following exceptions: • The Negotiator checks in the document as Clean or Final (creates a major version). • The Negotiator checks in a document on behalf of a Reviewer (creates a revision).	1.1 2.1 1.2

Negotiating a Contract

As a contract manager, you can send a contract document to all the contract stakeholders to negotiate the contract's terms and conditions. After all the stakeholders have provided the comments on the contracts' terms and conditions, you need to compile them and update the contract document manually.

Select one of the following topics for more information.

- Sending a Contract for Simple Review
- Sending a Contract for Microsoft 365 Review

Sending a Contract for Simple Review

At any point in the negotiation process, before finalizing a contract document, you can send the document for review to your customers or other parties involved in the negotiation. You can also send documents from contracts related to the current contract if the administrator has enabled the Show Related Documents setting. For more information, see General Settings.

Prerequisites

- A contract document is available in the contract.
- The contract status category and status must be In Authoring and Author Contract, respectively, to view the Send for Review button.

To send a contract document for review

1. On the Contract Details page, click **Send for Review**.
2. Choose **Send as attachments** on the popup.
3. In the Available Documents section, click the thumbnail ( ) icon or the list ( ) icon to toggle between the views. Select the documents to send for review. Documents with review status In Progress cannot be selected.
    - You must select one document, and only one, with its type as Contract Document.
    - Only the latest versions of the documents are displayed.
    - You can select documents (including additional attachments) of size up to 20 MB.
4. (Optional) Click the **Related** tab if available. Select documents from the contracts related to the current contract. To search specific related contracts, click the **Parent**, **Child,** or **Sibling** tabs.
5. (Optional) Documents selected for sending to the reviewers are displayed in the Current and Related sections in the right panel. Drag documents to rearrange the order.
6. (Optional) In the Document Protection Level column, select the required protection for a document.

> The Document Protection Level dropdown is editable based on the document protection setting configured by your administrator. By default, the "Insert comments and tracked changes only" protection level is selected. For more information, see Document Protection Setup. Document protection is only available for documents in the DOCX format.

7. Click **Next**.
8. Enter recipients in the To field. Once you start entering the user details, i.e. first name, last name, or email address. Autocomplete suggestions appear below the search box if the user or contact exists in CLM. The user's role is displayed under each user's name in the list.

   > You can add users, contacts, and external email addresses to the recipient list.

9. (Optional) From the Email Template dropdown, select an email template.
10. (Optional) Review the Email Preview and update the email subject, and email body if required.
11. (Optional) Click **Add Attachments** to add supporting documents. Upload or drag and drop documents from your system and click **Upload**.
12. Click **Send**.

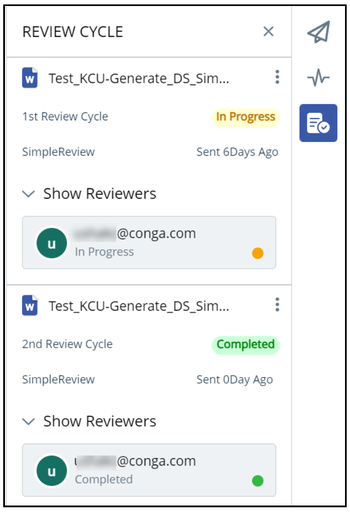
The reviewer receives review documents as an email attachment. The contract status category and status are set to "In Authoring" and "Other Party Review".

> You can send a document for multiple simple reviews The review cycle count is incremented sequentially until a redline document is generated. Once a redline document is generated, the review cycle is restarted. The number of days a review cycle is "In progress" is also incremented sequentially until canceled. The document's review cycle details are displayed in the right panel.

To view a document's review cycle

1. Go to the Contract detail page.

2. Click the **Review Cycle** icon ( ) in the right panel.
   You can view whether the review cycle is In Progress, Canceled, or Completed.



To finish a contract document review

1. Go to the Contract detail page.
2. Click the **Review Cycle** icon ( ) in the right panel.
3. Click the More icon ( ) beside the document name.
4. Click **Finish Review**.
5. On the Finish Review popup:

- Click **Yes** to upload the reviewed document. Select and upload the required documents.
  A new version (redline document) of the existing contract document is generated and is available in the contract's Documents tab. Once a redline document is generated, the review cycle is restarted.
  (Or)
- Click **No** to finish the review without uploading documents.

A message confirming review process completion for the document is displayed. The contract status category and status are set to "In Signatures" and "Ready for Signatures".

Sending a Contract for Microsoft 365 Review

You can send the contract documents to Microsoft 365 for collaborative review by sharing links to the contract documents. You can also send documents from contracts related to the current contract if the administrator has enabled the Show Related Documents setting. For more information see General Settings.

In Microsoft 365, you can collaboratively review a contract document with all the team members and view live changes. When you send a contract document in DOCX format for Microsoft 365 review, a review cycle is created and a redline document is generated. All documents reviewed in Microsoft 365 have change tracking turned on. You can send contract documents for review to stakeholders in and out of your organization.

Prerequisites

- You have a Microsoft 365 subscription.
- You have configured Microsoft 365 settings to send a contract document for review. For more information, see Configuring Microsoft 365 Connections.
- A contract document in DOCX format is available in the contract.

To send a contract document for review

1. On the Contract Detail page, click **Send for Review**.
2. Choose **Share as links** on the popup.
3. If you are not logged in to your Microsoft account or if the token is expired, a pop-up window prompts you to enter your Microsoft email address.

   > If two-factor authenticator is enabled in the system, enter the code displayed in the authenticator app on your phone.

4. In the Available Documents section, click the thumbnail ( ) icon or the list ( ) icon to toggle between the views. Select the documents to send for review. Documents with an In Progress review status cannot be selected.

   > - You must select one and only one Contract Document-type document.
   > - Only the latest versions of the documents are displayed.
   > - You can select additional documents of size up to 20 MB for attaching to the email along with the contract document link.

5. Click the **Related** tab if it is displayed. Select documents from the contracts related to the current contract. To search specific related contracts, click the **Parent**, **Child**, or **Sibling** tabs.
6. Click **Next**.
7. Enter recipients in the **To** field. Once you start entering user details like first name, last name, or email address, autocomplete suggestions appear below the search box

if the user or contact exists in CLM. The user's role is displayed under each user's name in the list.

8. Select an email template from the **Email Template** dropdown.
9. Preview the email and update its email subject and body if required.
10. Click **Add Attachments** to add supporting documents. Upload or drag and drop documents from your system and click **Upload**.
11. Click **Send**.

The reviewer receives the document for review as a link to the document, with supporting documents sent as email attachments. The contract status category and status are set, respectively, to "In Authoring" and "Other Party Review".

> You must cancel the Microsoft 365 review in progress to initiate a new Microsoft 365 review. The review cycle count increments until a redline document is generated. The review cycle restarts after redline document generation. The number of days a review cycle is "In progress" increments until the review is canceled. The right panel displays the document's review cycle details.

To send a contract document for review from the Documents link

1. On the Contract Detail page, go to the Documents link and select the documents to send for review.
2. Click **Send for Review**.
3. A pop-up window prompting you to enter your Microsoft email address appears if you are not logged in to your Microsoft account or if the token is expired. Specify your Microsoft email address and password.

   > If two-factor authenticator is enabled in the system, enter the code displayed in the authenticator app on your phone.

4. Enter recipients in the **To** field and an email body if required. The list displays the user's role under each user's name. The list displays the user's role under each user's name.
5. (Optional) Click **Add Attachments** to add supporting documents. Upload or drag and drop documents from your system and click **Upload**.
6. Click **Send**.

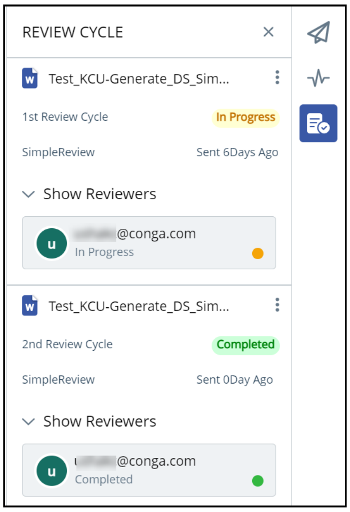
The reviewer receives the document for review as a link to the document, with supporting documents sent as email attachments. The contract status category and status are set, respectively, to "In Authoring" and "Other Party Review".

To review a document

1. Open your email and click the document link.
2. Log in to your Microsoft account. The document opens with change tracking turned on.
3. Make the required changes and close the document.

To view a document's review cycle

1. Go to the Contract detail page.
2. Click the Review Cycle icon ( ) in the right panel. You can view whether the review cycle is In Progress, Canceled, or Completed.



To add reviewers to the review cycle

1. Click the Review Cycle icon ( ) in the right panel.
2. Click the More icon ( ) beside the document name and click **Add Reviewer**.

   Alternatively, you can click the More Details ( ) icon in the Show Reviewers row and click **Add Reviewer** in the Manage Review Cycle page.
3. A pop-up window prompting you to enter your Microsoft email address appears if you are not logged in to your Microsoft account or if the token is expired. Specify your Microsoft email address and password.
4. Enter the recipient's email address and click **Done**.

ⓘ You can add multiple email addresses to the list.

The newly added reviewer receives the review email notification. The system sets the review status to "In Progress.

To cancel a review for a reviewer

1. Click the Review Cycle ( ) icon in the right panel.
2. Click the More Details ( ) icon in the Show Reviewers row to raise the Manage Review Cycle page.
3. Click the More icon ( ) beside the reviewer to finish the review.
4. If you are not logged in to your Microsoft account or if the token is expired, a pop-up window prompts you to enter your Microsoft email address and password. Specify your Microsoft email address and password.
5. Click **Cancel Review**.

The reviewer receives an email notification that the document review is canceled. The review status for the reviewer changes from In Progress to Canceled.

To cancel a review

1. Click the Review Cycle icon ( ) in the right panel.
2. Click the More icon ( ) beside the document name.
3. A pop-up window prompting you to enter your Microsoft email address appears if you are not logged in to your Microsoft Account or if the token is expired. Specify your Microsoft email address and password.
4. Click **Cancel Review**. Click **Yes** to confirm.

All reviewers receive an email notification that the document review is canceled. When you end the review, the review cycle status changes from In Progress to Canceled.

To finish the review for a reviewer

1. Click the Review Cycle icon ( ) in the right panel.
2. Click the More Details icon ( ) in the Show Reviewers row to raise the Manage Review Cycle page.
3. Click the More icon ( ) beside the reviewer to finish the review.

4. A pop-up window prompting you to enter your Microsoft email address appears if you are not logged in to your Microsoft Account or if the token is expired. Specify your Microsoft email address and password.
5. Click **Finish Review**.

A message confirming review process completion on this document for the reviewer appears. The reviewer receives an email notification that the document review is completed. The review status for the reviewer changes from In Progress to Completed.

To finish review

1. Click the Review Cycle icon ( ) in the right panel.
2. Click the More icon ( ) beside the document name.
3. A pop-up window prompting you to enter your Microsoft email address appears if you are not logged in to your Microsoft Account or if the token is expired. Specify your Microsoft email address and password.
4. Click **Finish Review**. Click **Yes** to confirm.

A message confirming review process completion for the document appears. When you end the review, the review cycle status changes from In Progress to Completed. The document is archived and you cannot edit it. The reviewer receive an email notification that the document review is complete.

A new version of the contract document is and available in the Documents tabs on the left panel.

> CLM assigns the document a name formatted per the Document Naming Convention setting.

Finalizing a Contract

After completing negotiations with the customer, you can send the reviewed and approved contract document to the customer to gather the required signatures. Depending on your organization's requirements, you can send the contract document to your customer for manual signature or electronic signature. Once you receive the manually signed documents from the customer, you can upload the signed documents to finalize the contract. If a third-party application such as DocuSign or AdobeSign is installed in your organization, you can send the contract document for electronic signature. Documents in the review are not available to send for signature.

Prerequisites

- You have sent the customer a generated contract document for review.
- The contract record's status category is "In Authoring".
- Send for Signatures is configured in the wet signature setup. For more information, see Setting Up Wet Signatures.

To send a contract for wet signatures

1. On the Contract Details page, click **Send for Signature**.
2. Select WET SIGNATURE and click **Next**.
3. From the Available Documents section, select the documents to send for signature.

   > - You must select at least one document with its Document Type set to "Contract Document".
   > - You can select documents (including additional attachments) of size up to 20 MB.

4. (Optional) Click the **Related** tab if it is available. Select documents from the contracts related to the current contract. To search specific related contracts click the **Parent**, **Child**, or **Sibling** tabs.
5. (Optional) Documents selected for sending to the reviewers are displayed in the Current and Related sections in the right panel. Drag documents to rearrange the order.
6. (Optional) In the Document Protection Level column, select the required protection for a document.

   > The Document Protection Level dropdown is editable based on the document protection setting configured by your administrator. By default, the "Insert comments and tracked changes only" protection level is selected. For more information, see Document Protection Setup. Document protection is only available for DOCX-formatted documents.

7. Click **Next**.
8. Enter recipients in the To field. Once you start entering the user details such as first name, last name, or email address, autocomplete suggestions appear below the search box if the user or contact exists in CLM. User's role is displayed under each user's name in the list.

> You must add users, contacts and external email addresses to the recipient list.

9. (Optional) From the Email Template dropdown, select an email template.
10. (Optional) Check the email preview and update the email subject and email body as required.
11. (Optional) Click **Add Attachments** to add supporting documents. Upload or drag and drop documents from your system and click **Upload**.
12. Click **Send**.

An email notification is sent to all the signers.

To upload a signed document

1. On the Contract Details page, click **Upload Signed Document**.
   The Upload Document popup is displayed.
2. Upload or drag and drop contract documents from your system.
3. Click **Upload**.

The signed document is uploaded to the contract. You can view it in the Documents tab on the left panel.

> The document is assigned a name as per the format configured in Document Naming Convention setting.

To send a contract for electronic signature

Prerequisites

- You have sent a generated contract document to the customer for review.
- The contract record's status category is In Authoring.

From the Contract detail page, click the **eSignature** button. This takes you to the DocuSign, Adobe Sign, or Conga Sign wizard. For more information on each of these signature solutions, see:

- DocuSign
- Adobe Sign
- Conga Sign

The following conditions apply when you send documents in the version-aware contract for eSignatures in DocuSign or Conga Sign:

- The status category changes to In Signatures and the status changes to Other Party Signatures for your contract record.
- The signed contract documents are stored in the Documents link for the contract.
- All the contract clauses are marked as final.
- The document type is updated to Executed Document

> After a contract document is signed, all the smart clauses are marked as final in the Contract Clauses section. The clauses with source action "deleted" and the clauses inserted as text are not marked as final.

Activating a Contract

After the parties have finalized and signed the contract, you can activate the contract to bring it into effect. Activating a contract record is crucial because it ensures that the system monitors key dates and events and that all in-effect contracts are included in appropriate searches and views.

Prerequisites

- No review cycles are in progress for the contract.
- Contract documents are reviewed and signed.
- The status category and status of the contract are respectively, In Signatures | Fully Signed.
- The start date and end date are provided for the contract if it is of the Fixed Term type or if the administrator has configured them to be mandatory irrespective of term type.
- Contract End Date is not prior than the Activated Date.

To activate a contract

1. On the Contract Detail page, click **Activate**.
   The contract is activated and the Status Category and Status are updated to In Effect and Activated, respectively. The Activated Date is updated to the date of activation. You can view the Amend, Renew, Expire, and Terminate buttons on the Contract Details page.

2. From the Available Documents section, select the documents you want to activate.

    > By default, the executed document is selected. Note that any documents not selected for activation are deleted after contract activation.

3. Click **Activate**.
4. Click **Done** to return to the Contract Details page.
5. Click **Notify others** to send an email notification to stakeholders.
6. Enter recipients in the **To** field.
7. Select an email template from the **Email Template** pull-down menu.
8. Preview the email and update its subject and body if required.
9. Scroll to the bottom of the page to the Attachments section and unselect the documents that should not be attached to the email.
10. Click Notify to email a notification to all recipients.

Post-Contract Lifecycle Actions

After a contract is activated and brought into effect (Status | Status Category = Activated | In Effect), you can take further actions necessary to keep the contract up to date. The following post-contract lifecycle actions are available for an activated contract.

Action	Description	Status Category | Status of Original Contract	Status Category | Status of New Contract
Clone	Cloning of contracts is a simple and effective way of creating look-alike agreements with similar fields in both new and cloned contracts, however, cloned contracts can have different information. The cloned contracts inherit fields from the original contracts. After you clone a contract, the new contract name is appended with "Clone".	NA	Request | Request

Action	Description	Status Category | Status of Original Contract	Status Category | Status of New Contract
Amend	During the term of the contract, you may need to modify the contract. For example, the language or terms of the contract. The Amend action is used for this functionality. The Amend action creates a new version of the contract record. All the data from the original version is copied into the new version. The new version can then go through the contract lifecycle. After you amend a contract, the new contract name is appended with "Amended". The Record Type, Contract Start Date, and Account are inherited from the original contract. All the actions are hidden on the original contract. An email notification regarding contract amendment is sent to the primary contact and logged-in user.	In Effect | Being Amended When the new contract is activated, the Status | Status Category updates to Amended | Superseded.	Request | In Amendment

Action	Description	Status Category | Status of Original Contract	Status Category | Status of New Contract
Renew	Towards the end of the contract term, you may want to renew the contract for a further period. In such a scenario, the Renew action would create a new contract version. The contract can then be executed after updating the term of the contract. You can quickly identify contract renewal candidates, allowing plenty of time to act and create new contract drafts based on the previous contract. Before you renew a contract, ensure Contract End Date is not set to a future date. After you renew a contract, the new contract name is appended with "Renewed". The Record Type and Account are inherited from the original contract. The Contract Start Date is set to the next day of the original contract end date. All the actions are hidden on the original contract. An email notification regarding contract renewal is sent to the primary contact and logged-in user.	In Effect | Being Renewed When the new contract is activated, the Status | Status Category updates to Renewed | Superseded.	Request | In Renewal
Terminate	If you decide to terminate or end a contract, you can use the Terminate action. After you terminate a contract, all the actions are hidden. An email notification regarding contract termination is sent to the primary contact and logged-in user.	Terminated | Terminated	NA
Expire	After the contract term ends, use the Expire action to mark the contract as expired. After you expire a contract, all the actions are hidden. An email notification regarding contract expiration is sent to the primary contact and logged-in user.	Expired | Expired	NA

Action	Description	Status Category | Status of Original Contract	Status Category | Status of New Contract
Cancel	If you decide to cancel a contract, use the Cancel action to cancel the contract. After you cancel a contract, you are navigated to the Contract Details page and Primary Contact and Owner of the contract receive contract cancelation email notification. The cancel option is only available till the contract is activated.	Canceled | Canceled	NA

Renewing a Contract

Towards the end of the contract term, you may want to renew the contract. In such a scenario, the Renew action creates a new contract version. The contract can then be executed after updating the term of the contract. You can quickly identify contract renewal candidates, allowing plenty of time to act and create new contract drafts based on the previous contract.

Before you renew a contract, ensure Contract End Date is not set to a future date.

After you renew a contract, the new contract name is appended with "Renewed". The Record Type and Account are inherited from the original contract. The Contract Start Date is set to the day after the original contract end date.

All the actions are hidden in the original contract. An email notification regarding contract renewal is sent to the primary contact and logged-in user.

Prerequisite

Ensure the contract is In Effect and Activated.

To renew a contract

On the Contract Details page, click **Renew**.
A new contract is created with the contract number increment by a decimal point and the status category is set as Request and status as In Renewal. The original contract status

category remains In Effect and the status changes to Being Renewed. When the new contract is activated, the original contract status category updates to Renewed and the status updates to Superseded. A notification email is sent to the contract manager and the primary contact that the contract is renewed.

To auto-renew a contract

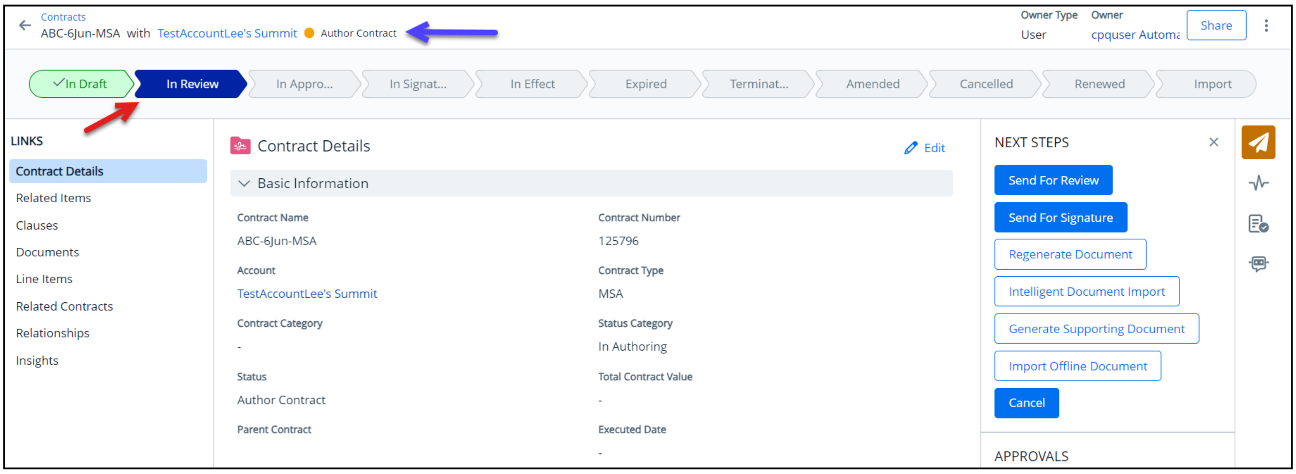
Prerequisites

- Ensure either End Date or Term Months fields are populated.
- Ensure the Start Date is not before the Activated Date.

1. On the Contract Details page, click **Edit**.
2. In the Terms & Renewals section, click the **Contract Term Type** dropdown and select **Auto Renew**.

Visibility into the Contract Lifecycle Stage

Once you create a contract, you can track its lifecycle through the transition bar displayed above the contract details. The workflow stages are arranged sequentially, depicting the progress of the contract stages from initiation to completion.



The current contract stage is displayed in blue, and the completed contract stages are displayed in green. For more information about the mapping between contract statuses, and status categories, see Contract Status Categories and Statuses. Click the workflow stage icon to view the tooltip with a brief description of the stage.

The workflow transitions to *In Approvals* stage when the contract status category is updated to *In Authoring* and status changes to *Language Approval*. The administrator must set these configurations in the Update Actions tab of Approval Flows. For more information, see Approval Flows.

The workflow transitions to *In Signatures* stage when the contract status category is updated to *In Signatures* and status changes to *Ready for Signatures*. The administrator must set these configurations in the Update Actions tab of Approval Flows. For more information, see Approval Flows.

You may see additional stages and activities workflow if the administrator has configured custom workflows. For more information, see Working with Workflow Activities.

Working with Workflow Activities

Workflows enable you to automate manual tasks, synchronize data across systems, and boost productivity. For instance, automating tasks such as updating an object's status or sending email alerts saves your team valuable time that would otherwise be spent on these manual activities. The stages and activities in the workflow determine the workflow transition and activities taking place in each stage. An activity signifies a task within a workflow, whereas a workflow definition is a series of activities, like sending an email or previewing and submitting an approval process. These workflow activities can be carried out either manually or automatically. For more information on configuring workflow activities, refer to the **Workflow** module in Managing Admin Console.

The administrator can configure custom workflows, in addition to the out-of-the-box workflows supported by the system. They can add various activities such as approvals-related, document generation-related, and so on, to the custom workflows. This section explains the activities that can be added to custom workflows.

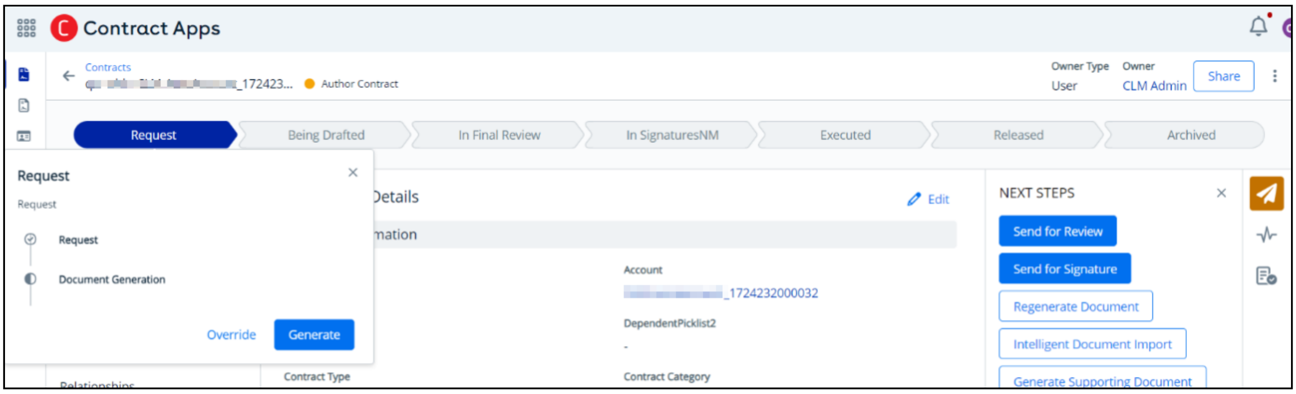
Document Generation

After creating a record for the contract, you need to have a contract document that outlines the terms and conditions of the relationship between the engaging parties. A contract can be generated manually or automatically, depending on predefined criteria such as contract type, account, etc.

The administrator can configure the workflow with a stage and an activity for the manual or automatic generation of contract documents.

Manual Document Generation

If the administrator has configured the workflow with a stage and an activity for manual document generation, the stage is displayed in the contract lifecycle transition bar. Click on the stage icon to generate a contract document or override the process and move ahead in the workflow.

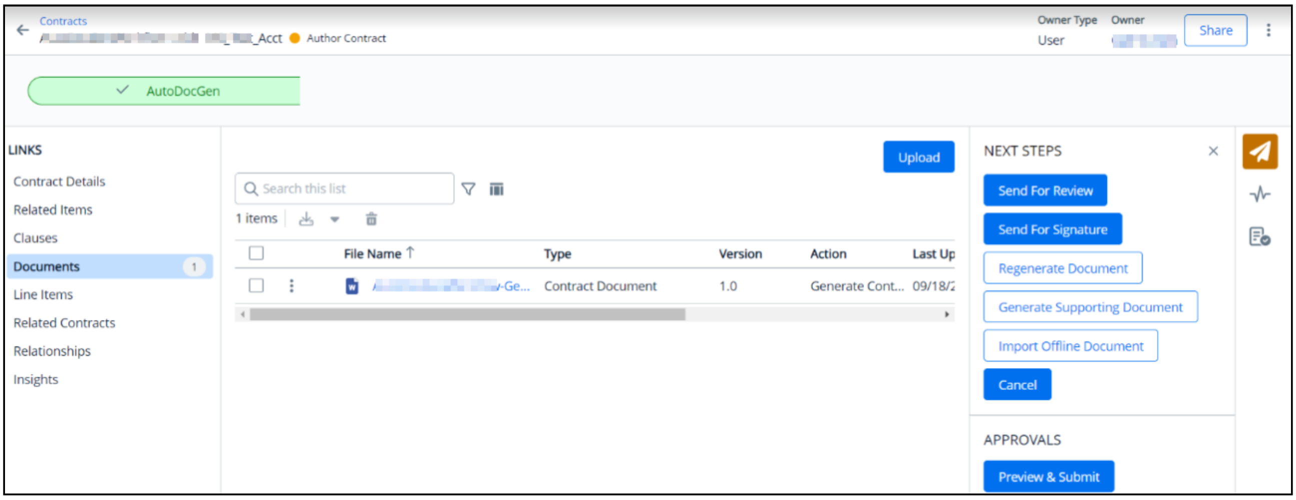


Automatic Document Generation

Prerequisites

- The administrator has configured the workflow with a stage and an activity for automatic document generation.
- The administrator has selected a contract template in the Rule Setting in the Admin Console.

The contract document is automatically generated after contract creation and the workflow stage is displayed in the contract lifecycle transition bar.



Approvals

A contract may require multiple approvals throughout its lifecycle due to business needs, such as clause modifications, changes in key business values, internal processes, and more.

The workflow facilitates approvals as an activity, enabling users to easily preview and submit approval requests.

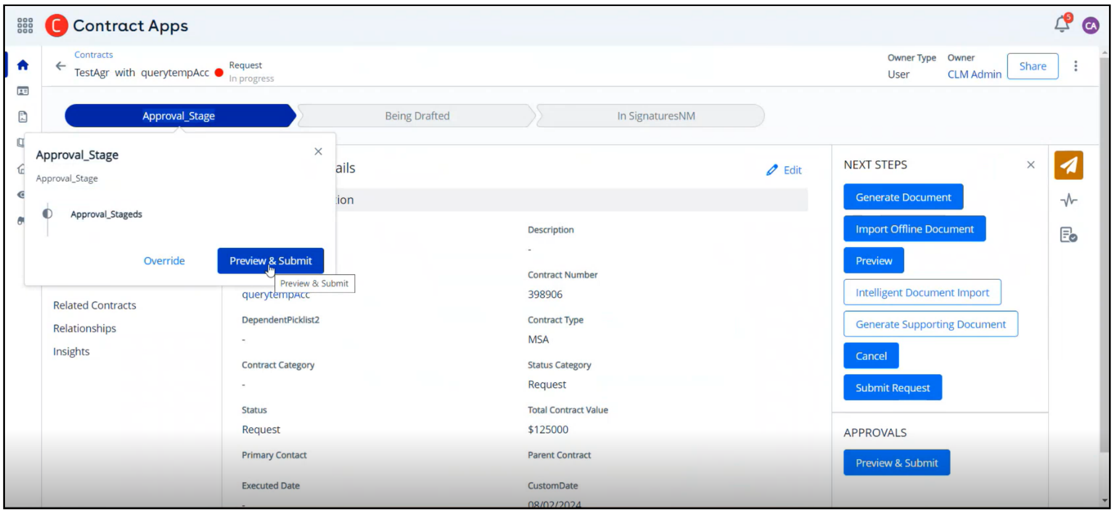
Administrators can configure an approval activity to enable users to preview and submit an approval and then either approve or reject an approval request. For more information on configuring approval workflow in the admin console, refer to the **Workflow** module in Managing Admin Console.

Workflow for Approvals activity

Prerequisite: The administrator has set up the approval workflow, and the contract is now ready for approval.

The approval workflow stage is shown in the transition bar on the contract details page. Click the Approval workflow stage to access the following two buttons:

- Preview & Submit: Click this button to go to the Approvals page, where you can preview and submit an approval process. For more information about previewing and submitting an approval request, see Working with Approvals.
  According to the criteria established by the admin for the approval activity, the workflow progresses to the next step.
- Override: You can override an approval process.



> ⚠ These action buttons are visible only when the approval status is Not Submitted, Approval Required, or Canceled.

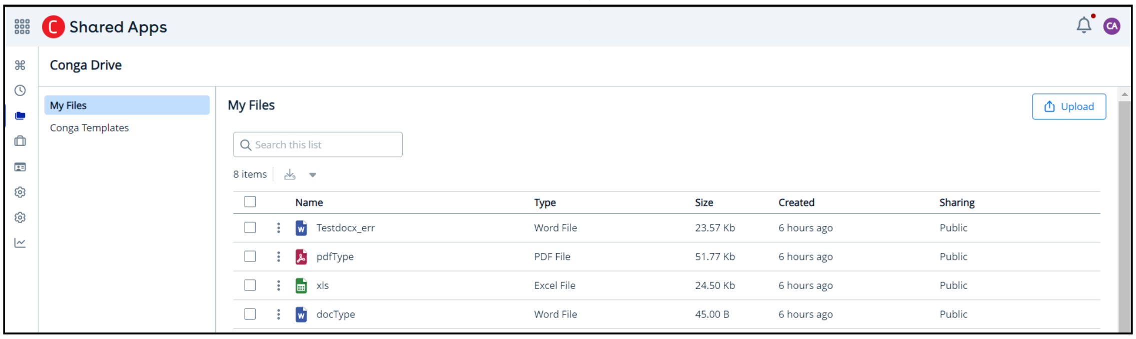
Using Conga Drive

Conga Drive stores your contract documents as templates for use with CLM application. You can create your contract templates in the Conga Drive system and upload the templates.

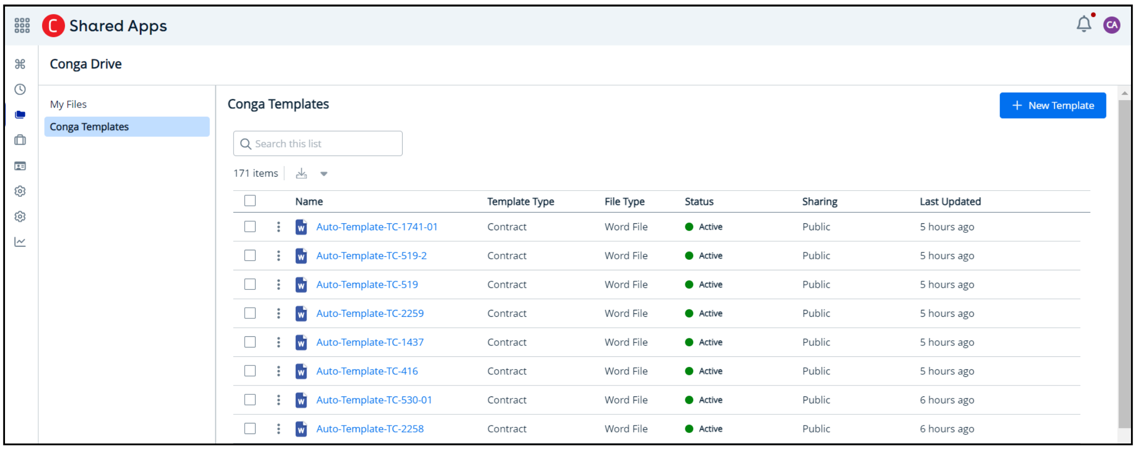
Prerequisite: Access to CLM application

To use Conga Drive

1. Click the App Launcher icon ( ).
2. Select **Conga Drive** from **Shared Apps**.
3. You will see the following sections.
   - **My Files**: You can view the list of stored documents. Each document displays the name, type, size, created date and sharing status.

   - **Conga Templates**: You can see the list of stored contract templates. Each template record displays the template type, file type, status, sharing rules and the last updated date.

For more information on creating contract templates using Conga Drive, see Working with Conga Drive.

Working with Contracts

Select one of the following topics.

- Viewing Recently Viewed Contracts
- Submitting a Document Generation Request
- Managing Views
- Contract Line Items
- Generating Supporting Documents
- Managing Custom Contract Relationships
- Deleting Contract Documents
- Changing a Contract's Ownership
- Editing a Contract
- Searching Contracts
- Importing Documents Using Intelligent Import
- Importing Offline Documents
- Joining Documents
- Regenerating a Contract Document
- Uploading a Document
- Using Clause Library
- Viewing Activity History
- Viewing Related Contracts
- Working with Clauses
- Working with Contract Terms
- Working with Dashboard
- Working with In Effect View
- Deleting a Contract
- Exporting Contract Details
- Viewing Contract Documents
- Sharing Records with Users and User Groups
- Working with Related Items

Viewing Recently Viewed Contracts

You can quickly return to your most recently viewed contracts using the “Recently Viewed” tab.

Note

The recently viewed contracts are displayed for the current login session only. They will not be displayed if you have cleared the cache or have logged in back.

To search contracts

1. Enter a search term in the search bar and press **Enter**.
2. Click the **Advanced Search** icon ( ) to apply filters to your search results. The Advanced Search window is displayed.
3. Select a field and an operator.
4. Enter a value for the selected field.
5. To add another filter, click **Add Criteria** and repeat steps 3 and 4.
6. To remove the search criteria., click the delete icon ( ) next to the search query.
7. Click **Remove All** to remove multiple search criteria.
8. Click **Apply**.

A list of contracts that match the criteria is displayed. Up to 50 recent contracts are displayed in the list.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove all columns, click **Insert All** or **Remove All**, respectively. At least one column must be displayed in the grid.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Sorting Contracts

You can sort the contracts by clicking the column names. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till the two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **Create New Contract** to create a contract. For more information, see Creating a Contract.
- Click the contract name link to open the **Contract Details** page.
- Click the More icon (⋮) next to a contract name to clone an existing contract.
- Click the More icon (⋮) next to a contract name to delete an existing contract. For more information, see Deleting a Contract.

Submitting a Document Generation Request

Prerequisites

- The contract status category and status are set Request.
- Contract rules are configured. For more information, see Contract Rules and Use Case for Contract Rules.

To submit a documentation request

On the Contract Details page, click **Submit Request**.

A confirmation message is displayed if the contract information matches a contract rule and the rule is triggered. Depending on the contract rule triggered, either of the following takes place:

- If an active contract rule is triggered in "auto" submit request mode, the contract document is automatically generated with the template selected in the agreement template rule. The document is sent to the primary contact as an email attachment using the email template selected in the email template rule. The contract document is also available in the contract's Documents link.
- If an active contract rule is triggered in "manual" submit request mode, the Owner field value is changed to the user group selected in the user group agreement rule. An email about the transfer of ownership is sent to the address specified in the user group.

If the contract information doesn't match any of the contract rules, a confirmation message `" Unable to submit the contract because it didn't match any submission rules. Please contact your administrator for assistance"` is displayed.

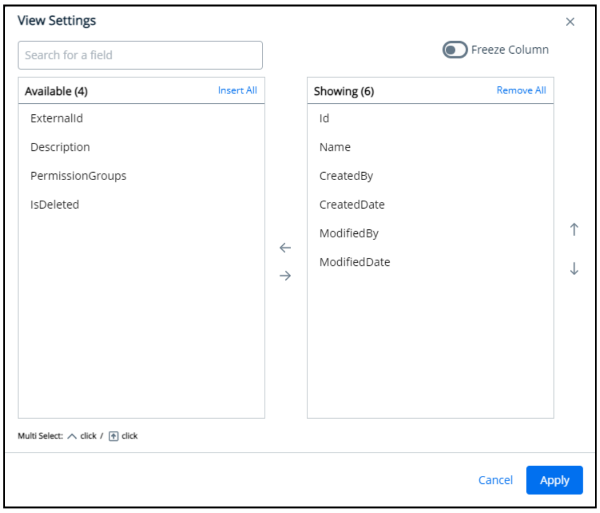
Managing Views

Unable to render include or excerpt-include. Could not retrieve page.

Managing View Settings

You can use **View Settings** to manage which columns are displayed in the grid, group the records according to the columns, pin a column range, or rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon. A **View Settings** dialog box is displayed.


2. To remove a column from the grid, highlight it in the right-hand section and click the icon.
3. To add a column to the grid, highlight it in the left-hand section and click the icon. You can use the type ahead above the section to search for a specific field.
4. To add or remove more than one column, use Ctrl-Click or Shift-Click to highlight the columns, then click **Add/Remove Selected Fields** (left and right arrows).
5. To add or remove all columns, click **Insert/Remove All**.
At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

To rearrange columns in the grid

1. Click the **View Settings** icon to open the View Settings dialog.

2. In the right-hand section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

To freeze/pin columns

1. Click the **View Settings** icon to open the View Settings dialog.
2. Click the **Freeze Column** slider to enable pinning.
3. Click and drag the top and bottom sliders to define the range of visible columns to be pinned.
4. Click **Apply** to close the dialog and apply view settings to the grid. Or click **Apply and Save to View** to apply view settings and save them to the current view (if any).

Contract Line Items

A contract line item is a feature that allows you to add detailed information about a specific product or service to a contract. It includes essential details such as the product's name, pricing, quantity, and any other relevant information. Contract line items are essential for specifying the terms and conditions associated with each product or service within the contract, providing a comprehensive overview of the contract's components. They are also used for defining tables in a way that Contract Intelligence can recognize.

To add a line item

1. Open a contract.
2. On the LINKS panel, click **Line Items**.
3. Click **Add New Line** Item.
4. Enter the following details:

Field	Description
Line Item Name	Enter a name for the line item.

Field	Description
Product	Enter a product name.
Quantity	Enter the quantity of the product.
Extended Price	Enter the extended price. Extended price is the sum of the base price plus the option price multiplied by quantity and term ((Base Price + Option Price) x Quantity x Term).
Net Price	Enter the net price. Net price is the adjusted price with all category-level adjustments applied.
List Price	Enter the list price. List price is the standard price of a product or service, excluding all discounts, rebates, priced options, or other adjustments.
Description	Enter a description

5. Click **Create**.

To configure View Settings

View Setting allows you to control which columns are displayed in the grid and rearrange the column order. Click the **View Settings** ( ) icon to control the columns displayed in the grid. For more information, see Managing View Settings.

You can save your filtered view of a record and set as the default view to avoid reselecting the filters every time you open the grid (list) view. For more information, see Managing Views.

To clone a line item

1. For a line item, click the More icon ( ) and select **Clone**.
2. Update the required fields and click **Save**.

To edit a line item

1. For a line item, click the More icon ( ) and select **Edit**.
2. Update the required fields and click **Save**.

To delete a line item

1. For a line item, click the More icon ( ) and select **Delete**.
   The Delete Line Item popup is displayed.
2. Click **Delete**.

To delete multiple line items

1. Select line items to delete.
2. Click the delete icon ( ).
   The Delete Line Item popup is displayed.
3. Click **Delete**.

Generating Supporting Documents

Using contract templates, you can generate a supporting document, such as Contract Summary, Renewal Letter, and Termination Letter.

To generate a supporting document

1. On the Contract Details page, click **Generate Supporting Document**.
2. Select a template or search for a template and select the template's file type.

   > Only 100 templates are visible in the Select a Template popup. Use the search box to search for a particular template.

3. Select a document format from the Select the Document Format section.

   > The options available in the Select the Document Format section are based on the document format setting configured by your administrator. For more information, see Document Format Setup.

4. Select a document protection type from the Select the document permission level dropdown.

   > The Select the document permission level dropdown is editable based on the document protection setting configured by your administrator. For more information, see Document Protection Setup.

5. Select the Include Watermark checkbox to apply the watermark to the contract document.
6. Click **Create**.
   A new contract document is created from the selected template. You can view the contract document in the Documents tab on the left panel.

> The document is assigned a name as per the format configured in Document Naming Convention setting.

Managing Custom Contract Relationships

You can link one contract to another by creating custom relationships between contracts. You can create Amendment For, Amended By, Renewal For, and Renewed By relationships between contracts.

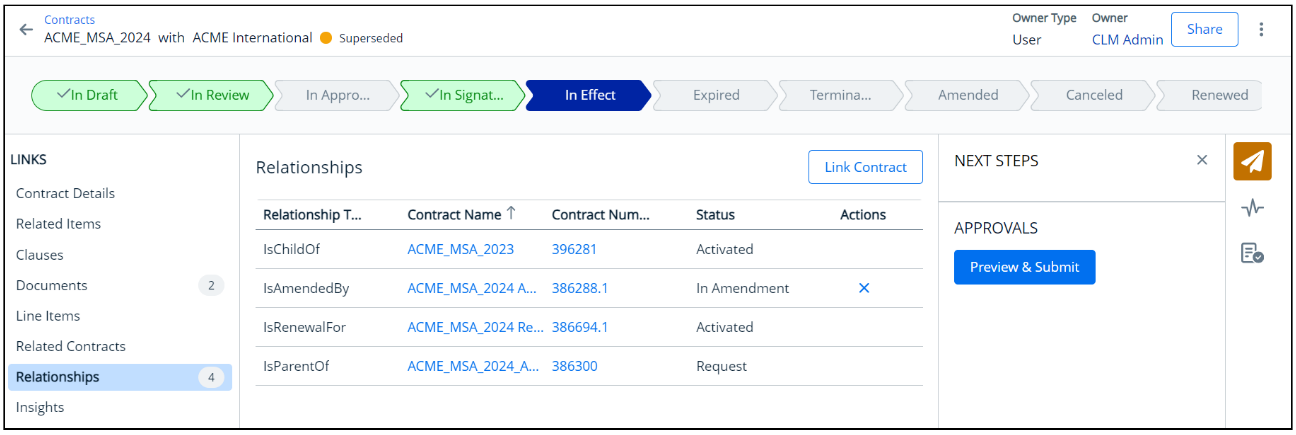
When you amend or renew a contract using Contract Actions, the original and the new contract are linked automatically and you cannot delete such relationship.

You can use the Parent Contract field on the Contract Detail page to create a parent-child relationship between two contracts. You can see IsParentOf and IsChildOf relationships in parent and child contracts respectively.

To create a custom contract relationship

1. Open the Contract Detail page for a contract.
2. In the LINKS panel, click **Relationships**.
3. Click the **Link Contract** button.
   The Link Contract popup is displayed.
4. Select a Relationship Type.
5. Search for a contract using the contract name in the Contract Name field. A message showing the relationship that will be established between the two contracts is displayed.
6. Click **Link**.

The Relationships table showing all the contracts related to the current contract is displayed.



Column	Description
Relationship	Relation between the contract in this row and the current contract
Contract Number	Contract number contract related to the current contract
Contract Name	Name of the contract related to the current contract
Status	Status of the contract related to the current contract
Actions	Action to delete the relationship. This action is available only for the contracts linked using contract actions i.e. Amend and Renew.

To delete a custom contract relationship

You can delete contract relationship formed due automatic linking of contracts using Amend and Renew contract actions.

1. Open the Contract Detail page for a contract.
2. In the LINKS panel, click **Relationships**.
3. Click the **Delete** icon (×) for a relationship to delete the relationship.
4. In the Delete Record popup, click **Delete**.
   The custom contract relationship is removed between the contracts.

To create a parent-child contract relationship

1. Open the Contract Detail page for a contract.
2. Click **Edit**.
3. In the Parent Contract field, add the name of a child contract.
4. Click **Save**.
5. In the LINKS panel, click **Relationships**.
   You can see the IsParentOf relationship is added. Similarly, you can see the IsChildOf relationship is added in the child contract.

Deleting Contract Documents

You can remove documents that need to be excluded from a contract or documents that are no longer valid.

To delete a contract document

1. On the Contract Details page, go to Documents.
2. Click the More icon ( ).
3. Select **Delete**.

To delete multiple contract documents

1. On the Contract Details page, go to Documents.
2. Select documents and click the delete icon ( ).
3. On the Delete Record popup, click **Delete**.

Changing a Contract's Ownership

You can assign a contract to a user or a user group for them to work on it. You can also assign a contract to yourself if it is already assigned to another user or a user group.

To assign a contract to a user or user group

1. Go to the Contract Details page.
2. Click the edit icon (Edit).

3. To assign the contract to another user, select User as the **Owner Type** and specify the user Name in **Owner**. To assign it to a user group, select User Group as the Owner Type and specify the User Group Name in Owner.
4. Select **Send email notification for owner change** button to notify the new owner about transfer of contract ownership.
5. Click **Save**.

The new contract owners will receive an email notification along with the contract URL to view the contract record in Conga CLM.

To assign a contract to yourself

1. Go to the Contract Details page.
2. Click the edit icon (Edit).
3. Click **Assign to Me**. Your user Name is displayed in the Owner field.
4. Select **Send email notification for owner change** button to receive a notification transfer of contract ownership.
5. Click **Save**.

You will receive an email notification along with the contract URL to view the contract record in Conga CLM.

Editing a Contract

You can edit and update terms and conditions in a contract after you have created the contract.

To edit a contract

1. Go to the Contract Details page.
2. Click the edit icon (Edit).
3. Update the required details and click **Save**.

Searching Contracts

You can search contracts on the Contracts List page and Document List View page using the regular search or advanced search.

To search contracts

1. On the Contracts List page, enter a search term in the search bar and press Enter.
2. Click the filter icon ( ) to apply filters to your search results.
   The filter popup is displayed.
3. Select a field and an operator.
4. Enter a value for the selected field.
5. To add another filter, click **Add Criteria** and repeat step 3.
6. To add logic, turn on the Logic toggle. You can use:
   - Numbers to refer to each condition
   - AND or OR to identify which combination of conditions must be true
   - Parentheses to group parts of the string together
   - Sample expression: ((1 AND 2 AND 3) OR 4)
7. Click **Apply**.

Importing Documents Using Intelligent Import

You can import third-party or offline documents into CLM and run them through Contract Intelligence to extract data from them.

Prerequisites

- You have a Conga Contract Intelligence (CCI) license.
- Contract Intelligence for Conga CLM is configured as described in Setting Up Conga Contract Intelligence.

To navigate to CCI from the Contract List page

1. On the Contract List page, click **Contract Intelligence**.
2. CCI opens in a new tab. For more information, see Contract Intelligence for Users.

To import documents into a contract

1. On the Contract Details page, click **Intelligent Document Import**.
2. The Import Document page opens in a new tab. Follow the steps in Importing Documents and Files.

To navigate to CCI from the Contract Details page

> **Note**
>
> The Go to CCI Documents link is available only for the contracts having Import and Review as the status category and status, respectively.

On the Contract Details page, click **Go to CCI Documents** to open the imported document. The document opens in CCI for review. For more information, see Reviewing Imported Documents.

Importing Offline Documents

You can import third-party paper into Conga CLM.

Prerequisite

Documents for import are in DOC, DOCX, PDF, PNG, RTF, and TXT formats.

Restriction

You cannot import documents to a contract after it is in the Activated status.

To import offline documents

1. On the Contract Details page, click **Import Offline Document**.
2. Upload or drag and drop contract documents from your system.

   > ⓘ You can upload a maximum of 10 documents totaling up to 15 MB.

3. Click **Upload**.
   The imported document is added to the contract and is available in the Documents tab on the left panel.

Related Topic

Importing Offline Contracts using X-Author for Contracts

Joining Documents

This feature allows you to combine the latest versions of different contract documents. You can merge the documents in different formats (DOCX, DOC, and PDF formats) into one document before sending the documents for review or activating a contract.

Prerequisite

At least two different contract documents (documents generated using different templates) are available in a contract.

Restriction

You cannot join documents in a contract after it is in 'Activated' status.

To join documents

1. Open a contract and click **Join Documents**.
2. From the Available Documents section, select the documents to merge.
3. In the Selected Documents for Join section, click and drag the reorder icon ( ) to rearrange the order of documents and click **Next**.
4. Enter the following details and click **Join.**

Field	Description
Document Name	Enter a name for the joined document.
Output File Type	Select a document type for the joined document.
Output Format	Select the document output format of the joined document. If all the documents you are joining are in DOC or DOCX format, you can select the output format (DOCX or PDF). If the documents you are merging contain at least one PDF, the PDF output format is selected by default and the DOCX output format is disabled.

Field	Description
Protection Level	Select the required protection for the joined document. If you select DOCX as the output format, you can select any protection level. The protection level is only applicable to DOCX documents. The Protection Level dropdown is editable based on the document protection setting configured by your administrator. For more information, see Document Protection Setup.
Watermark	Select the Apply Watermark option to add a watermark to the joined document. Select the Remove Watermark option to remove any watermark from the joined document. This option is applicable when all the selected documents are in DOC or DOCX format. If a DOCX document contains the draft watermark among the DOCX documents you need to merge and you select the Remove Draft Watermark option, the merged document will not retain the watermark from the original document. The Remove and Apply Draft Watermark option is only applicable to DOCX documents but not for PDF documents.
Header and Footer	Select the Retain Header and Footer option to keep the header and footer of the selected documents. Select the Custom Header and Footer option to add a custom header and footer in the joined document. When you select the Custom Header and Footer option, the Header and Footer fields are enabled and you can enter the required text. If you select the Custom Header and Footer option and leave the Header and Footer fields blank, the Select Custom Header and Footer to see Header and Footer fields and add custom header and footer.

A new document is created by merging the documents selected for joining. You can view the merged document in the Documents tab on the left panel.

Related topics

Comparing and Merging Contract Documents using X-Author for Contracts

Regenerating a Contract Document

You can use the same template that you used while generating a contract document or a different template to update a contract document.

To update a contract document

1. Go to the Contract Details page.
2. Click **Regenerate Document**.
3. Select a template or search for a template and select the template's file type.

   > If you had associated a contract template with a contract type when creating a new template using Conga Drive, then those contract templates are listed for selection. For more information, see Using Conga Drive.

   > Only 100 templates are visible in the Select a Template popup. Use the search box to search for a particular template.

4. Select a document format from the Select the Document Format section.

   > The options available in the Select the Document Format section are based on the document format setting configured by your administrator. If the administrator has selected a default format, it is selected by default and all the document format options buttons are disabled. For more information, see Document Format Setup.

5. Select a document protection type from the Select the document permission level dropdown.

   > The Select the document permission level dropdown is editable based on the document protection setting configured by your administrator. For more information, see Document Protection Setup.

6. Select the Include Watermark checkbox to apply the watermark to the contract document.
7. Click **Create**.
   A new contract document is created from the selected template. You can view the contract document in the Documents tab on the left panel.

Uploading a Document

You can upload a document with a specific document type to a contract.

To upload a document

1. On the left panel, click **Documents**.
2. Click **Upload**.
3. Drag and drop the document you need to upload or click **Browse Files** to select a document from your system.

   > You can upload documents in DOC, DOCX, PDF, XLS, XLSX, MSG, TXT, PNG, and RTF formats.

4. After you attach the document, click the **Select Type** dropdown and select one of the following document types for the uploaded document.
   - Supporting Document
   - Global Document
   - Company Document
   - Custom/Other
5. Click **Upload**.
6. After the document uploads, click **Done**.

You can view the contract document in the Documents tab on the left panel.

Using Clause Library

A clause library is a repository for clauses that can be accessed and utilized throughout the contract management process. The following types of clauses are available within the clause library:

- Web standard clause
- Web alternate clause
- X-Author standard clause

- X-Author alternate clause

Within the clause library page, you can:

- View a list of clauses sorted by their last modification date.
- Search for clauses by their name, keywords, or specific criteria.
- Access the text and details of a selected clause.
- Switch between various versions of a clause and compare them.
- View alternate clauses associated with a standard clause.
- Edit a clause.
- Create a new clause (either a Web Standard Clause or a Web Alternate Clause).
- Clone a clause (either a Web Standard Clause or a Web Alternate Clause).

When you perform an advanced search on the available clauses, you can use the following fields to filter clauses:

- Name
- Clause Type
- Contract Types
- Category
- Subcategory
- Language
- Updated by
- Updated on
- Keywords

This section covers the following topics.

- Creating a Clause
- Searching Clauses
- Editing a Clause
- Deleting a Clause
- Cloning a Clause
- Viewing Alternate Clauses
- Comparing Clause Versions

Related topics

- Working with Web Clauses using X-Author for Contracts
- Using the Clause Library for a Contract in X-Author for Contracts

Creating a Clause

1. Click the **App Launcher** icon ( ) and select **Clause Library**.
2. Click **New Clause**.

> ⓘ You can view the **Create New Clause** button if no clauses are available in CLM. If there are clauses available in CLM, you see a list of clauses.

3. In the Details tab, enter the following details.

Field Name	Description
Clause Name	Enter the name of the clause.
Clause Type	Select Standard Clause from the dropdown to mark a clause as the main clause or select Alternate Clause to mark a clause as a substitute for a standard clause.
Clause Format	The field is disabled and set to Web by default.
Contract Type	Select multiple contract types from the picklist to associate with your clause. The value of Contract Type decides which clauses are available in the Clause Library of a template or contract.
Category	Select a category for your clause. The values of the categories are defined by your admin and help in filtering the clauses.
Sub Category	Select a subcategory for your clause. The values of the subcategory are dependent on the Category you select.
Language	Choose the default clause language from the picklist.
Description	Enter the description for the clause. You can provide a detailed description of the clause.

4. Click **Add Clause Text**.
5. Enter the clause text in the CONTENT field.
6. Enter comma-separated keywords to associate with the clause.

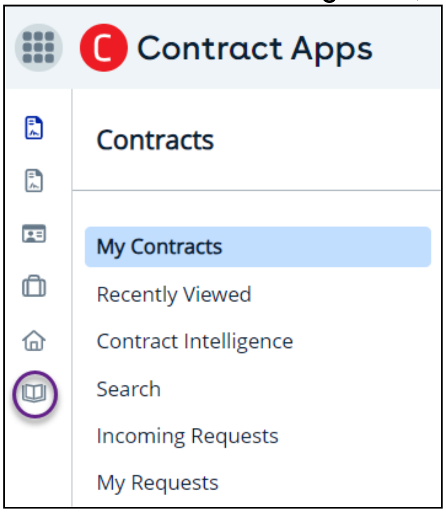
Keywords are useful when you search for clauses in the Clause Library.

7. Click **Save**.

Searching Clauses

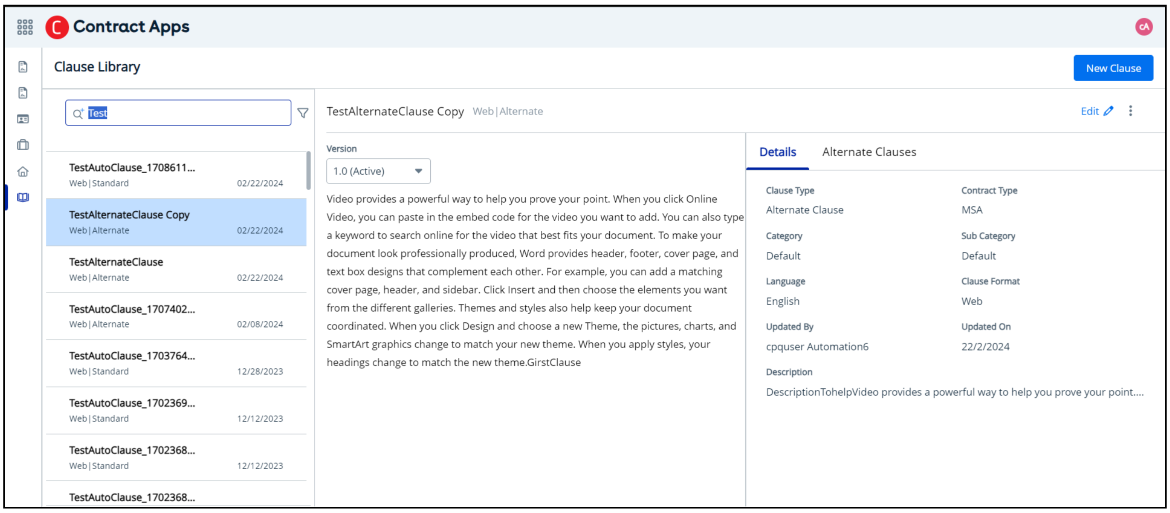
To search clauses in the clause library

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Click the **Clause Library** icon ( ).



3. In the search box, enter a clause name or a keyword in a clause.
4. Press **Enter**.

   You can view a list of clauses matching your search criteria displayed according to the clause's last modified date.



5. Click the filter icon ( ) to apply filters to your search results. This displays the Advanced Filter window.

6. Click **Add Criteria**.
7. Select a field to use in the filter criteria.
8. Select an operator from the drop-down.
   The operator defines the relationship between the field and the value. The list of available operators varies depending on the chosen field's data type.
9. Enter the value of the field. The type of value field depends on the field selected.

   > ⓘ To search for a standard clause or alternate clause, you can choose one of the following options:
   > - Select Clause Type as field, Operator as Equals, and select Standard Clause or Alternate Clause as value.
   > - Select Clause Format as field, Operator as Equals, and select X-Author or Web as value.

10. To add another filter, click **Add Criteria** and repeat steps 7, 8, and 9.
11. Click **Apply**.
    This displays the search results according to your search criteria.

Editing a Clause

Restriction: You cannot edit an X-Author Alternate clause.

To edit a clause

1. Select a clause and click the Edit icon (Edit ✎).
2. Update the required fields in the **Details** tab.
3. On the Clause Text tab, edit the clause text in the **CONTENT** field.

   > ⓘ You can enter a maximum number of 20,000 characters in the **CONTENT** field.

4. Click **Save**.
5. Select the available alternate clauses and click the plus sign (+) to add to the **Alternate Clauses** tab. Use the remove icon (ⓧ) to remove the added clause and add it to the "Available Alternate Clauses".
6. Click **Save**.

To edit an X-Author standard clause

1. Search and select an X-Author standard clause.
2. Click the edit icon (Edit ✎) to display the **Alternate Clauses** tab. You can view a list of alternate clauses with the same contract type in the Available Alternate Clauses

section. For example, if the standard clause contains the NDA contract type, only the NDA contract type of alternate clauses is displayed.

> In the Available Alternate Clauses section:
> - Enter a clause name or keyword in the search box to search for alternate clauses.
> - Click the info icon ( ) to view the clause name and its content.

3. Select the available alternate clauses and click the plus sign (+) to add to the **Alternate Clauses** tab. Use the remove icon ( ) to remove the added clause.
4. Click **Save**.

Deleting a Clause

To delete a clause

Restriction: You cannot delete a clause that is associated with a template.

1. Select a clause.
2. Click the More icon ( ) and select **Delete**.
3. On the Delete Clause popup, click **Delete**.
   The clause is deleted.

> You cannot delete an alternate clause associated with a standard clause.

Cloning a Clause

To clone a clause

Restriction: If a standard clause has associated alternate clauses and you clone the standard clause, the associated alternate clauses are not added to the cloned clause.

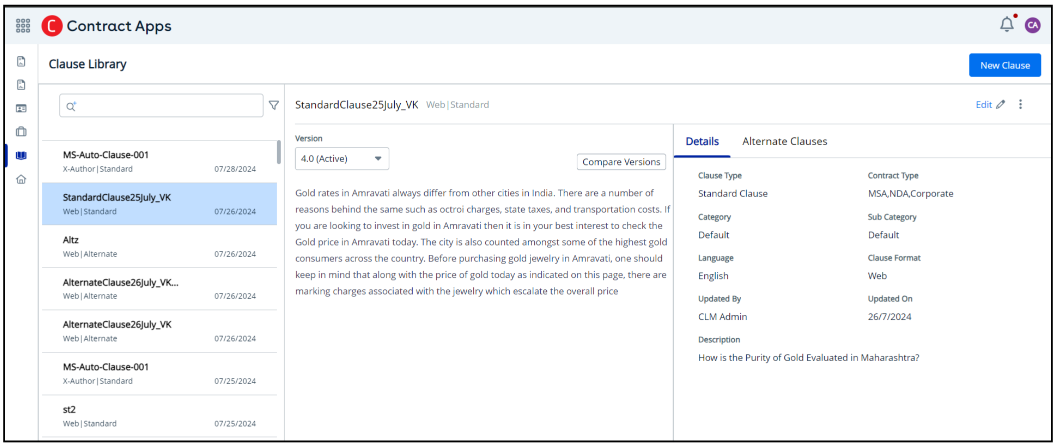
1. Go to Clause Library.
2. Select a clause.
3. Click the More icon ( ) and select **Clone**.
4. Update the required fields and click **Save**.
   The word Copy is appended in the name of the newly cloned clause.

Viewing Alternate Clauses

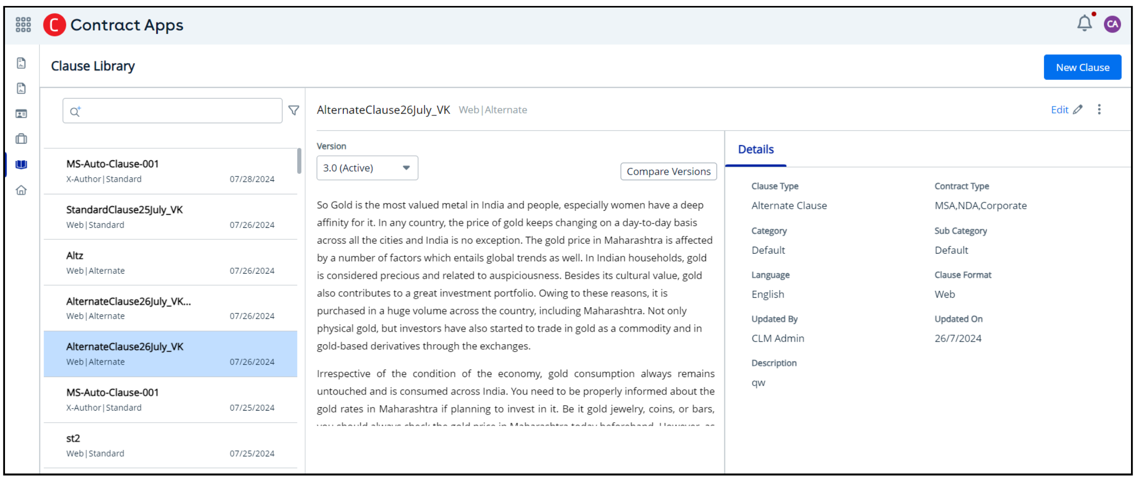
You can select a clause from the clause library and view the alternate clauses for that clause.

To view an alternate clause

1. Go to Clause Library.
   You can view a list of standard and alternate clauses.
2. Select a clause.
   a. If you select a standard clause, you can view the clause content and the following tabs.
      - Details: Displays the clause details
      - Alternate Clauses: Displays the list of available alternate clauses. Click the Expand icon ( ) to view the alternate clause text.



   b. If you select an alternate clause, you can view the clause content and only the **Details** tab.



> Alternate Clauses are displayed only for Web or X-Author standard clauses and not for Web or X-Author alternate clauses.

Comparing Clause Versions

You can compare versions of a clause.

Prerequisite: To view the Compare Versions button for a web standard or alternate clause, more than one clause version must be available.

Restriction: This feature is not available for X-Author standard and alternate clauses.

1. Go to Clause Library, select a clause and click **Compare Versions**.
   A popup opens and you can see the comparison between the latest version and the previous version of the clause.
   You can identify the added, replaced, or deleted clause text by the font color. The font color of the added or replaced clause text is green. The font color of the deleted clause text is red in color.
2. Click the Version dropdown to switch between various clause versions.
3. Click **Ok** to close the popup.

Viewing Activity History

A negotiation cycle for a contract can run for weeks, months, or sometimes a year. It is difficult for end users like sales users, contract managers, and legal users to remember the changes that happen to a contract. The activity history feature lets you track all the events and actions executed in a contract journey on the CLM application. From the Activity panel, you can track the activities performed on the contract. User details of who executed the action on the contract and the timestamp (date and time) are displayed chronologically.

You can see a record in the Activity History with the document version number when you perform any of the following actions:

- Create a contract through any of the following options:
    - Fill out a form
    - Import a document
        - By Import Documents
        - By Store Executed Contract
    - Intelligent Document Import

    - Bulk Import
- Generate a document
- Regenerate a document
- Import an offline document
- Generate a supporting document
- Upload a document
- Join a document
- Send a document for review
- Share a document for Microsoft 365 review as a link
- Mark a document review as completed
- Cancel a document review
- Clone a contract
- Activate a contract
- Terminate a contract
- Expire a contract
- Renew a contract
- Amend a contract
- Check a document in with redlines from X-Author for Contracts
- Check a document in without redline from X-Author for Contracts
- Check a document in as final to be signed from X-Author for Contracts
- Regenerate a document from X-Author for Contracts
- Create Offline Document from X-Author for Contracts
- Import Offline Document from X-Author for Contracts

To view activity history

1. Open the Contract Details page of a contract and click the Activity icon () displayed on the right hand side of the page.
2. The Activity panel opens. The records are displayed in chronological order of activity execution. Activities older than a month are in the Older category.

Viewing Related Contracts

A contract can have the following relationships with other contracts:

- the other contract is the parent of the current contract
- the other contract is a child of the current contract
- the other contract is created as a result of an amendment to the current contract
- the other contract is created as a result of renewal of the current contract

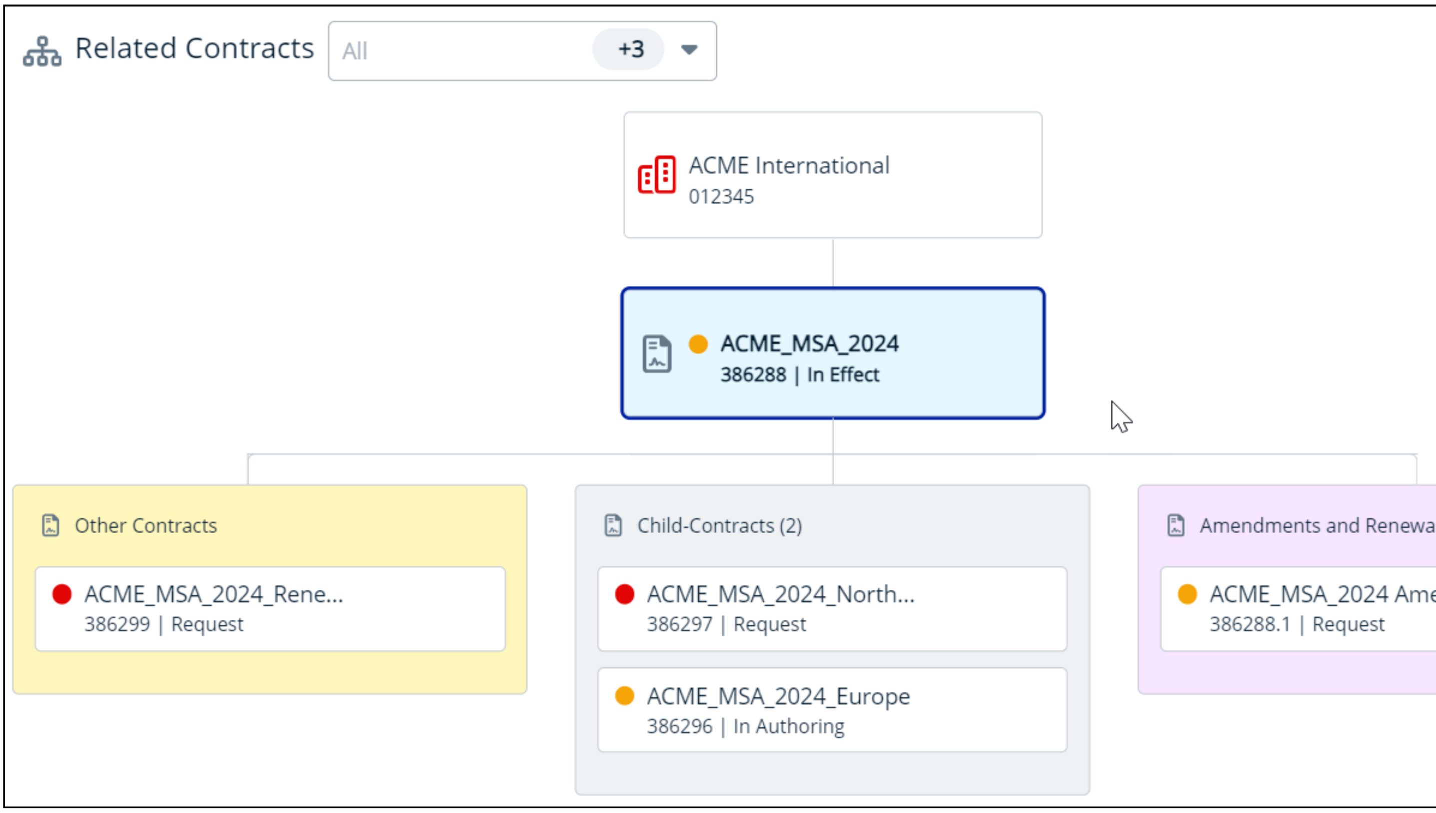
- the other contract is linked to the current contract using the Relationships link

Related Contracts tab in contract details displays the current contract relationship hierarchy.

To view related contracts

On the Contract Details page, click **Related Contracts**.

A hierarchy of all the contracts related to the current contract is displayed.



Cards for the following records related to the current contract are displayed:

- Account: Name and number of the account for which the contract is created
- Current Contract: Name, number and status category of the contract being viewed. Hover the mouse on the colored dot to view contract status.
- Other Contracts: List of contracts linked with the current contract using the Relationship link. Displays the name, number and status category of each contract. Hover the mouse on the colored dot to view contract status.
- Child Contract: List of contracts that have the current contract as parent. Displays the name, number and status category of each contract. Hover the mouse on the colored dot to view contract status.
- Amendments and Renewals: List of contracts amended or renewed using Amend or Renew contract actions, respectively. It also includes contracts generated during an

automatic renewal of the current contract. Displays the name, number and status category of each contract. Hover the mouse on the colored dot to view contract status.

Click **Related Contracts** list above the hierarchy and select required checkbox to view only specific related contracts.

Click Open icon ( ) to view a record in new window.

Record count is displayed, if there are more than one records for Child-Contracts group. When there are more than 3 parent contracts, the contracts are stacked under the View More card.

You can view the following fields displayed for the objects in the contract hierarchy card.

Working with Clauses

You can view all versions of a clause along with the modified text. You can also view the number of times the clause is revised.

A source action (clause status) is updated based on the action taken on a contract or a contract document. The following table describes various actions and their corresponding source action.

Action	Source Action
A clause is inserted in a contract document.	InsertedAsText
A smart clause is inserted in a contract document.	Inserted
A contract document is generated for a contract.	Original
A smart clause is modified in a contract document.	Modified
A clause is deleted in a contract document.	Deleted
A contract document is fully signed.	Final

Select one of the following topics for more information.

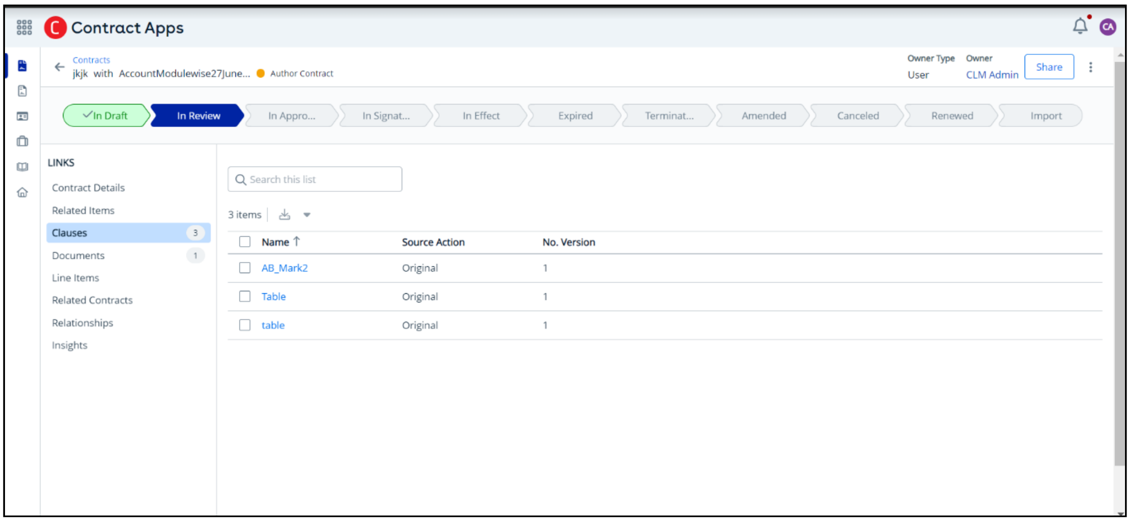
- Viewing Clause Details
- Comparing Clauses Versions
- Exporting Clause Records

Viewing Clause Details

Prerequisite

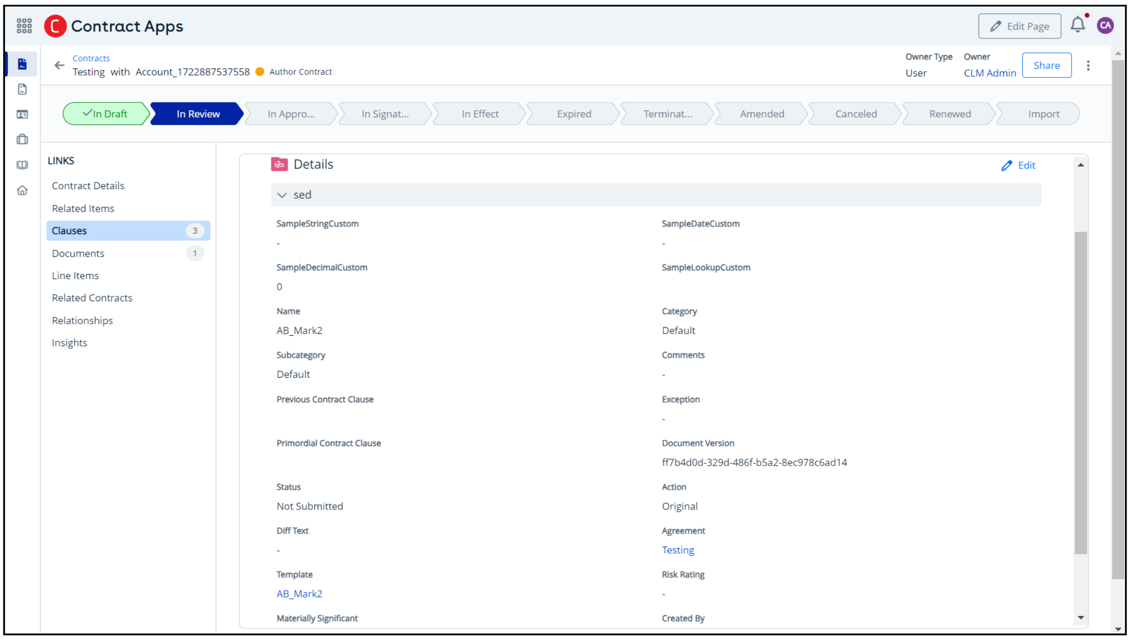
Ensure that clauses are available in a contract document that is added in a contract.

To view clause details

1. Go to the Contract Details page.
2. In the LINKS panel, click **Clauses**.
   The clause list page displays the clause name, source actions, and clause version number.
   

3. Click the clause name link to open the Clause Details page with the following tabs.
   - **Details**: Displays the clause fields (standard and custom fields) such as Name, Category, Previous Contract Clause, Primordial Contract Clause, Agreement, and so on.

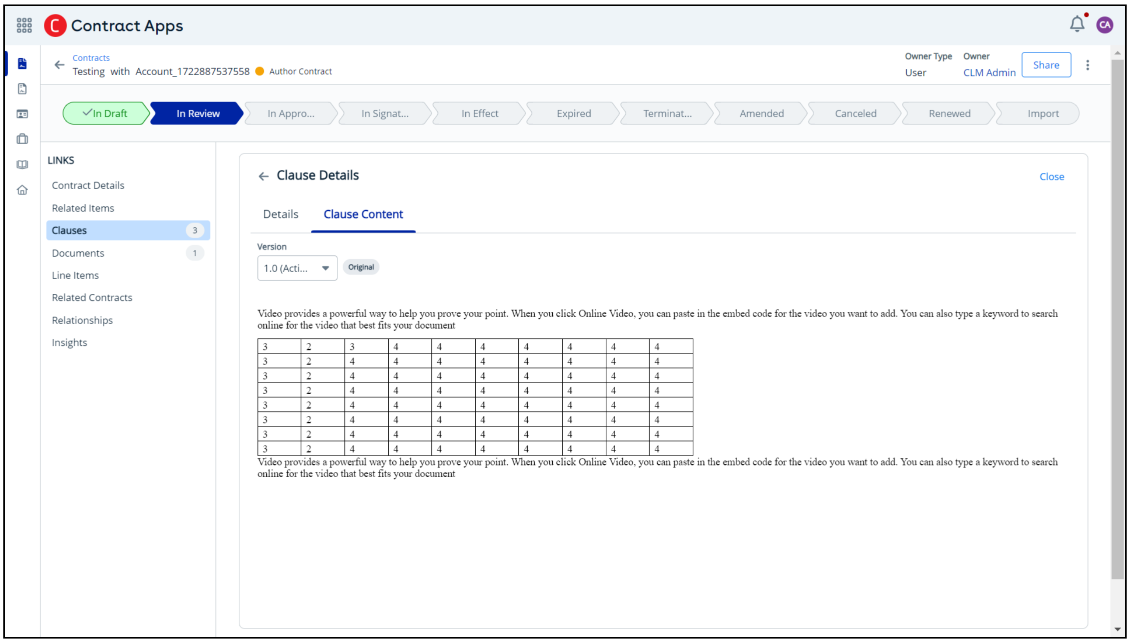
   > **Info**
   >
   > Click the **Edit Page** button in the page header to customize the appearance of the Details tab for the clauses. DETAILS VIEW tab opens up in CX Studio. For more information about how editing page layouts in CX Studio, see Managing Page Layout.



- **Clause Content**: Displays the clause text, clause version number drop-down, and the source action of the clause version.

> ⓘ The clauses are displayed in HTML format.

If the clause content contains a table, the data is displayed in table format as shown in the following image.

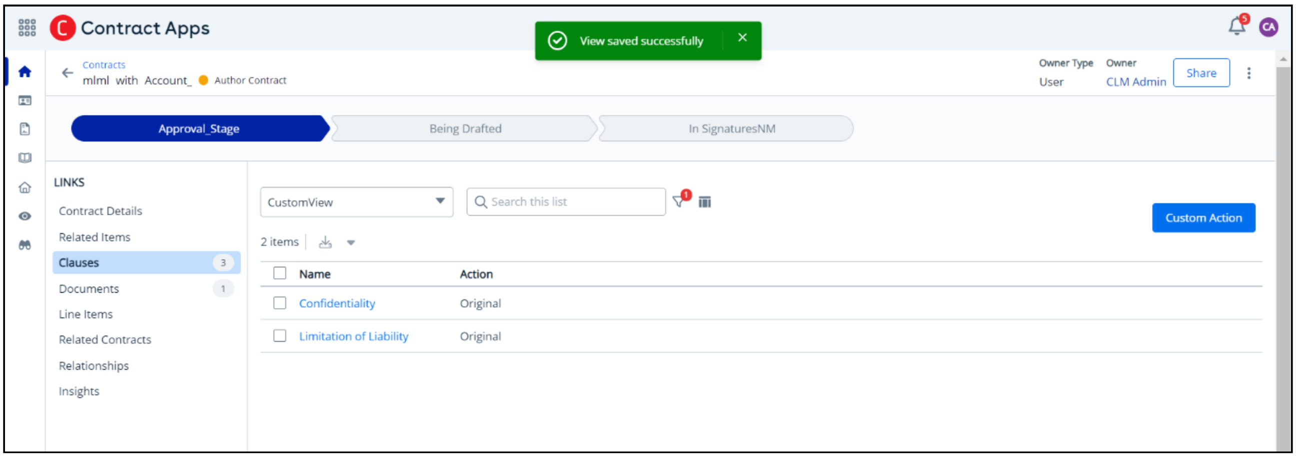


When you have more than one clause version, the **Compare Versions** option is displayed that allows you to compare two clause versions. For more information, see Comparing Clause Versions.

View Settings

View Setting allows you to control which columns are displayed in the grid and rearrange the column order. Click the **View Settings** ( ) icon to control the columns displayed in the grid. For more information, see Managing View Settings.

You can save your filtered view of a record and set as the default view to avoid reselecting the filters every time you open the grid (list) view. For more information, see Managing Views.



To edit clause details

1. Go to the Clause Details page.
2. Click the edit icon (Edit).

Note

- The edit icon is displayed only if there are custom fields in the page layout.
- You can edit only the fields for which Editable button is toggled on.

3. Update the required details and click **Save**.

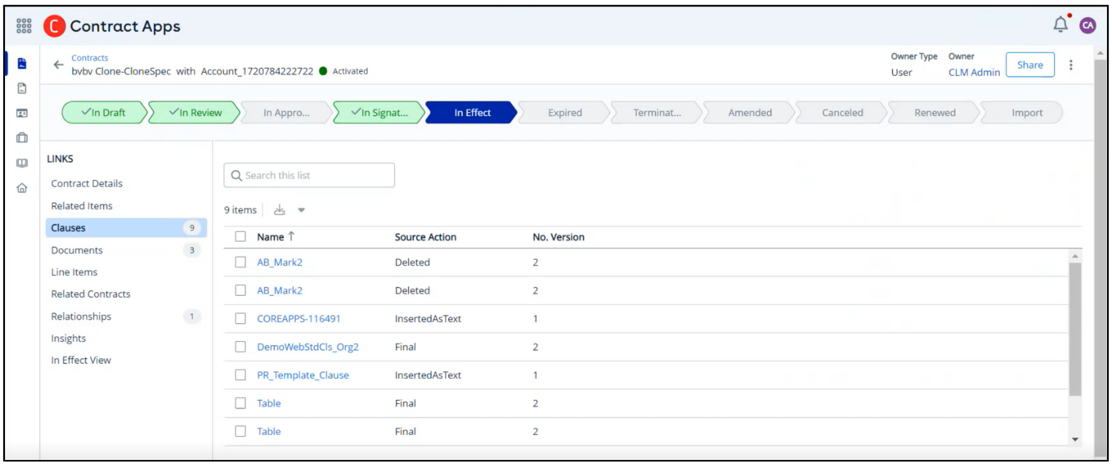
Comparing Clauses Versions

You can compare two clause versions.

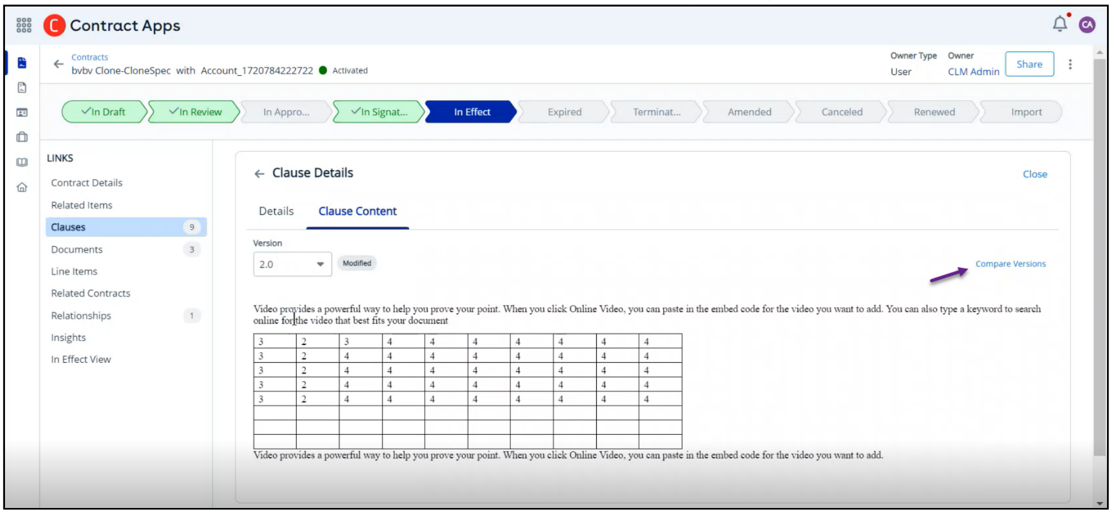
Prerequisite: To view the Compare Versions option for a clause, more than one clause version must be available.

To compare clause versions

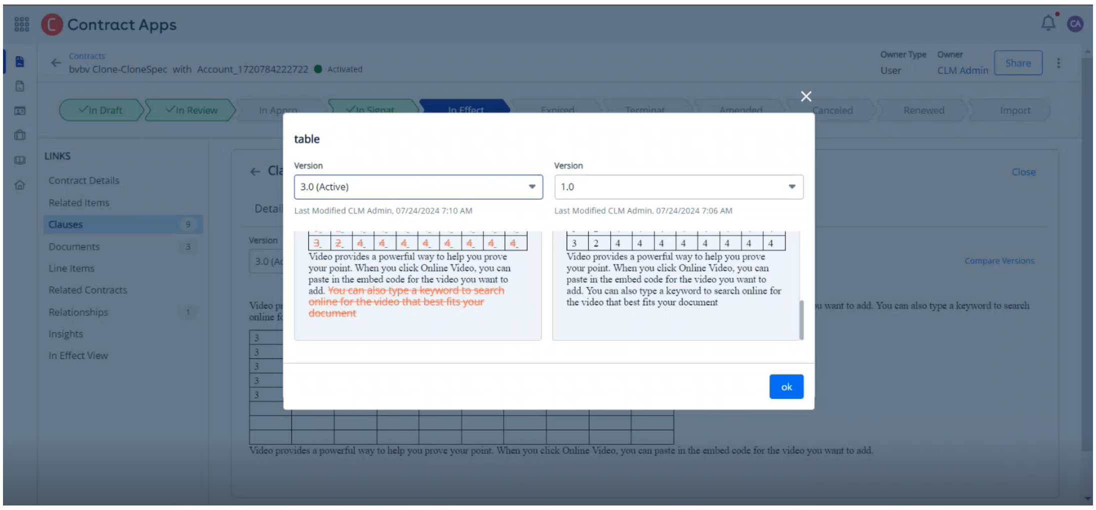
1. Go to the Contract Details page.
2. In the LINKS panel, click **Clauses**.
   The clause list page displays the clause name, source action, and clause version number.



3. Click the clause name link to open the Clause Details page.
   If a clause text is modified multiple times, you can see many clause versions in the **Version** drop-down list.
4. Click **Compare Versions** as shown in the following image.



5. A <clause name> popup appears and you can see the comparison between the latest version and the previous version of the clause.
   You can identify the added, replaced, or deleted clause text by the font color. The font color of the added or replaced clause text is green. The font color of the deleted clause text is red.



6. Select a version number from the **Version** drop-down list to switch between various clause versions.
7. Click **ok** to close the popup.

Exporting Clause Records

You can export a contract's clause records as a CSV or an Excel file.

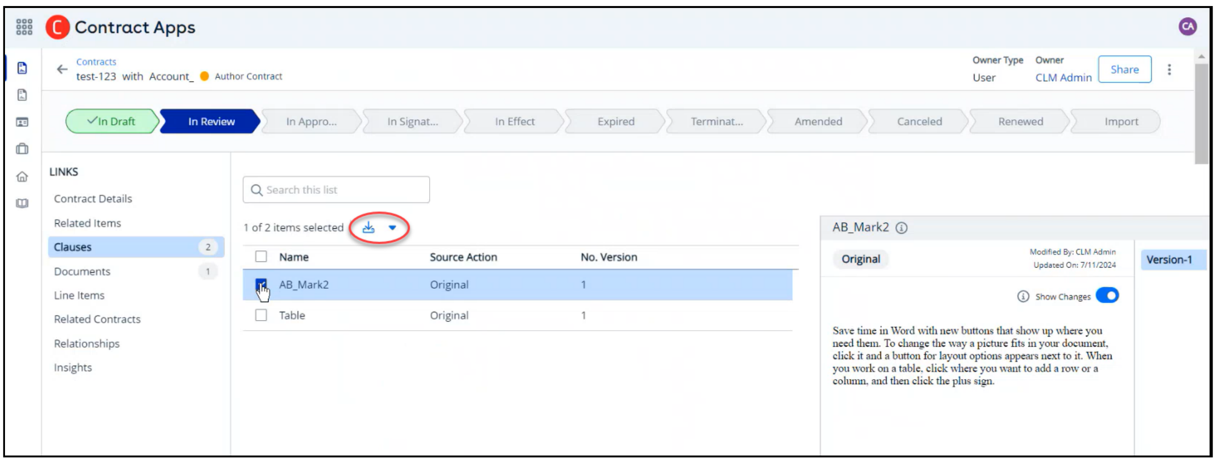
Prerequisite

Ensure that clauses are available in a contract document that is added in a contract.

To export clause records

1. Go to the Contract Details page.
2. In the LINKS panel, click **Clauses**.
   You can see the names of clauses, source actions, and clause versions.

> ⓘ When you select a clause, the Export icon ( ) appears.



3. Click the Export icon and select Export as CSV or Export as XLS to export the file.
4. The Save As dialog box appears. Edit the filename and save it locally.

1.

Working with Contract Terms

A contract term type categorizes specific conditions within a contract based on their nature and duration. The Contract Term Type dropdown on the Contract Details page provides four options: Perpetual, Coterminous, Fixed Term, and Auto Renew.

Each contract term type dictates contract behavior when specific conditions are met, automatically activating, expiring, or renewing the contract.

The following table describes the mandatory fields that must be populated when you select a particular contract term type and their impact on the contract.

Contract term type	Mandatory Fields	Impact on the contract
Perpetual	Contract Start Date ⓘ Contract End Date and Term Months fields are disabled.	A perpetual contract, also known as an evergreen contract, has no fixed end date. It continues indefinitely until one of the parties decides to terminate, expire, or cancel the contract manually.

Contract term type	Mandatory Fields	Impact on the contract
Coterminous	N/A The Contract End Date for the child contract is inherited from the parent contract.	Coterminous contracts refer to two or more agreements that have the same end date or termination date. These contracts are often used in business and legal contexts where multiple contracts need to be coordinated to end at the same time. Before you select the Coterminous option, ensure the current contract has a parent contract. If the parent contract has a different contract term type.

Contract term type	Mandatory Fields	Impact on the contract
Fixed term	• Contract Start Date • Contract End Date or Term Months When you update the Term Months field, the Contract End Date field is automatically calculated and populated by the date that is one day prior to the date derived by adding Terms Months to the Contract Start Date i.e. ((Start Date + Term) - 1 day)). If you want to enter a particular contract end date after entering term months, clear the Term Months field and select the required contract end date. Ensure Activated Date is greater than the Start Date.	A fixed-term contract specifies a definite period for the contract's validity. Auto-activate: When a contract Status is Fully Signed and reaches the Contract Start Date, the contract is automatically activated and the Status is updated to Activated. The timezone of the logged-in user and organization must be the same to automatically activate the contract. Auto-expire: When a contract passes the Contract End Date, the Contract is automatically expired and the Status is updated to Expired. An email is sent to the contract owner and primary contact stating that the contract term has ended.

Contract term type	Mandatory Fields	Impact on the contract
Auto Renew	• Contract Start Date • Contract End Date or Term Months When you update the Term Months field, the Contract End Date field is automatically calculated and populated by the date that is one day prior to the date derived by adding Terms Months to the Contract Start Date i.e. ((Start Date + Term) - 1 day)). If you want to enter a particular contract end date after entering term months, clear the Term Months field and select the required contract end date. Ensure Activated Date is greater than the Start Date.	An auto-renew contract term is an arrangement where the contract is designed to automatically renew for a subsequent period (often the same duration as the initial term). When you select the Auto Renew option, you can see the Renewal Terms field. You can enter all the renewal terms in the field. An email is sent to the contract owner and the primary contact stating that the contract is renewed. Renewal terms are also added as part of the email if available in the contract.

To set a contract term type

1. On the Contract Details page, click **Edit**.
2. In the Terms & Renewals section, click the **Contract Term Type** dropdown and select the required contract term type.
3. Click **Save**.

Working with Dashboard

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. CLM dashboard helps you visualize data as bar or pie charts in the following scenarios:

- How many Contracts are in effect in each contract type?
- How many Contracts are waiting for review in each contract type?

- How many Contracts expired in the last 30 days?
- How many Contracts will expire in the next 90 days?
- How much Contract value lies in each stage?
- How many Contracts exist in each contract type?

To work with Dashboard

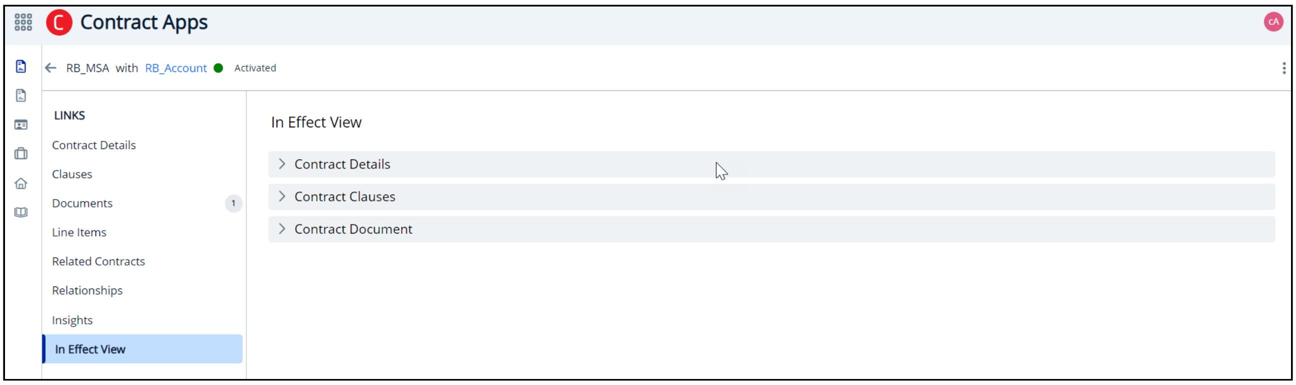
1. Click and select **Dashboard.**
2. Click the More () icon for a chart to perform the following tasks on Dashboard:
   a. Select Expand to zoom a chart view.
   b. Select Download to download the chart in JPEG format.
   c. Select Refresh to update the data in the chart.
3. Click a specific bar or segment of a chart to drill down to a more detailed report.
   The Contract List page is displayed according to the chart criteria. You can filter or select a contract to view the details of the contract.

Working with In Effect View

The In Effect View feature allows you to access essential information and contract data for the contracts that are currently in effect. You can review contract details, clauses, and documents from this view. Additionally, you can track amendments to view combined data from both the original and amended contracts that constitute the in-effect contract.

You can see the following details in each section of the In-Effect View:

- In the Contract Details section, you can view the Contract Field, Value, Contract Number, and Updated By details.
- In the Contract Clauses section, you can view the Clause Name, Contract Number, Updated By, and Modified On details.
- In the Contract Document section, you can view the Contract Name, Contract Number, and No. of Docs details.



Prerequisites

You can view In-Effect view for contracts having status category and status as In-effect and Activated, respectively and for the amended contracts.

To view the In-Effect View

1. Open an activated contract.
2. Click the **In Effect View** link.
   You can view Contract Details, Contract Clauses, and Contract Documents.

To view a contract field's change history

1. Go to In Effect View.
2. Click the expand icon ( ) for the Contract Details section.
3. Select a contract field.
   The Track Changes panel opens to the right and you can view all the field value changes performed after the contract was activated. You can view the In Effect and Previous Changes sections in the track changes panel. In the In Effect section, you can view the Value (current field value), ContractNumber, and UpdatedBy information. Under the Previous Changes section, you can view the Value (previous field value highlighted in yellow), ContractNumber, and UpdatedBy information. The Previous Changes section is only visible if the field value was modified. Click the **Contract Number** link to view the contract record in a new window.

To view a clause's versions and change history

1. Go to the In Effect View.
2. Click the expand icon ( ) for the Contract Clauses section.

3. Select a contract clause.
   The clause details panel opens to the right.
4. Click **Compare Versions** to compare the final clause version of the original contract and the final version of the clause in the amended contract.
   A popup opens and you can see the changes in the compared clauses. Click the **Contract Number** link to view the contract record in a new window.

To view contract documents

1. Go to the In Effect View.
2. Click the expand icon (>) for the Contract Document section. Contract documents associated for the contract are displayed.
3. The panel on the right displays a list of documents selected at the time of contract activation. Click the link to download a document.
4. Click the **Contract Name** link or the **Contract Number** link to view the contract in a new window.

Deleting a Contract

You can delete a contract when it is no longer required.

To delete a contract

1. On the Contract Details page, click the More icon (⋮) in the top right corner and select **Delete**.
2. On the "Delete Contract" popup, click **Confirm.**

Exporting Contract Details

Using the Export feature, you can download contract details to an Excel spreadsheet or a comma-separated values (CSV) file. The exported data contains the contract fields like Contract Name, Contract Number, Id, Contract Type, Account, Status Category, Status, Term Type, Owner, and Primary Contact.

To export contract details

1. Click the My Contracts tab.

2. Go to the required list page using pagination and select the contract records to be exported.
3. Click the download icon ( ) and select **Export as .CSV** or **Export as Excel** to export the records. The file is saved to the Downloads folder of the local machine.

You can also export contract details from the **Recently Viewed** tab.

> The Recently Viewed page displays contracts you viewed in the current login session. It does not display contracts if you clear the cache or log in again.

To export contract details from the recently viewed list

1. Click the Recently Viewed tab.
2. Go to the required list page using pagination and select the contract records to be exported.
3. Click the download icon ( ) and select **Export as .CSV** or **Export as Excel** to export the records. The file is saved to the Downloads folder of the local machine.

Viewing Contract Documents

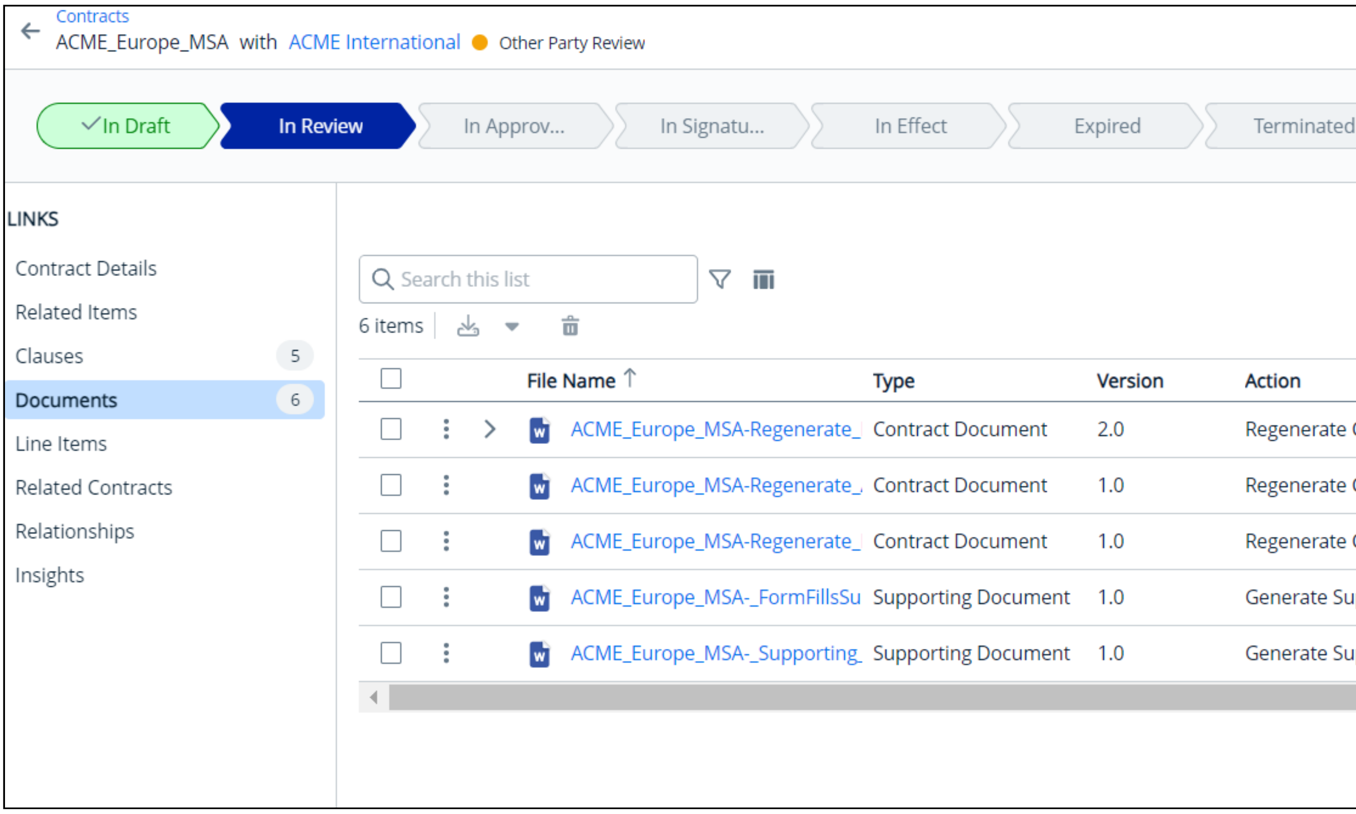
All documents associated with the contract are shown in the Documents tab. Here, you can view the latest version of a document and click the expand icon to view older versions, as well as delete documents to be excluded from the contract.

To view contract documents

1. Click **Documents** tab.
2. Conga CLM displays all documents generated for the contract versions, with the following information shown for each document:

> **Note**
>
> All versions of a Contract Document-type document are grouped. To view a document hierarchy, click the expand icon ( ) next to the document name.

Column Name	Description
File Name	Name of the document. The name is automatically assigned to a document based on the Document Naming Convention parameter configuration. For more information, see General Settings.
Type	Whether the document is a contract document or a supporting document.
Version	The version number is automatically assigned to the document and is also suffixed to the document name. The version assigned to the document when it is generated for the first time depends on the Initial Version parameter configuration in General Settings. This version number is incremented on generation of subsequent document versions.
Action	The action performed on the contract that caused this document's generation.
Last Updated	Date and time the document was last updated.
Status	Review status of the document. An "In Progress" status indicates the document has been sent for review. Such documents cannot be selected for action. A blank status indicates that the document can be selected for actions.
Document Actions	If Conga Contract Intelligence is installed in your environment, this column offers you documents imported to CLM using Intelligent Import.



3. Click the **View Settings** ( ) icon to control the columns displayed in the grid. For more information, see Managing View Settings.

The NEXT STEPS panel on the right displays the actions you can perform on the contract. The buttons displayed in the panel depend on the contract lifecycle stage.

To delete a contract document

1. Click the More icon ( ) next to the document name and click the delete icon ( ). Or, select the checkbox next to the document name and click the delete icon ( ).

To delete multiple contract documents

1. Select documents and click the delete icon ( ).

   > You can select only the latest version of the document.

2. On the Delete Record popup, click **Delete**.

Sharing Records with Users and User Groups

One or more users can access a record (contract, quote, and so on) based on user roles and permissions. Sometimes, users would like to share the record with other users or user groups in their organization. For example, a sales manager or legal person may want to share a specific record with one or more users, so that the other users can access the record and business continuity is ensured. Or, some users or user groups don't have access to a specific type of contracts such as MSA, need to verify or edit an MSA contract. In such scenarios, you can share the contract with users or user groups and grant them view or edit access on the contract.

Prerequisite

Administrator has:

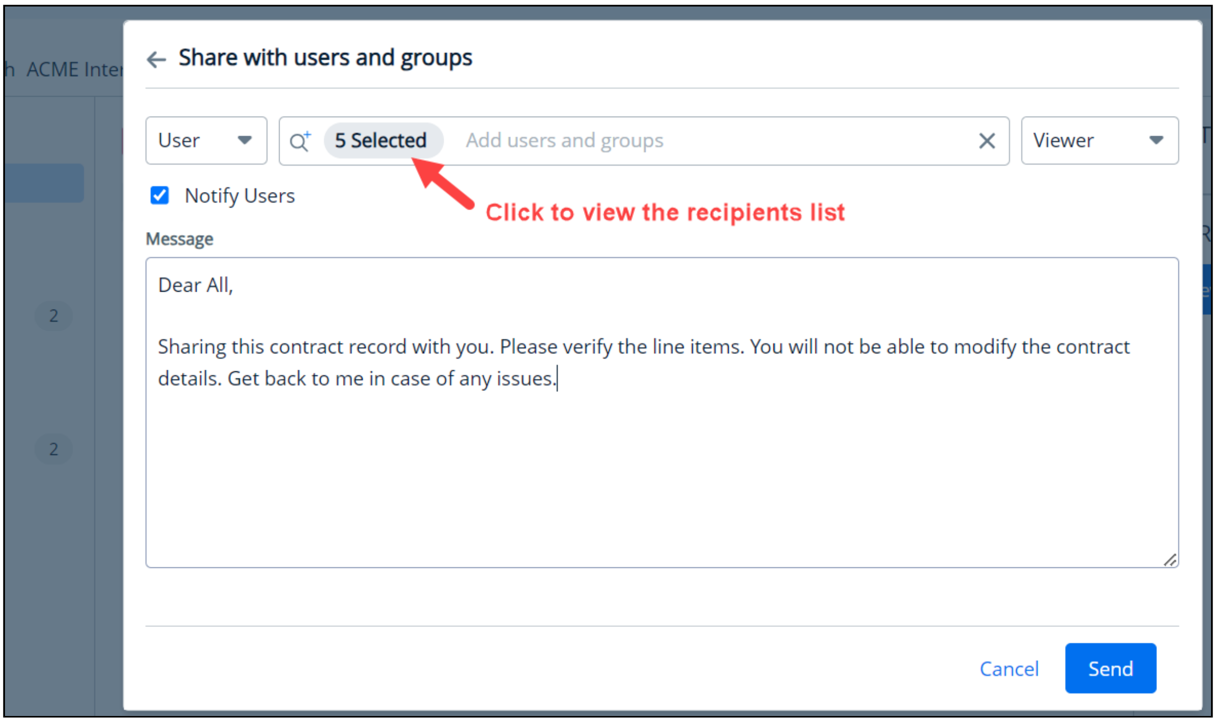
- Configured share permission and the Modify All attribute in object permission as true for the user sharing the record. For more information, see the description for Users module in Managing Admin Console.
- Configured Read and Update permission for the object as true for the permission groups associated with the users receiving the record. For more information, see the description for Users module in Managing Admin Console.

To share a record with other users or user groups

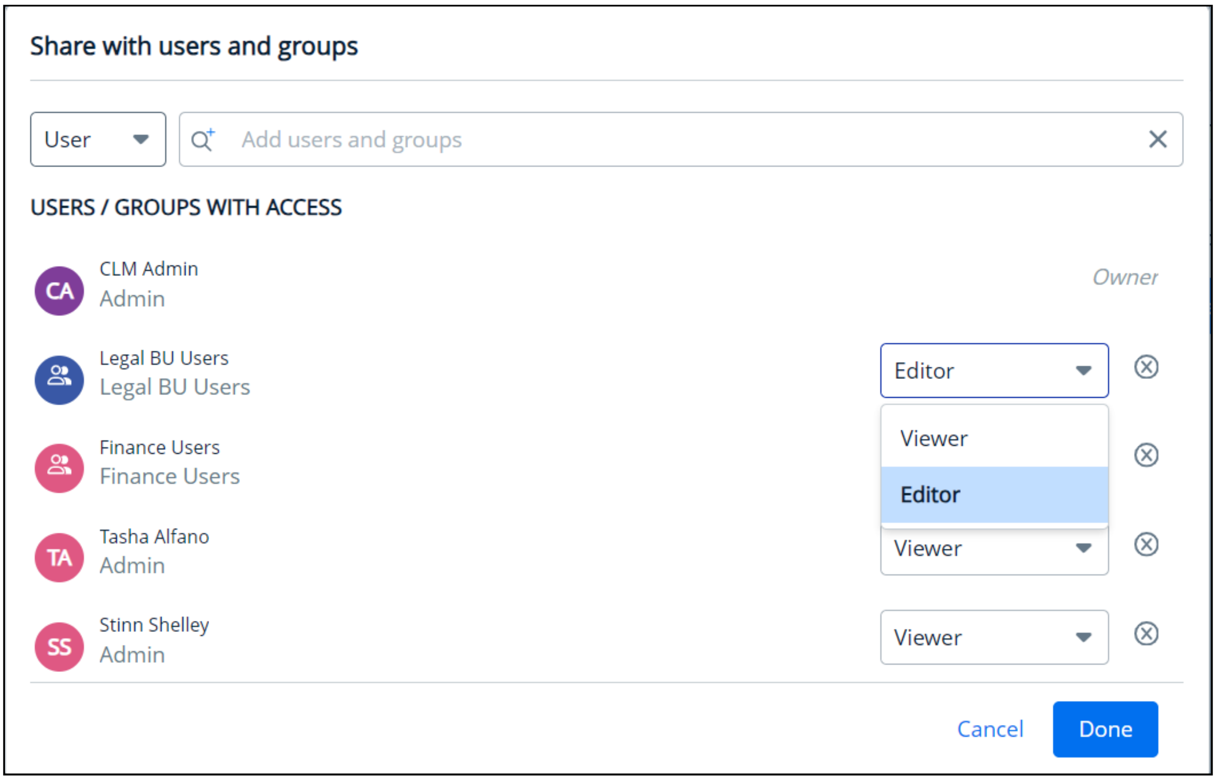
1. Click the App Launcher icon ( ) and select **Contracts Apps**.
2. Select a contract record and click the **Share** button at the top of the page. This raises the Share with users and groups window displaying the logged-in user details.
3. To add individual users for sharing the record, select User from the dropdown. To add user groups for sharing the record, select Group from the dropdown.
4. Search and select a specific user or user group from the Add users and groups text box.
5. Select Viewer or Editor from the dropdown to allow or restrict the recipients to editing the record.

> Recipients will not be allowed to edit the record if Update permission is not selected their permission group, even if Editor access is selected while sharing the record.

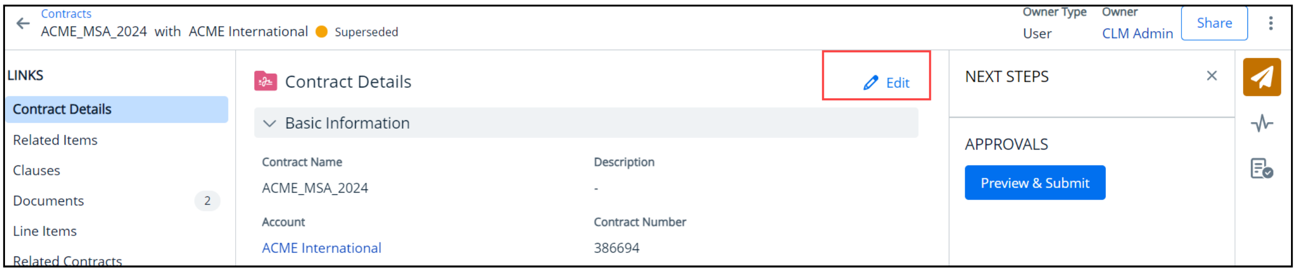
6. Select Notify Users and provide email body in Message textbox to send a notification to all the recipients.



7. Click **Send**. If you selected Notify Users checkbox, an email is sent to the recipients along with the message. The recipient list is displayed with the default access selected.
8. Select Viewer or Editor for a recipient to override the default access and click **Done**. To continue with the selection you made at the time of recipient selection click **Cancel**.



The user with whom the record is shared can view and edit the record as per the access granted. The Edit button is available in the Contract Details page if the record is shared with Editor access.



To revoke access on a record

1. Click the App Launcher icon ( ) and select **Contracts Apps**.
2. Select a contract record and click the **Share** button at the top of the page. This raises the Share with users and groups window with a list of recipients with whom the record is already shared.
3. Click icon next to the recipient to revoke access to the contract record.

The recipient is removed the list. The access that was was granted to the recipient is revoked. The recipient can not view or edit the record.

Working with Related Items

Customers have business information associated with a contract. They want this business information created as separate objects in the CLM application and its record linked to a contract.

Administrators can define the relationship between objects that signify how the parent object is connected to a related child object. Accordingly, the related objects are displayed on the parent object's contract details page.

Custom objects can be associated with a contract. Administrators must create custom objects as separate objects in the CLM application and link each record to a contract by creating a reference field.. For more information on creating a custom object and reference field, see Creating and Managing Objects and Creating and Managing Fields..

The Related Items tab on the contract details page displays a list of records from custom objects related to the record.

Use Case for associating custom objects with contracts

This use case describes how users can associate custom objects. In this case, the administrator creates custom objects, for example, Service Plan and Invoice, and associates them with a contract by creating a reference field.

The user wants to create and view one or more service plans associated with a contract. For this, an administrator must create a custom “Service Plan” object and link it to an account so that every account record captures invoice details.

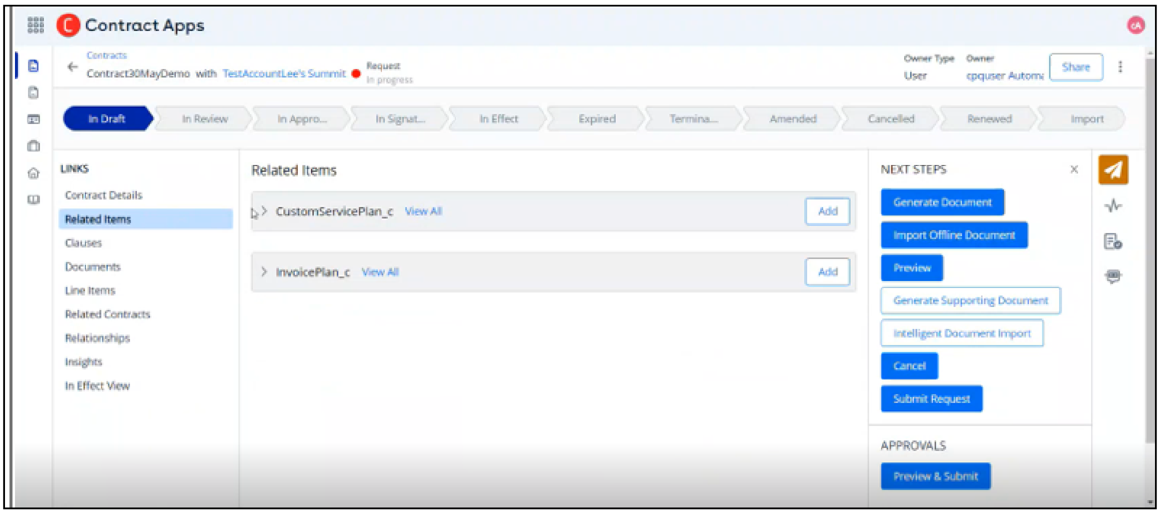
Prerequisite: The administrator has created a Service Plan custom object.

After the administrator has created the custom objects, users can view the custom objects in the contract details page.

To access Related Items

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Select a record to open the contract details page.

3. Go to the Related Items tab. This page displays the custom objects related to the contract.



To add a record to the custom object

1. Click the **Add** button available for the custom object.
2. Complete the fields in the Information section.
3. Click **Save**.

Click **View All** to sort and search the records.

To edit a custom record

1. Click the More icon (⋮) to edit a record.
2. Select **Edit** and update the required fields.
3. Click **Save**.

To delete a custom record

1. Click the More icon (⋮) and select **Delete**.
2. In the Delete <custom object name> window, click **Confirm**.

Result

Users can view the custom objects in the Related Items tab and they can add, edit, or delete a record associated with the custom object.

Using Smart Search

Smart Search returns a list of documents that match your search queries, from any records, regardless of where they are stored.

The search feature enables you to:

- Search information using keywords.
- Preview the document.
- Download the document.
- Export the document.
- Apply filters and conditions to narrow down the search results.

> You can preview .pdf, .txt, and .png file formats and download them. However, you can directly download other file formats.

Select one of the following topics for more information.

- Searching Contract Documents
- Previewing Contract Documents
- Exporting Contract Documents

Searching Contract Documents

You can use the **Search** tab on the left panel of the Contracts page to search content in CLM. The Search page displays a list of contracts. You can click the contract name link to view the Contract Details page.

This feature allows you to search for information. You can use keywords available in the content of the contract documents to search the content in CLM.

To search contract documents

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Click the **Search** tab on the left panel of the Contracts page.
3. In the search box, enter a search term in the search bar and press Enter.

To search contract documents across multiple objects

You can perform a multi-object contract search by defining the search criteria using multiple-objects field.

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Click the **Search** tab on the left panel of the Contracts page.
3. Click the filter icon ( ) to apply filters to your search results.
   The filter popup is displayed.
4. Select an object from the **Primary Object** drop-down list. The available options are:
   - Contract
   - Contract Document
   - Contract Clause
   - Account

- Contract Insight

5. Select one of the following options from the **Take action when** drop-down list.
    - All conditions are met
    - Any condition is met
    - Provide expression

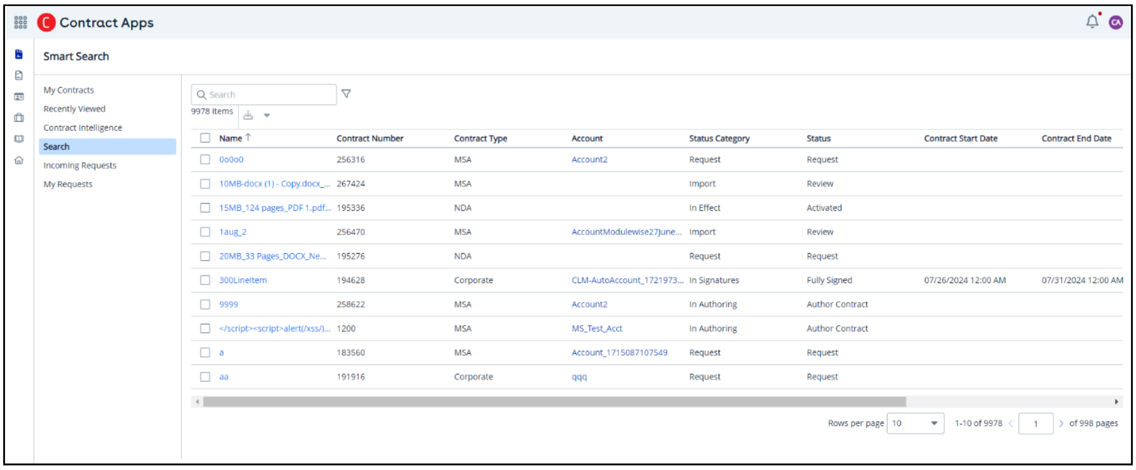
    > To add logic to the **Provide expression** option, you can use the following in the **Custom logic** field.
    > - Numbers to refer to each condition
    > - AND or OR to identify which combination of conditions must be true
    > - Parentheses to group parts of the string together
    >
    > Sample expression: `((1 AND 2) OR 3)`

6. Click **Add Criteria** to add a criterion.
    a. **Field**: Select a field from the drop-down list to be used in the filter criteria. The fields displayed are according to the primary object selected.
    b. **Operator**: Select an operator from the drop-down list. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
    c. **Value**: Enter the value of the field. The type of value field depends on the field selected.
7. To add another filter, click **Add Criteria** and repeat steps 6 (a), 6 (b), and 6 (c).
8. Click **Add related objects** to add a related contract object.
9. Select a related object from the **Select a related object** drop-down list.
10. Select one of the following options from the **Take action when** drop-down list.
    - All conditions are met
    - Any condition is met
    - Provide expression

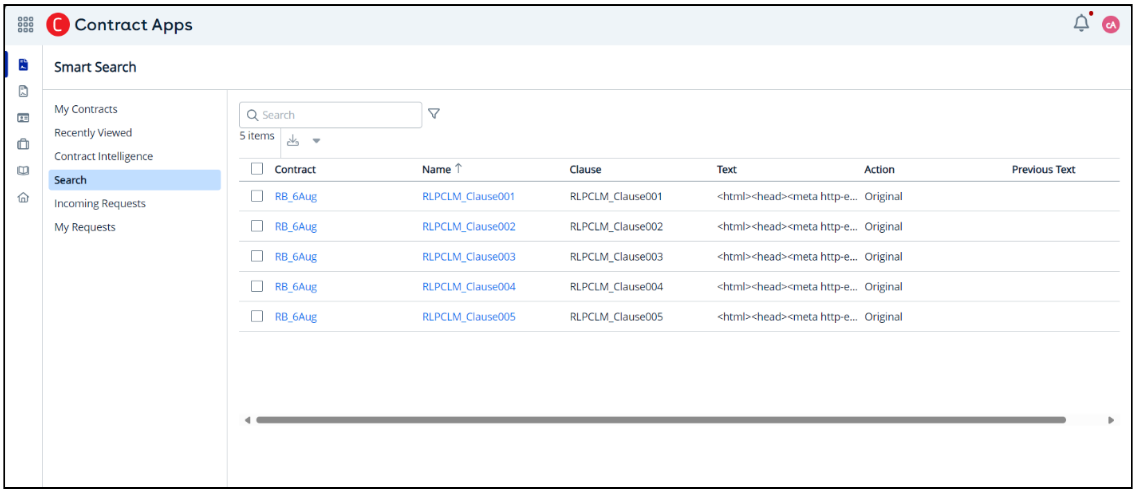
    > To add logic to the **Provide expression** option, you can use the following in the **Custom logic** field.
    > - Numbers to refer to each condition
    > - AND or OR to identify which combination of conditions must be true
    > - Parentheses to group parts of the string together
    >
    > Sample expression: `((1 AND 2) OR 3)`

11. Click **Add Criteria** to add a criterion.
    a. **Field**: Select a field from the drop-down list to be used in the filter criteria. The fields displayed are according to the related object selected.

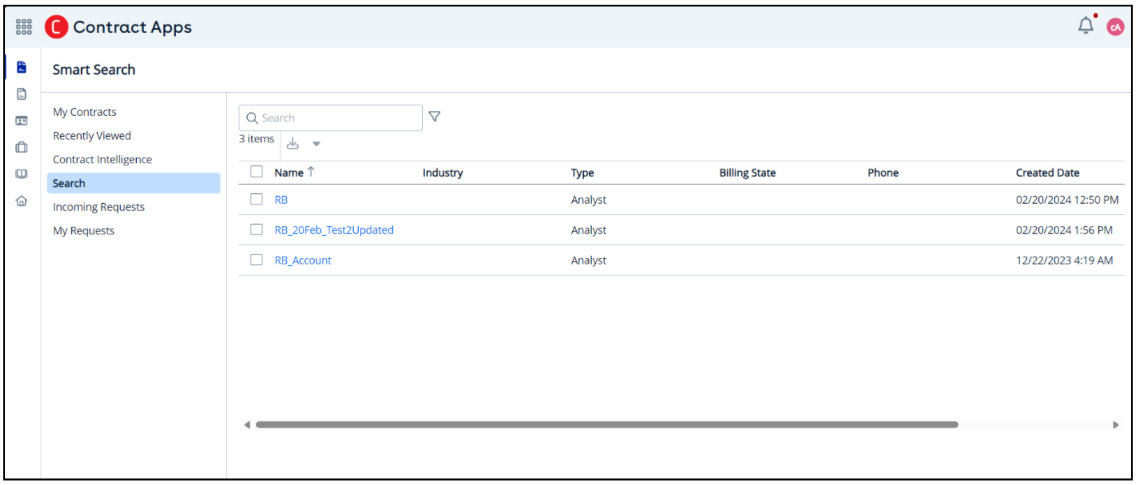
   b. **Operator**: Select an operator from the drop-down list. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
   c. **Value**: Enter the value of the field. The type of value field depends on the field selected.
12. Click **Add Criteria** to add a criterion or click **Add related objects** to add a related contract object.
13. Click **Apply**. The search results are displayed according to the primary object specified in the search criteria.
    - When the search results are displayed based on Contract as the primary object, clicking the contract name link opens the Contract Details page.



    - When the search results are displayed based on Contract Clause as the primary object, clicking the contract name link opens the Contract Details page.

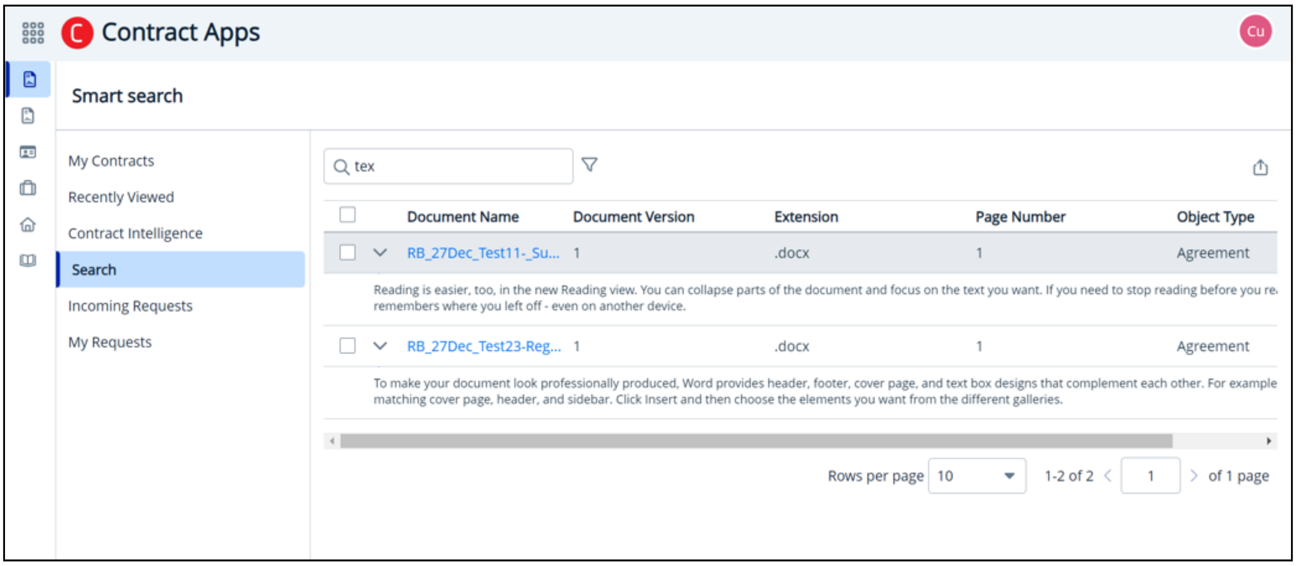


    - When the search results are displayed based on Account as the primary object, clicking the account name link opens the Account Details page.



To search a content snippet

When you search with a keyword, the page displays your search results. Click the expand icon (>) to view the content snippet containing the search keyword.



Previewing Contract Documents

You can preview the content of a document saved as .pdf, .txt, and .png. In the Preview window, you can scroll through the document and search the document to locate text or values. You can also print and download the document.

To preview and download a document:

1. Select the document to preview. The Preview window displays the document.
2. Click the **Download** button and save the document in your local folder.
3. Click the close icon (╳) to close the Preview window.

Exporting Contract Documents

On the **Search** tab,, you can export a list of documents to an Excel spreadsheet or a CSV file. You can also export documents according to the search criteria. This feature allows you to export contracts, contract clauses, contract insights, and accounts (out-of-box fields and custom fields) along with out-of-box and custom field filter criteria based on contract, contract clauses, contract insight, and account objects.

To export contract documents:

1. Click the App Launcher icon ( ) and select Contract Apps.
2. Go to the **Search** tab, and click the Export icon ( ) available in the top right corner.
3. Select the file format (XLS or CSV) option to export the document.
4. Enter the file name in **File Name**.
5. Click **Export** and save the file to your local folder.

Working with Contract Requests

A contract request enables users without contract creation permissions to raise contract requests.

Select one of the following topics for more information.

- Contract Requests Interface
- Creating a Contract Request
- Searching Contract Requests
- Editing a Contract Request
- Deleting a Contract Request

Contract Requests Interface

The Contract Request feature in CLM enables users without contract creation permissions to raise contract requests. This section provides information on the contract requests interface.

Navigating to the Contract Requests page

Access Contract Apps from the app launcher on the UI and go to the **My Requests** tab. On this tab, all the existing contract requests are listed along with their details such as **Request Name**, **Contract Name, Contract Type**, **Status**, **Description, Created On**, and **Modified On**. There are various functionalities available for you to manage the contract requests.

Sorting Contract Requests

You can sort the contract requests by clicking the column names. You can sort the contract requests based on **Request Name**, **Contract Type**, **Status**, **Created On**, and **Modified On**. The contract requests are sorted by the last modified date in descending order. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till the two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **Create New Request** to create a contract request. For more information, see Creating a Contract Request.
- Click the contract name link to open the **Contract Details** page.

Results per page

At the bottom of the page, you can view the total count of contract requests available. You can control the number of contract requests to be displayed on each page. By default, you can view 10 records on each page.

By default, you can view 10, 20, 30, 50, and 100 contract requests per page using the **Rows per page** drop-down list. This feature works in association with the search and filter functions to display search records per page. You can use the Next (**>**) and Previous (**<**) buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating a Contract Request

To create a contract request

1. Click the App Launcher icon ( ) and select **Contract Apps.**
2. Go to the **My Requests** tab and click **Create New Request**.
3. Enter values in the details.

> Fields marked with * are required.

Field	Description
Contract Request Name *	Enter the contract request name.
Contract Type *	Select the contract type from the drop-down menu. The available options are: • NDA • MSA The default contract type is NDA.
Requester	Search and select the requester's name.
Description	Enter the description.

4. Click **Next** to display the Contract Request page.
5. Enter the following details in the **Basic Information** section.

> - Contract Name, Contract Number, and Contract Type fields are auto-populated.
> - By default, the contract name is populated with the contract request name. To edit the contract name, see Editing a Contract Request.

Field	Description
Contract Number	Unique non-editable number assigned to the contract request by the system. To edit this field before you submit the contract request form, an administrators must turn the "Editable Contract Number for Contract Request Form" setting on. For more information, see General Settings.
Account *	Search and select the account name.
Contract Category	Select a contract category from the drop-down list.
Total Contract Value	Enter the total contract value.

Field	Description
Parent Contract	Enter the parent contract.
Executed Date	Specify the executed date.
Owner Type	Select the owner type from the drop-down list.
Owner	Search and select the owner.
Send email notification for owner change	Turn this setting on to send an email notification for owner change.
Primary Contact	Enter the primary contact.

ⓘ The values in the Status and Status Category fields are automatically updated as In Progress or Request based on whether the contract request is in progress or submitted.

6. Click **Next** and enter the following details in the **Terms & Renewals** section.

Field	Description
Contract Start Date	Select the contract start date.
Time	Specify the contract start time.
Contract End Date	Specify the contract end date.
Time	Specify the contract end time.
Term Months	Enter the contract term in months.
Contract Term Type	Enter the contract term type.
Renewal Term	Enter the renewal term.

7. Click **Next** and enter the following details in the **Key Dates** section.

Field	Description
Retention Date	Specify the contract retention date.
Time	Specify the retention time.
Activated Date	Specify the contract activated date.
Time	Specify the activated time.

8. Click **Next** and enter the following details in the **Miscellaneous** section.

Field	Description
Termination Date	Specify the contract termination date.
Time	Specify the termination time.
Termination Notice Days	Enter the contract termination notice in days.

9. Click **Next** and upload the files in the **Upload Documents** section. You can drag and drop multiple files.

- Supported file formats are .doc, .docx, .pdf, .png, .rtf, and .txt.
- A maximum of ten files can be uploaded at a time.

When you click the **Close** button, the Unsaved Changes window appears. Select one of the following options.
- **Close & Save**: The details entered are saved and redirect you to the Contract Request list view.
- **Close & Discard Changes**: The details entered are not saved and you are redirected to the Contract Request list view.

10. Click **Next** to view the Summary section. You can view a summary of all details entered in previous sections.
11. Click the Edit icon ( ) next to the section name to edit the details of that section.
12. Ensure the details entered are correct and then click **Submit.** This creates a new contract request and takes you to the Contract Details page. The values of the Status and Status Category fields on the Contract Details page are are both updated to "Request".

- The contract request's status is updated to Submitted on the contract request list page.

- You can create multiple contract requests with an In Progress status.
- You can open an "In Progress" contract request and edit its details.

Searching Contract Requests

You can search contract requests on the contract request list page using the basic search or advanced search.

To search contract requests

1. On the contract requests list page, enter a search term in the search bar and press **Enter**.
2. Click the Advanced Search icon ( ) to apply filters to your search results and results and display the Advanced Search window.
3. Click **Add Criteria**.
4. Select a field to be used in the filter criteria.
5. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
6. Enter the value of the field. The type of value field depends on the field selected.
7. To add another filter, click **Add Criteria** and repeat steps 4, 5, and 6.

   Click the delete icon ( ) next to the search query to remove the search criteria.
   Click **Remove All** to remove multiple search criteria.

8. Click **Apply**. CLM returns the accounts that match the criteria.

Editing a Contract Request

You can edit the fields in a contract request after you have created the contract request.

To edit a contract request

1. Click the App Launcher icon ( ) and select **Contract Apps**.

2. Go to the **My Requests** tab and click the contract name link to open the Contract Details page.
3. Click the Edit icon (Edit)and update the required details.
4. Click **Save**.

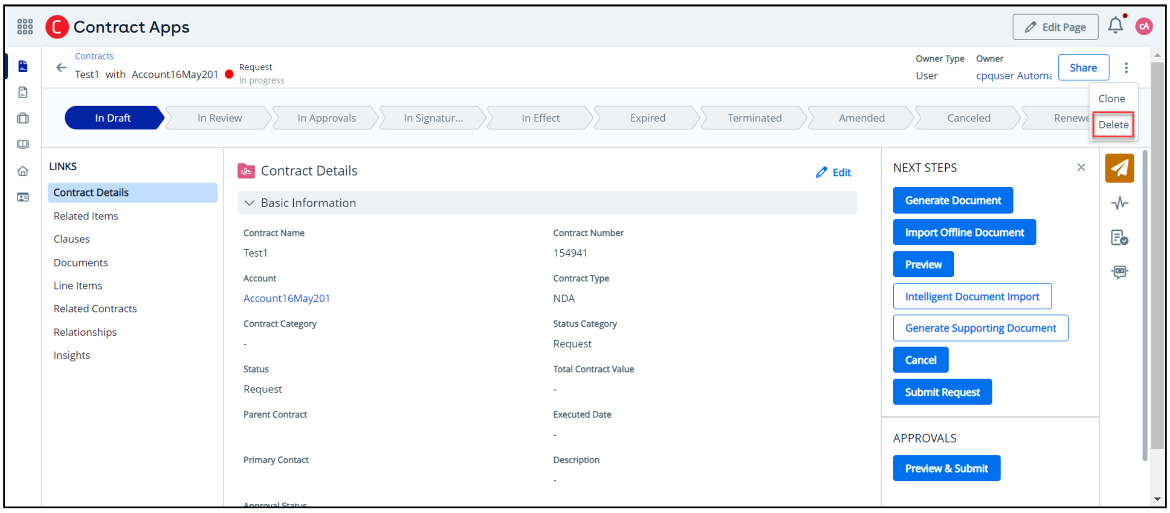
> After creating a contract request, the contract name is populated with the contract request name. You can edit the contract name field and the contract request name remains unchanged. Any changes made to the contract name are independent of the contract request name.

Deleting a Contract Request

You can delete a contract request from a list of contracts.

To delete a contract request

1. Click the App Launcher icon ( ).
2. Select **Contract Apps** from Shared Apps.
3. On the **My Requests** tab, click the document link to open the Contract Details page.



4. Click the More icon ( ) and select **Delete**.
5. On the Delete Contract window, click **Yes**.

Working with Incoming Requests

Access Contract Apps from the app launcher on the UI and go to the **Incoming Requests** tab. On this tab, you can view all the incoming requests whose status and status category is Request. This tab is available only to the administrator or users with permission to approve the requests.

Select one of the following topics for more information.

- Managing Incoming Requests
- Searching Incoming Requests
- Deleting an Incoming Request

Managing Incoming Requests

The following functionalities are available for you to manage the incoming requests.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order. Click the **View Settings** ( ) icon to control the columns displayed in the grid. For more information, see Managing View Settings.

You can save your filtered view of a record and set as the default view to avoid reselecting the filters every time you open the grid (list) view. For more information, see Managing Views.

Sorting Incoming Requests

You can sort the incoming requests by clicking the column names. The incoming requests are sorted by the last modified date in descending order. When you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till the two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Results per page

At the bottom of the page, you can view the total count of contract requests available. You can control the number of contract requests to be displayed on each page. By default, you can view 10 records on each page.

By default, you can view 10, 20, 30, 50, and 100 contract requests per page using the **Rows per page** drop-down list. This feature works in association with the search and filter functions to display search records per page. You can use the Next (>) and Previous (<) buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Actions available on the Incoming Requests page

Click the **contract name** or **Id** link to open the **Contract Details** page.

Searching Incoming Requests

You can search contract requests on the contract request list page using the basic search or advanced search.

To search incoming requests

1. On the incoming requests list page, enter a search term in the search bar and press **Enter**.
2. Click the **Advanced Search** icon ( ) to apply filters to your search results and display the Advanced Search window..
3. Click **Add Criteria**.
4. Select a field to be used in the filter criteria.
5. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
6. Enter the value of the field. The type of value field depends on the field selected.
7. To add another filter, click **Add Criteria** and repeat steps 4, 5, and 6.

   > Click the delete icon ( ) next to the search query to remove the search criteria.
   > Click **Remove All** to remove multiple search criteria.

8. Click **Apply**. CLM returns the accounts that match the criteria.

Deleting an Incoming Request

You can delete an incoming request from a list of contracts.

To delete an incoming request

1. Click the App Launcher icon ( ).
2. Select **Contract Apps** from Shared Apps.
3. On the **Incoming Requests** tab, select the row to delete.
4. Click the More icon ( ) and select **Delete**.
5. On the Delete Contract window, click **Confirm**.

Managing Accounts

Accounts contain information about customers or individuals with whom you conduct business.

This section covers the following topics.

- Accounts Interface
- Creating an Account
- Deleting Accounts
- Searching Accounts
- Managing Account's Contact Details
- Managing Account's Contract Details

Accounts Interface

You can access your account by logging in to your Conga platform. This section provides information about the accounts interface.

Navigating the Accounts page

When you launch the Accounts page on the UI, you can view the following tabs.

- **My Accounts**: By default, the Accounts page displays the My Accounts tab. On this tab, all the accounts created by you are listed on this page along with their details.
- **Recently viewed**: You can view the list of accounts that you recently viewed.
- **All Accounts**: You can view the list of accounts created by other users only if you have access rights.

There are various functionalities available for you to manage the accounts.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, press Ctrl-Click or Shift-Click to highlight the columns, then click the left and right arrows.
5. To add or remove all columns, click **Insert All** or **Remove All**.
   At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid.

To rearrange columns in the grid

1. Click the **View Setting** icon ( ) to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Sorting accounts

You can sort the accounts by clicking the column names. You can sort the accounts based on **Account Name**, **Account Type**, and **Created Date**. The accounts are sorted by the last modified date in descending order. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till the two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **New Account** to create an account. For more information, see Creating an Account.
- Click the account name link to open the **Account Details** page.
- Click the More icon (⋮) next to an account name to edit or delete an existing account.

Results per page

At the bottom of the page, you can view the total count of accounts available. You can control the number of accounts to be displayed on each page. By default, you can view 10 records on each page.

By default, you can view 10, 20, 30, 50, and 100 accounts per page using the **Rows per page** drop-down list. This feature works in association with the search and filter functions to display search records per page. You can use the Next (>) and Previous (<) buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating an Account

To create a new account

1. Click the App Launcher icon ( ).
2. Select Accounts from Shared Apps.
3. Click **New Account.**
4. Populate the following fields in the **Account Information** section.

   ⓘ Fields marked with * are mandatory.

Field	**Description**
Account Name*	Enter the account name
Account Number*	Enter the account number

Field	Description
Account Owner*	Enter the account owner's name
Account Source*	Select the account source from the drop-down menu
Account Type*	Select the account type from the drop-down menu
Account Currency*	Specify the first three letters of the required account currency. Matching currencies are displayed in the list. Select the required account currency.
Primary Contact	Select the primary contact from the drop-down. If the required contact doesn't exist, create it using the Accounts feature. For more details, refer Creating a Contact.
Parent Account	Enter the parent account details
Status	Select Active or Inactive from the drop-down menu If the account is in **Inactive** status, the user can change the status to **Active**, based on the business requirement.
Account Phone	Enter the phone number
Account Site	Enter the site name where the account is held
Fax	Enter the fax number

5. Populate the following fields in the **Additional Information** section.

Field	Description
Industry	Select the industry type from the drop-down menu
Annual Revenue	Enter the annual revenue amount
Description	Enter the description

6. Populate the following fields in the **Address Information** section.

Field	Description
Shipping Address	Enter the address where your customer wants to receive the products
Shipping Street	Enter the street name
Shipping City	Enter the city name
Shipping Province/ State	Enter the province or state name
Shipping Postal Code	Enter the postal code
Shipping Country	Enter the country name
Billing Address	Enter the address where your customer wants to receive the invoice
Billing Street	Enter the street name
Billing City	Enter the city name
Billing State	Enter the state details
Billing Postal Code	Enter the postal code
Billing Country	Enter the country name

7. Click **Save**. An account is created.

> You can create a contract for this account immediately after account creation by clicking **New Contract** on the Accounts Details page. For more information, see Creating a Contract.

Deleting Accounts

You can select one or more accounts from a list of accounts and delete them.

To delete an account

1. Click the App Launcher icon ( ).
2. Select **Accounts** from Shared Apps.
3. On the My Accounts tab, click the account name link to open the Account Details page.
4. Click the More icon ( ) in the upper-right corner and select **Delete**.
5. On the Delete Account window, click **Confirm**.

To delete multiple accounts

1. On the **My Accounts** tab, select the accounts to delete.
2. Click the delete icon ( ) to display the Delete Account window.
3. Click **Confirm**.

Searching Accounts

You can search accounts on the accounts list page using the basic search or advanced search.

To search accounts

1. On the accounts list page, enter a search term in the search box and press **Enter**.

   > You can search based on the account name.

2. Click the Advanced Search icon ( ) to apply filters to your search results and display the Advanced Search window.
3. Click **Add Criteria**.
4. Select a field to be used in the filter criteria.
5. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
6. Enter the value of the field. The type of value field depends on the field selected.
7. To add another filter, click **Add Criteria** and repeat steps 4, 5, and 6.

> Click the delete icon ( ) next to the search query to remove the search criteria.
> Click **Remove All** to remove multiple search criteria.

8. Click **Apply**. CLM returns the accounts that match the criteria.

Managing Account's Contact Details

Access Accounts from the app launcher to view the contacts associated with an account.

To view the contact details of an account:

1. Click the App Launcher icon ( ).
2. Select Accounts from Shared Apps.
3. Click the account name link to open the **Account Details** page.
4. Select the Contacts tab. You can view the list of contacts associated with the account.

> Select the **View All** button to display more than 50 records.

5. Click the contact name link to open the Contact Details page.

To edit a contact associated with an account

1. Click the account name link to open the **Accounts Details** page.
2. On the **Contacts** tab, click the More icon ( ) next to the contact you want to edit.
3. Select **Edit.**
4. Update the required details and click **Save**.

To delete a contact associated with an account

1. Click the account name link to open the **Accounts Details** page.
2. On the **Contacts** tab, click the More icon ( ) next to the contact you want to delete.
3. Select **Delete**.
4. On the "Delete Agreement" popup, click **Confirm**.

Search Account's Contact details

You can search for contact details of an account using the basic search or advanced search.

To search the account's contact details

1. Go to the **Accounts Details** page.
2. On the Contacts tab, select **View All**.
3. Enter a search term in the search bar and press **Enter**.
4. Click the Advanced Search icon ( ) to apply filters to your search results and display the Advanced Search window.
5. Click **Add Criteria**.
6. Select a field to be used in the filter criteria.
7. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
8. Enter the value of the field. The type of value field depends on the field selected.
9. To add another filter, click **Add Criteria** and repeat steps 6, 7, and 8.

   Click the delete icon ( ) next to the search query to remove the search criteria. Click **Remove All** to remove multiple search criteria.
10. Click **Apply**. CLM returns the accounts that match the criteria.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, press Ctrl-Click or Shift-Click to highlight the columns, then click the left and right arrows.
5. To add or remove all columns, click **Insert All** or **Remove All**.
   At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid.

To rearrange columns in the grid

1. Click the **View Setting** icon ( ) to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Managing Account's Contract Details

Contracts are associated with accounts and contacts. You can create contract from an account, search, view, edit, or delete contracts associated with an account.

To create a new contract for an account

1. Click the account name link to open the **Accounts Details** page.
2. Click **Create New Contract**. For more information, see Creating a Contract.

To view the contract details of an account

1. Click the App Launcher icon ( ).
2. Select Accounts from Shared Apps.
3. Click the account name link to open the **Account Details** page.
4. Select the Contracts tab. You can view the list of contracts associated with the account.

   > Select the **View All** button to display more than 50 records.

5. Click the contract name link to open the Contract Details page. You can view the account and primary contact associated with it on the Contracts Details page.

To edit a contract associated with an account

1. Click the account name link to open the **Accounts Details** page.
2. On the **Contracts** tab, click the More icon (⋮) next to the contract you want to edit.
3. Select **Edit.**
4. Update the required details and click **Save**.

To delete a contract associated with an account

1. Click the account name link to open the **Accounts Details** page.
2. On the **Contracts** tab, click the More icon (⋮) next to the contract you want to delete.
3. Select **Delete**.
4. On the "Delete Agreement" popup, click **Confirm**.

To search account's contract details

You can search contract details of an account using the basic search or advanced search.

1. Go to the **Accounts Details** page.
2. On the Contracts tab, select **View All**.
3. Enter a search term in the search bar and press **Enter**.
4. Click the Advanced Search icon ( ) to apply filters to your search results and display the Advanced Search window.
5. Click **Add Criteria**.
6. Select a field to be used in the filter criteria.
7. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
8. Enter the value of the field. The type of value field depends on the field selected.
9. To add another filter, click **Add Criteria** and repeat steps 6, 7, and 8.

   > Click the delete icon ( ) next to the search query to remove the search criteria.
   > Click **Remove All** to remove multiple search criteria.

10. Click **Apply**. CLM returns the accounts that match the criteria.

To configure view setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, press Ctrl-Click or Shift-Click to highlight the columns, then click the left and right arrows.
5. To add or remove all columns, click **Insert All** or **Remove All**.
   At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid.

To rearrange columns in the grid

1. Click the **View Setting** icon ( ) to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Managing Contacts

Contacts contain the contact details of customers or individuals.

This section covers the following topics.

- Contacts Interface

- Creating a Contact
- Deleting Contacts
- Searching Contacts
- Managing Contact's Contract Details

Contacts Interface

You can access your contact after logging in to your Conga platform. This section provides information about contacts interface.

Navigating the Contacts page

When you launch the Contacts page on the UI, you can view the following tabs.

- **My Contacts**: By default, the Contacts page displays the My Contacts tab. On this tab, all the contacts created by you are listed on this page along with their details.
- **Recently viewed**: You can view the list of contacts that you recently viewed.
- **All Contacts**: You can view the list of contacts created by other users only if you have access rights.

There are various functionalities available for you to manage the contacts.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, press Ctrl-Click or Shift-Click to highlight the columns, then click the left and right arrows.
5. To add or remove all columns, click **Insert All** or **Remove All**.
   At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid.

To rearrange columns in the grid

1. Click the **View Setting** icon ( ) to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.
3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, use Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Sorting Contacts

You can sort the contacts by clicking the column names. You can sort the contacts based on the **Name** and **Account Name**. The contacts are sorted by the last modified date in descending order. Every time you click the column name, the sorting switches between ascending and descending order. You can adjust the column width by dragging the columns. Hover near the column boundaries till the two-way arrow appears. Click when the arrow appears and drag left or right to adjust the column width.

Actions available on this page

- Click **New Contact** to create a contact. For more information, see Creating a Contact.
- Click the contact name link to open the **Contact Details** page.
- Click the More icon ( ) next to a contact name to edit an existing contact or delete an existing contact.

Results per page

At the bottom of the page, you can view the total count of contacts available. You can control the number of contacts to be displayed on each page. By default, you can view 10 records on each page.

By default, you can view 10, 20, 30, 50, and 100 contacts per page using the **Rows per page** drop-down list. This feature works in association with the search and filter functions to display search records per page. You can use the Next (>) and Previous (<) buttons to move to the next or the previous pages. You can also jump to a certain page using the page search component.

Creating a Contact

To create a new contact

1. Click the App Launcher icon ( ).
2. Select Contacts from Shared Apps.
3. On the My Contacts tab, click **New Contact**.
4. Enter the following fields in the **Contact Information** section.

   Fields marked with * are mandatory.

Field	Description
Salutation *	Select the salutation or title from the drop-down menu
First Name *	Enter the first name
Last Name *	Enter the last name
Account Name *	Enter the account name
Email *	Enter the email address
Phone	Enter the phone number
Title	Enter the title

5. Enter the following fields in the **Additional Information** section.

Field	Description
Description	Enter the description
Fax	Enter the fax number
Department	Enter the department name the contact person belongs to

Field	Description
Home Phone	Enter the home phone number
Lead Source	Select the source of lead from the drop-down menu

6. Enter the following fields in the **Address Information** section.

Field	Description
Mailing Address	Enter the contact's mailing address
Mailing Street	Enter the contact's mailing street name
Mailing City	Enter the contact's mailing city
Mailing Province/State	Enter the contact's mailing province or state
Mailing Postal Code	Enter the contact's mailing postal code
Mailing Country	Enter the contact's mailing country
Other Address	Enter the contact's alternate address
Other Street	Enter the contact's alternate street name
Other City	Enter the contact's alternate city
Other State	Enter the contact's alternate province or state
Other Postal Code	Enter the contact's alternate postal code
Other Country	Enter the contact's alternate country

7. Click **Save**. A new contact is created.

Deleting Contacts

You can select one or more contacts from a list of contacts and delete them.

To delete a contact

1. Click the App Launcher icon ( ).
2. Select **Contacts** from Shared Apps.
3. On the My Contacts tab, click the contact name link to open the Contact Details page.
4. Click the More icon ( ) in the upper-right corner and select **Delete**.
5. On the Delete Contact window, click **Confirm**.

To delete multiple contacts

1. On the **My Contacts** tab, select the contacts to delete.
2. Click the delete icon ( ) to display the Delete Contact window.
3. Click **Confirm**.

Searching Contacts

Search for Contacts

You can search contacts on the contacts list page using the basic search or advanced search.

To search contacts

1. On the contacts list page, enter a search term in the search bar and press **Enter**.

   > You can search based on the contact name.

2. Click the Advanced Search icon ( ) to apply filters to your search results results and display the Advanced Search window..
3. Click **Add Criteria**.
4. Select a field to be used in the filter criteria.
5. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
6. Enter the value of the field. The type of value field depends on the field selected.
7. To add another filter, click **Add Criteria** and repeat steps 4, 5, and 6.

> Click the delete icon ( ) next to the search query to remove the search criteria.
> Click **Remove All** to remove multiple search criteria.

8. Click **Apply**. CLM returns the contacts that match the criteria.

Managing Contact's Contract Details

To view a contact's contract details

1. Click the App Launcher icon ( ).
2. Select **Contacts** from Shared Apps.
3. Click the contact name link to open the Contact Details page.
4. Select the **Contracts** tab to view the list of contracts associated with the contact.

> Click the **View All** button to view more than 50 records.

5. Click the contract name link to open the Contract Details page.

To edit a contract associated with a contact

1. Go to the Contact Details page.
2. On the Contracts tab, click the More icon ( ) next to the contract you want to edit.
3. Select **Edit.**
4. Update the required details and click **Save**.

To delete a contract associated with a contact

1. Go to the Contact Details page.
2. On the Contracts tab, click the More icon ( ) next to the contract you want to delete.
3. Select **Delete**.
4. On the "Delete Agreement" popup, click **Confirm**.

Search Contact's Contract Details

You can search contract details of an account using the basic search or advanced search.

To search the contact's contract details

1. Go to the Contact Details page.
2. On the Contracts tab, select **View All**.

3. Enter a search term in the search bar and press **Enter**.
4. Click the Advanced Search icon ( ) to apply filters to your search results and raise the Advanced Search window.
5. Click **Add Criteria**.
6. Select a field to be used in the filter criteria.
7. Select an operator from the drop-down. The operator defines the relationship between the field and the value. The list of available operators varies depending on the data type of the chosen field.
8. Enter the value of the field. The type of value field depends on the field selected.
9. To add another filter, click **Add Criteria** and repeat steps 6, 7, and 8.

   > Click the delete icon ( ) next to the search query to remove the search criteria.
   > Click **Remove All** to remove multiple search criteria.

10. Click **Apply**. CLM returns the accounts that match the criteria.

View Setting

View Setting allows you to control which columns are displayed in the grid and rearrange the column order.

To add or remove columns from the grid

1. Click the **View Setting** icon ( ). The **View Settings** window appears.
2. To add a column to the grid, highlight it in the left section and click the plus-sign ( ) icon.
3. To remove a column from the grid, highlight it in the right section and click the minus-sign ( ) icon. You can use the search box available above the section to search for a specific field.
4. To add or remove more than one column, press Ctrl-Click or Shift-Click to highlight the columns, then click the left and right arrows.
5. To add or remove all columns, click **Insert All** or **Remove All**.
   At least one column must be displayed in the grid.
6. Click **Apply** to close the dialog and apply view settings to the grid.

To rearrange columns in the grid

1. Click the **View Setting** icon ( ) to open the View Settings dialog.
2. In the right section, click and drag a column name to move it before or after another column in the list.

3. To move a column up or down one place in the order, hover your cursor over the column name and click the up or down arrow.
4. To change the position of more than one column, Shift-Click to highlight the columns and click the up or down arrow to the right of the section to move the selected columns.
5. Click **Apply** to close the dialog and apply view settings to the grid.

Working with Approvals

Using Approvals, you can set an approval request for a contract. After an approval request is triggered, an approver can approve or reject a request via email or a Conga Platform org. This section describes how to preview an approval process, how to upload documents, how to trigger an approval request for a contract, how to respond to an email notification requesting approval, and how to approve or reject an approval request from the My Approvals page.

Select one of the following topics for more information:

- Preview and Submit
- My Approvals

Preview and Submit

Though Approvals provides clear approval flows for initiated processes, users can also modify and shape the flow in advance by previewing the approval process. With Approvals, Conga Platform users can preview contracts to be approved and see who the contract's specified approvers are. They can then modify their contract to submit it to desired approvers. Users can preview the approval process before submitting the triggering request for approval. With Approvals, a user can:

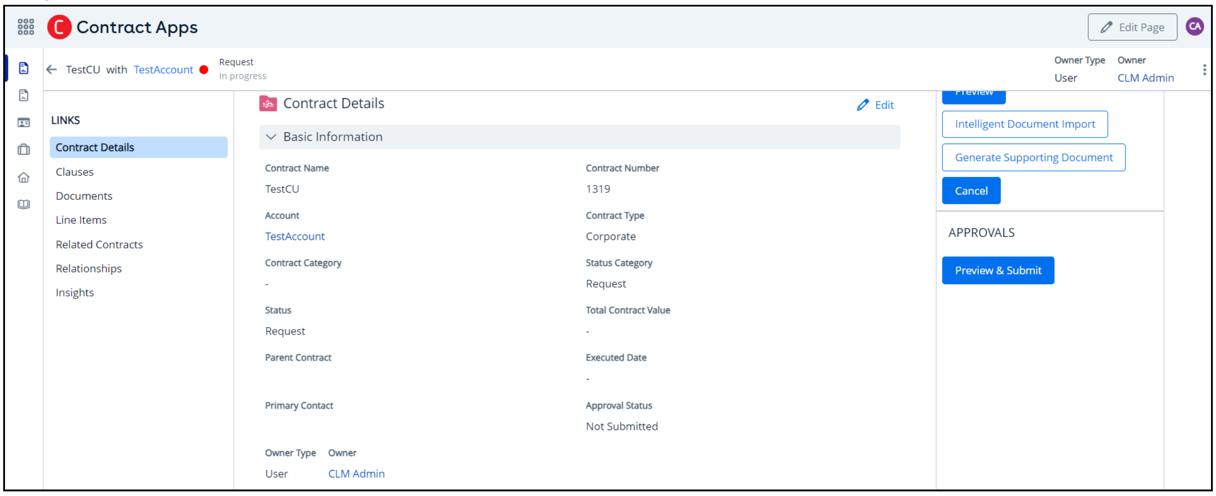
- Preview approvals before submitting the approval request.
- Add attachments to the record submitted for approval.

Accessing the Preview and Submit page

When criteria are satisfied in an approval request, the user can preview the request before submitting it. These criteria may include such parameters as quantity, total contract value, or others. As configured by the administrator, these approvals can be satisfied by one or more approvers in one or more approval steps.

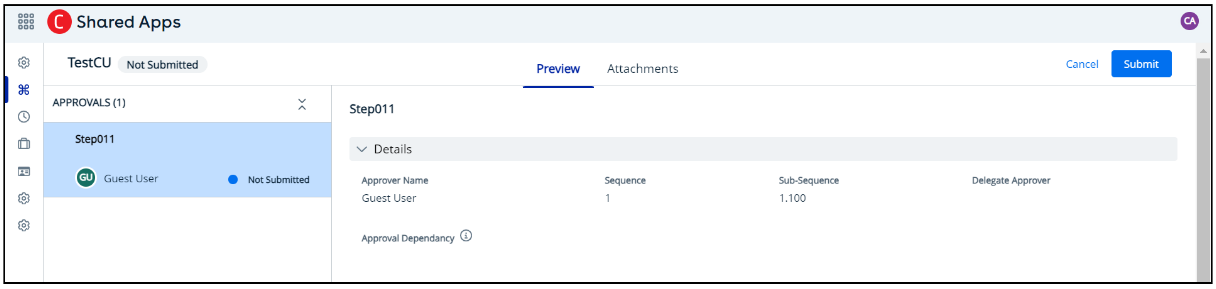
To access Preview and Submit

1. On the **My Contracts** tab, click the contract name link to open the Contract Details page.

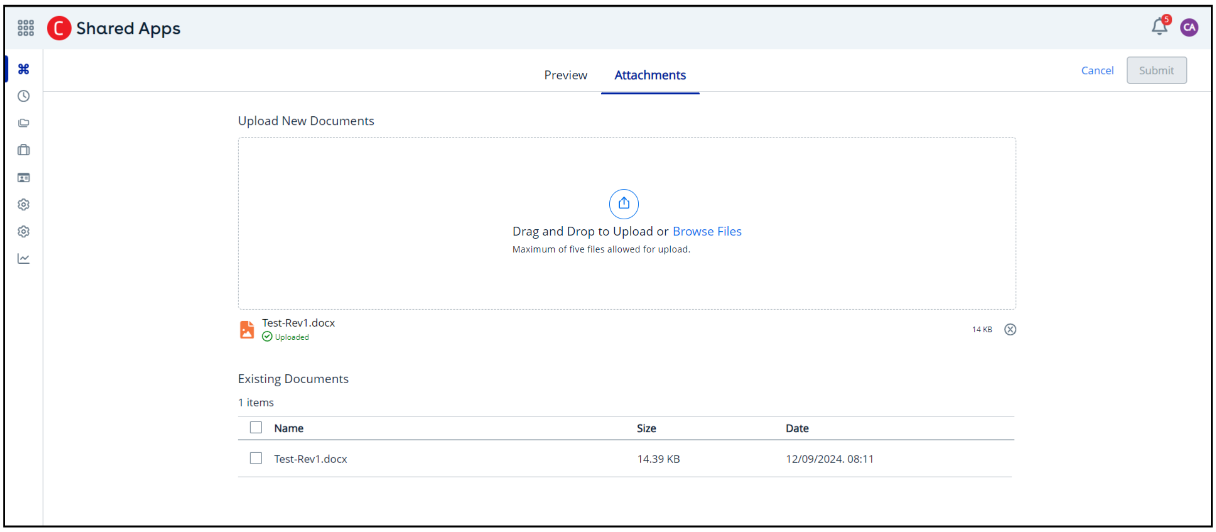


> On the Contract Details page, the **Preview and Submit** button appears for all approval statuses except when the approval status is Pending Approval or Approved.

2. Click the **Preview and Submit** button.
3. On the Preview tab, you can preview the approval process and view the approval flow steps on the left.



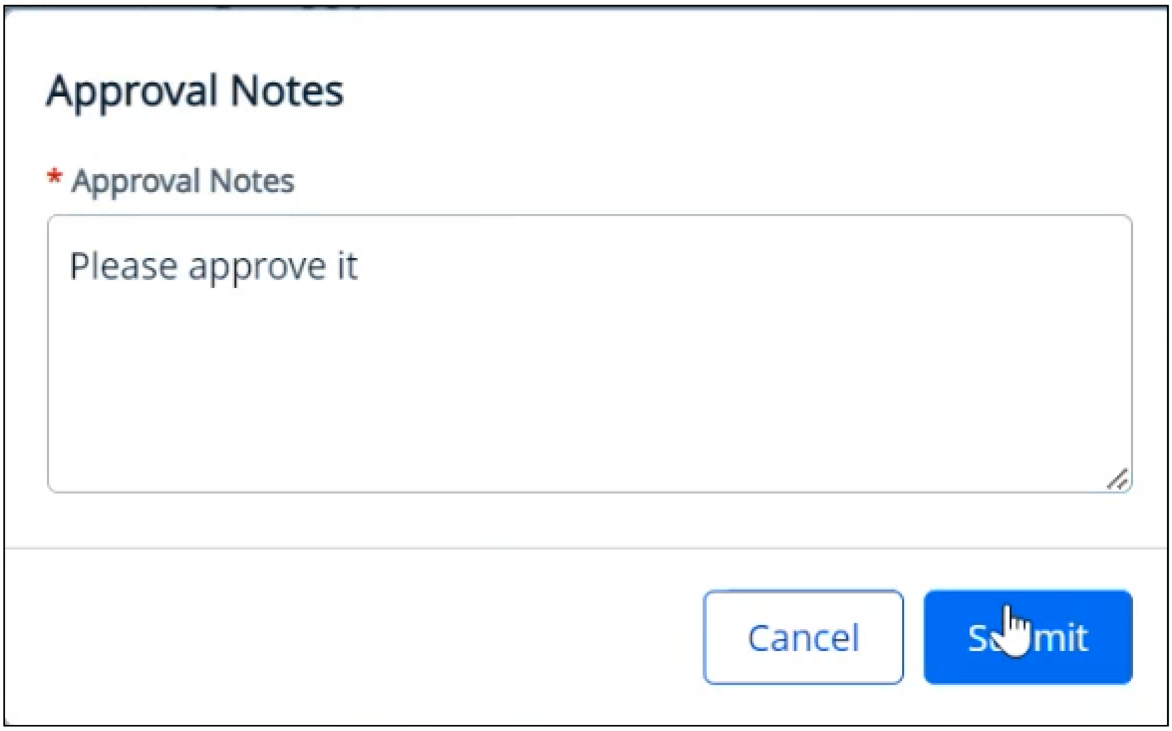
4. Clicking the **Attachments** tab opens an interface that enables you to upload attachments to the approvals flow. This optional step is useful for providing additional information for approvers. Click the Browse Files link to drag and drop files or upload them from your file system. The files are listed in the Existing Documents section. When you select or drop the correct file, it is uploaded.

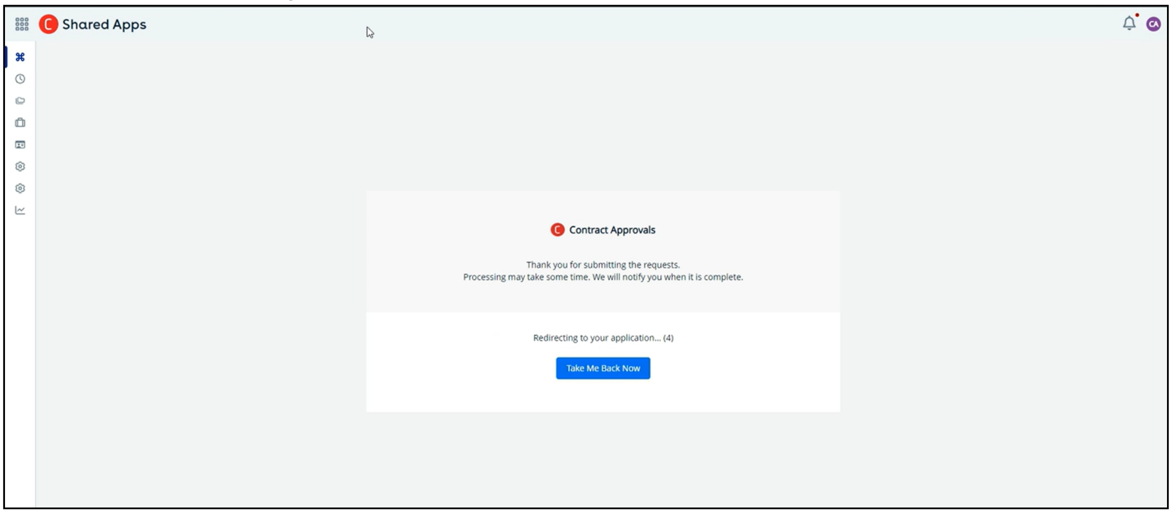


You can upload up to five files with a total size of 15 MB, or a single file of up to 15 MB.

Submitting an approval request

1. When the approval request is satisfactory, click **Submit** to submit the approval request to the approvers named in the previewed flow.
2. You are prompted to enter the description in the **Approval Notes** window.



3. Click **Submit**. The Contract Approvals window is displayed.
   You can wait a few seconds or click **Take Me Back Now** button to redirect to the Contract Details page.
   

   Once the request is processed, it is sent to approvers as shown in the preview. The approval status is now changed to Pending Approval.

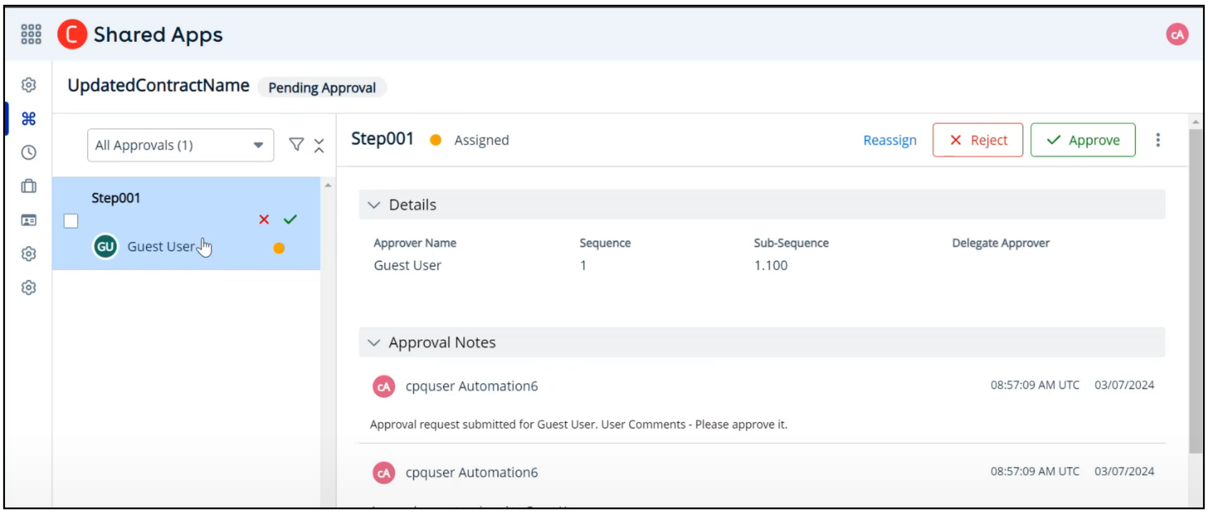
My Approvals

Submitting an approval request ensures that the approver receives an email notification about the approval request or can view this request on the My Approvals page.

To access the My Approvals page

From the Contract Details page, click the **My Approvals** button in the APPROVALS section on the right navigation pane.

> ⓘ On the Contract Details page, the **My Approvals** button appears for all approval statuses except when the approval status is Not Submitted.



From the **My Approvals** page, you can approve, reject, reassign, or recall an approval request.

Actions for Approval Request

After you submit the approval request, the approver can either approve or reject the approval request. There are two methods of approving or rejecting an approval request.

Approving or Rejecting a Request from Email

If an approval request is submitted and you are the assignee for the process, you receive an email notification. You can choose to approve or reject the request from the My Approvals page or respond to the email notification itself.

The assignee can approve or reject an emailed request by using the keywords Approve, Approved, Yes (for approving) or Reject, Rejected, No (for rejecting).

Approving or Rejecting an Approval Request

Access the **My Approvals** page and perform the following actions.

Action	Description
Reassign	Reassign the approval request to another user. For more, see Reassigning a Request.
Reject	Reject the approval request. For more, see Rejecting a Request.
Approve	Approve the approval request. For more, see Approving a Request.

Action	Description
Recall	Cancel the approval request and send an email notification confirming the cancellation. For more, see Recalling a Request.

Reassigning a Request

You can reassign an approval request assigned to you to another user.

To reassign a request

1. Select the approval request and click **Reassign**.
2. In the **Reassign** window,
    - Approver Type: Select the approver type from the drop-down list.
    - Approver Name *: Search and select the approver name.
    - Add your comments.

    > Fields marked with * are mandatory.
3. Click **Save**.
   The approval request assigned to you is now reassigned.

Rejecting a Request

You can reject the approval request assigned to you from the My Approvals page without delay.

To reject a request

1. Select the approval request and click **Reject**.
2. Add your comments in the Reject request window and click **Reject**.
   The approval request assigned to you is now rejected.

Approving a Request

You can approve the approval request assigned to you at once.

To approve a request

1. Select the approval request and click **Approve**.
2. Add your comments in the Approve request window and click **Approve**.
   The approval request assigned to you is now rejected.

Recalling a Request

You can recall the approval request assigned to you from the My Approvals page without delay.

To recall a request

1. Select the approval request and click the More icon (⋮).
2. Select **Recall**.
3. Add your comments in the Recall window and click **Recall.**
   The approval request assigned to you is now recalled.

Reports and Dashboards

Reports & Dashboards provides pre-defined reports and dashboards customized for Conga CLM users. Currently, there are four reports designed for Conga CLM users.

Key features:

- Run a report
- Download a report in CSV, Excel, and PDF format
- Sort data based on column values
- Apply filters based on column values

Reports

Conga CLM contains the following pre-defined reports.

Field	Description
Contract Cycle Time Report	Displays average time taken for contracts to move from one stage to another. Displays the data based on record type and stage
High Risk Contract Report	Lists the contracts with high risk
High Value Contracts Due for Renewal	Lists the contracts with high value due for renewal
Contract Clause Report	Lists the contracts containing clauses
Contacts with Non-standard Legal Language	Lists the contracts containing non-standard legal language

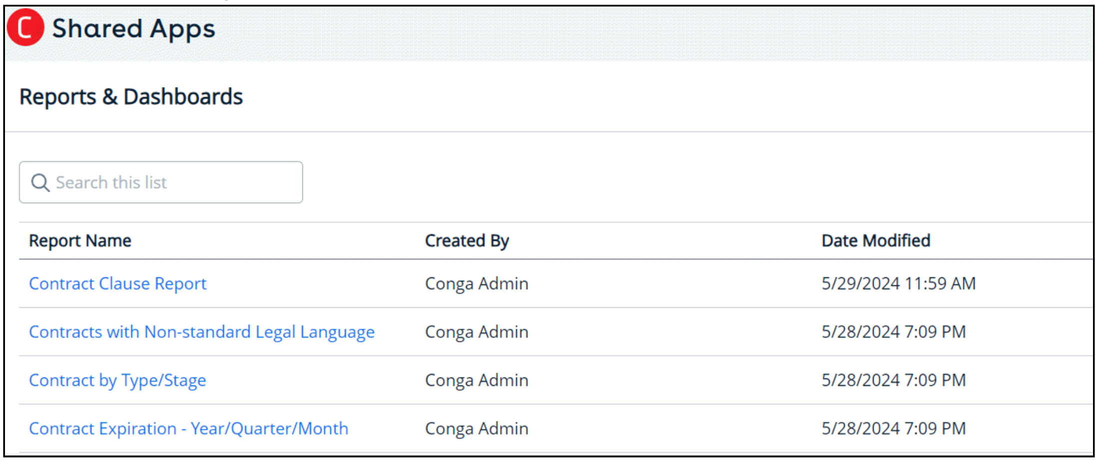
Field	Description
Contract by Type/Stage/Value	Lists the contracts by type or stage along with contract value
Contract Expiration - Year/Quarter/Month	Lists the contracts expiring this year, quarter, or month

Dashboards

Dashboards display key statistics in an understandable format, allowing you to gain insight to fulfill your business needs. The data from reports are displayed on Dashboards in visual formats, for example, charts, tables, or metrics. A report returns a set of records that meets certain criteria and displays it in organized rows and columns. The report data can be filtered, grouped, and displayed graphically as a chart or a table.

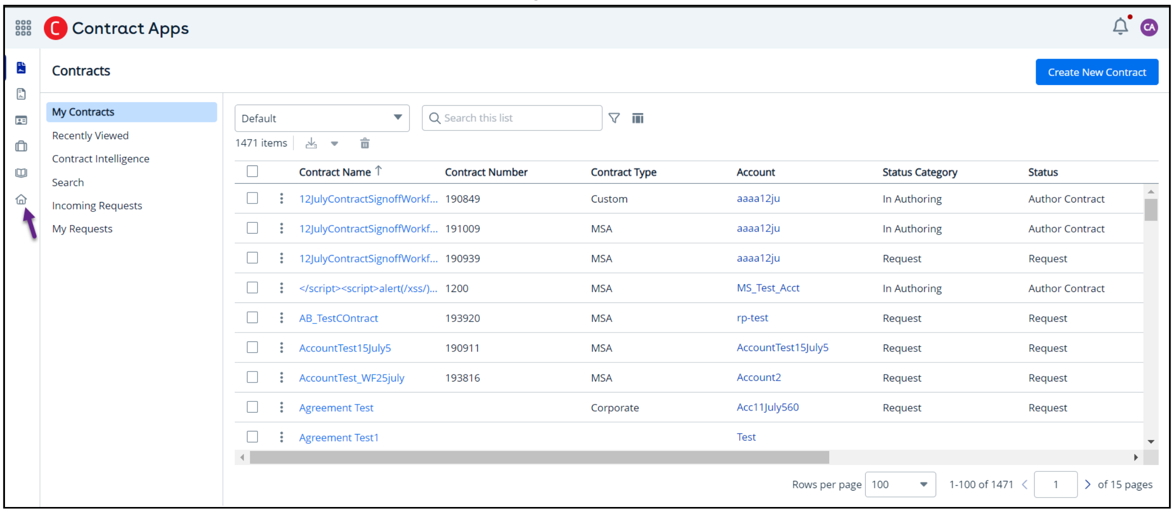
To access Reports and Dashboards

1. Click App Launcher ( ) icon.
2. Click **Reports and Dashboards** from **Shared Apps.** This opens the Reports & Dashboards page with the pre-defined reports.

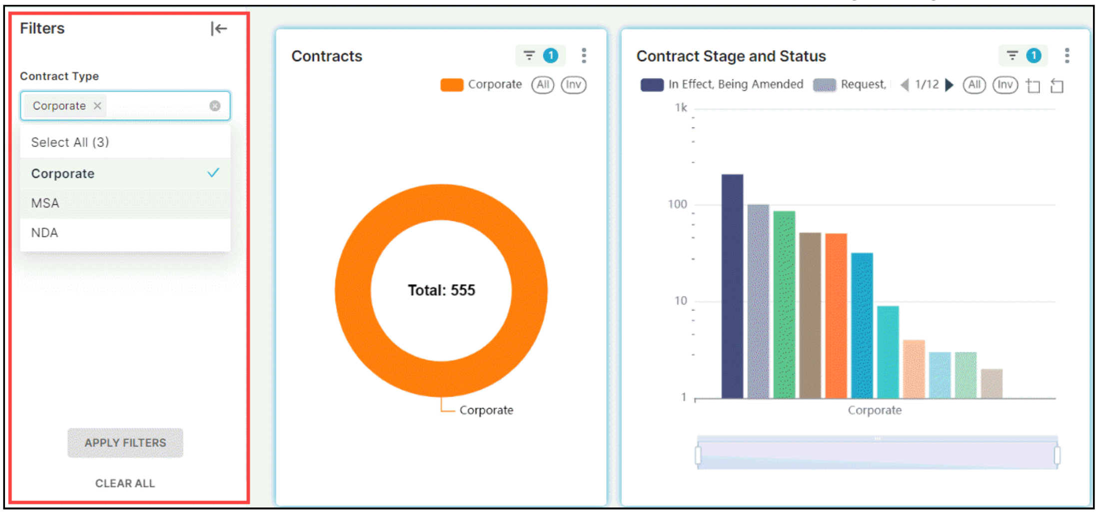


(Or)

Click App Launcher ( ) icon and select Contract Apps > CLM Dashboard ( ) icon to open the Reports & Dashboards page.

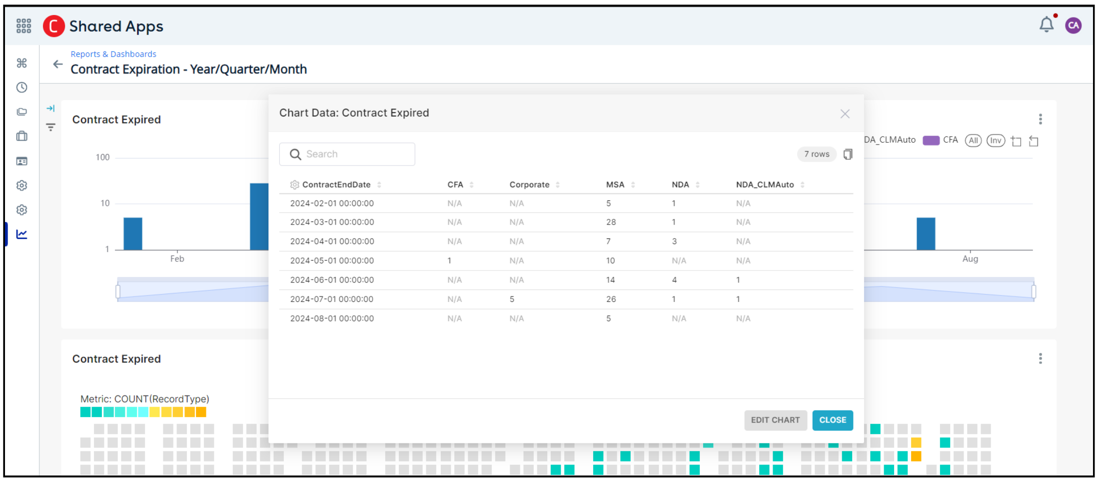


3. Click the report name link to open its dedicated dashboard. On the dashboard, you have the flexibility to:
   - **Apply filters**: Apply filters to display specific fields by refining your data view within the report.
     For example, to filter Corporate records by type or stage, click the Contract by Type/Stage link, select the filter icon ( ) and select Corporate to apply filters. You can view the Corporate records as shown in the following image.

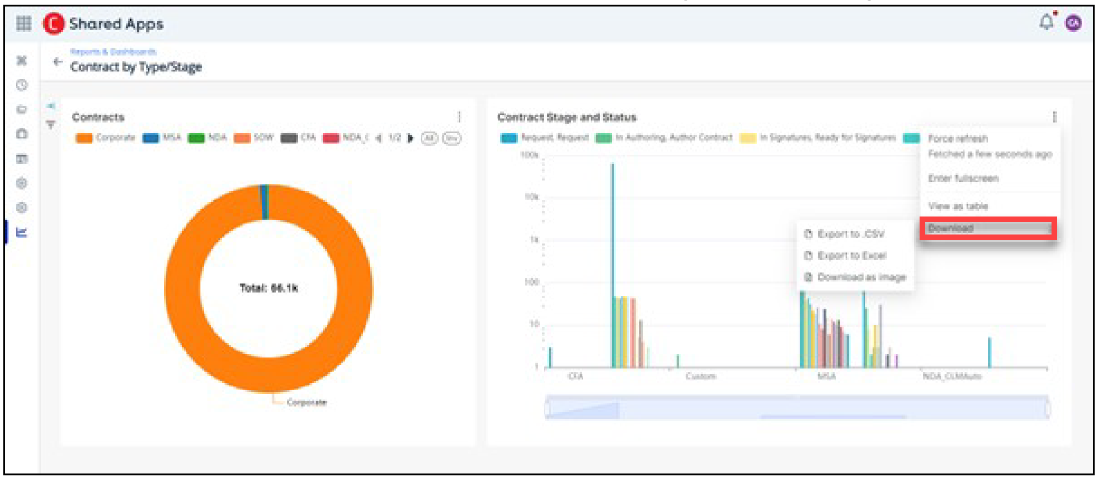


- **Sort data:** Sort any available column and organize the dashboard information.

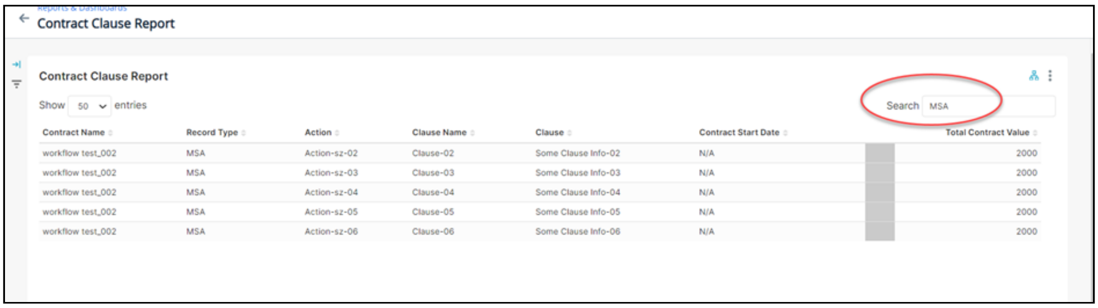
- **Display as table**: View the reports as list view or in table format.



- **Download**: Export the reports in various file formats, such as image, Excel, or CSV (comma-separated values), for further analysis or sharing.

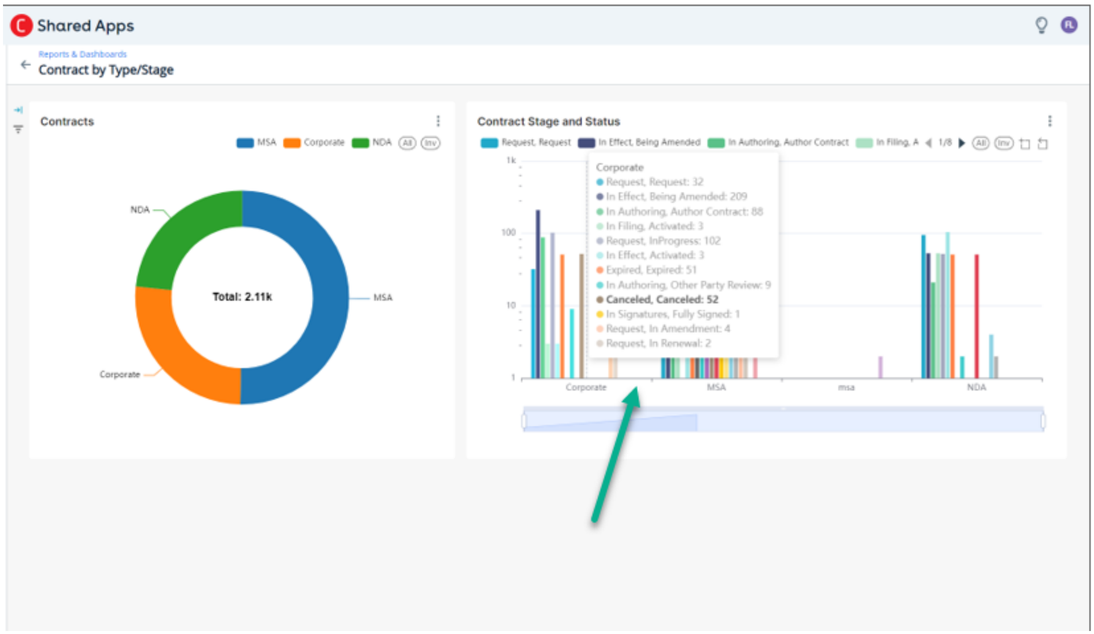


- **Search data**: Search for specific data in a report



- **Display charts**: Different charts (Pie, Bar, Line, Histogram, Funnel, Scatterplot, Summaries) are displayed that graphically show your custom report data.

Hover your mouse over a chart to display the details.



Working with Conga Copilot

Conga Copilot is an AI-powered virtual assistant designed to boost productivity and efficiency when working with a contract document through its entire lifecycle. It leverages machine learning (ML) and natural language processing (NLP) to understand, analyze, and generate content. This is a valuable tool for users working on large documents to ask questions about the content of various documents, including contract documents, supporting documents, global documents, and other documents, and also generate summary for these documents.

Key features

- Provides answers to questions about various types of documents, including contract documents, supporting documents, global documents and other documents.
- Provides the history of questions asked to Copilot on a document.
- Offers a summary of various documents, including contract documents, supporting documents, global documents, and other documents.

Select one of the following topics.

- Asking Questions and Getting Answers
- Use Case for Chat Questions to Conga Copilot
- Generating a Document Summary

Asking Questions and Getting Answers

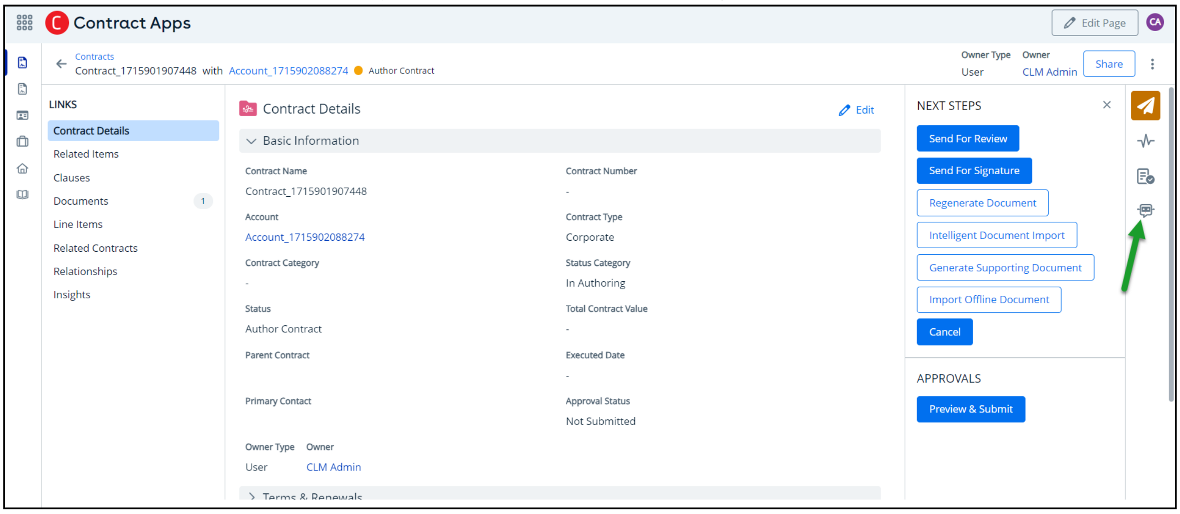
You can ask questions regarding various types of documents including contract documents, supporting documents, global documents, and others, and expect a response from Conga Copilot. You can use the chat window in Conga Copilot to ask questions and get answers.

Prerequisites

- User has access to contract records.
- Contract records have associated contract documents, supporting documents, global documents, and others.
- User has Conga Copilot access.

To ask chat-formatted questions

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Select a contract to display its contract details page.



3. Click the Copilot icon ( ). This raises the Contract Documents window displaying a list of contract documents, supporting documents, global documents, and other documents associated with the selected record.

> ⓘ You can open DOC, DOCX, and PDF file formats.

4. Select a document and click **Start**. This action opens the document window, displaying the document details on the left and the COPILOT window on the right.

Click the search icon ( ) at the top of the document page and enter the keyword in the search box. You can search keywords based on the following options.

- Highlight All: Highlights the search keyword in the contract document.
- Match case: Limits the results to terms with a specific capitalization. When this option is enabled, the search differentiates between uppercase and lowercase letters. For example, searching for “Force” does not return results for “force” or “FORCE".
- Match Diacritics: Text comparisons or searches take into account diacritical marks. When you’re searching for or matching text, Copilot differentiates between characters with and without diacritics. For example, “resumé” and “resume” would be treated as distinct entries
- Whole Words: Searches for specific terms or phrases in a contract document. If you search for a word, Copilot will only return results where that exact word appears.

5. The COPILOT window displays the following:
   - **How does this work?**: Click to navigate to the Conga Customer Community page.
   - **Get Support**: Click to navigate to the Conga Customer Community page and log in with your credentials.
   - **Recent chats**: Click to navigate to the recent chat history window containing your recent interactions with Copilot.
   - **Frequently used prompts**: This contains the most commonly used prompts. You can select any prompt and Copilot responds with a relevant answer.

In the COPILOT window, type your question related to the document in the text box and click the arrow icon ( ) to receive the relevant answer.

> Click the clear icon (+) before the text box to return to home screen. Click the Regenerate icon ( ) to get a different version or format of answer for the same question. This is useful when you do not receive an appropriate answer in first instance.

6. Click the **HISTORY** button to view the chat history for this document based on your interactions with Copilot.

Use Case for Chat Questions to Conga Copilot

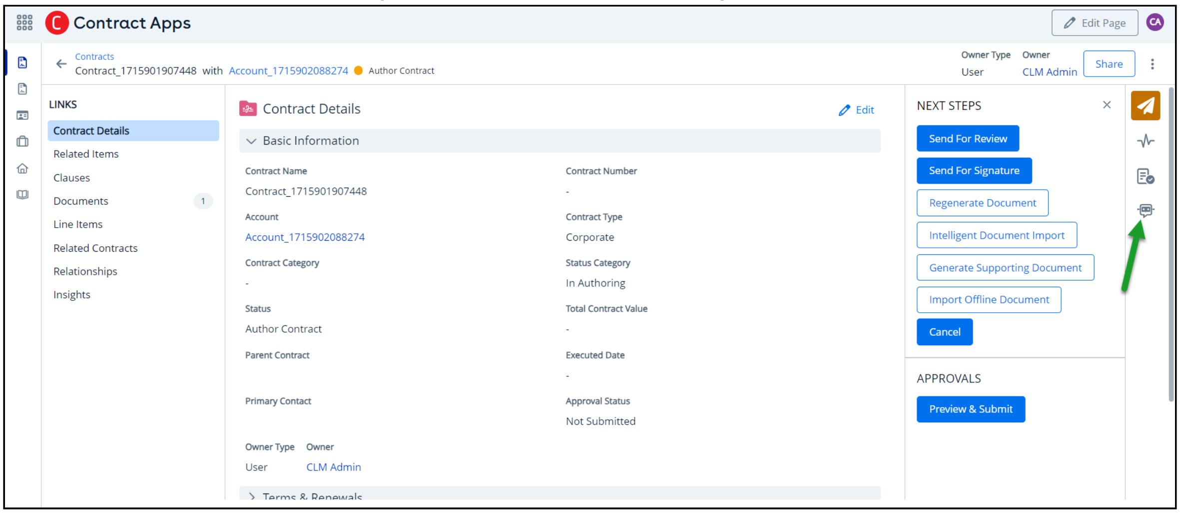
A legal team must find certain information quickly when reviewing a partnership contract containing 200 pages of content. This use case describes how the legal team can use Conga Copilot to get answers quickly.

Prerequisites

- User has access to contract records
- Contract records have associated contract documents, supporting documents, global documents, and others.
- User has Conga Copilot access.

Asking Questions to Copilot

1. Click the App Launcher icon ( ) and select **Contract Apps**.
2. Select a contract to display its contract details page.



3. Click the Copilot icon ( ). This raises the Contract Documents window, displaying a list of contract documents, supporting documents, global documents, and other documents associated with the selected record.

   - You can open DOC, DOCX, and PDF file formats.
   - You can only select one document at a time for summarization.

4. Select a document and click **Start**. This action opens the document window, displaying the document details on the left and the COPILOT window on the right.

> ⓘ Click the search icon (🔍) at the top of the page and enter the keyword in the search box.

5. The COPILOT window displays the following three tiles:
   - **How does this work?**: Click to navigate to the Conga Customer Community page.
   - **Get Support**: Click to navigate to the Conga Customer Community page and log in with your credentials.
   - **Recent chats**: Click to navigate to the recent chat history window containing your recent interactions with Copilot.
   - **Frequently used prompts**: This contains the most commonly used prompts. You can select any prompt and Copilot responds with a relevant answer.

In the COPILOT window, type your question related to the document in the text box and click the arrow icon (➤) to receive the relevant answer.

> Click the clear icon (+) before the text box to return to home screen. Click the Regenerate icon (⇄) to get a different version or format of answer for the same question. This is useful when you do not receive an appropriate answer in first instance.

6. Click the **HISTORY** button to view the chat history for this document based on your interactions with Copilot.

Result

Conga Copilot responds to your questions with relevant answers.

Generating a Document Summary

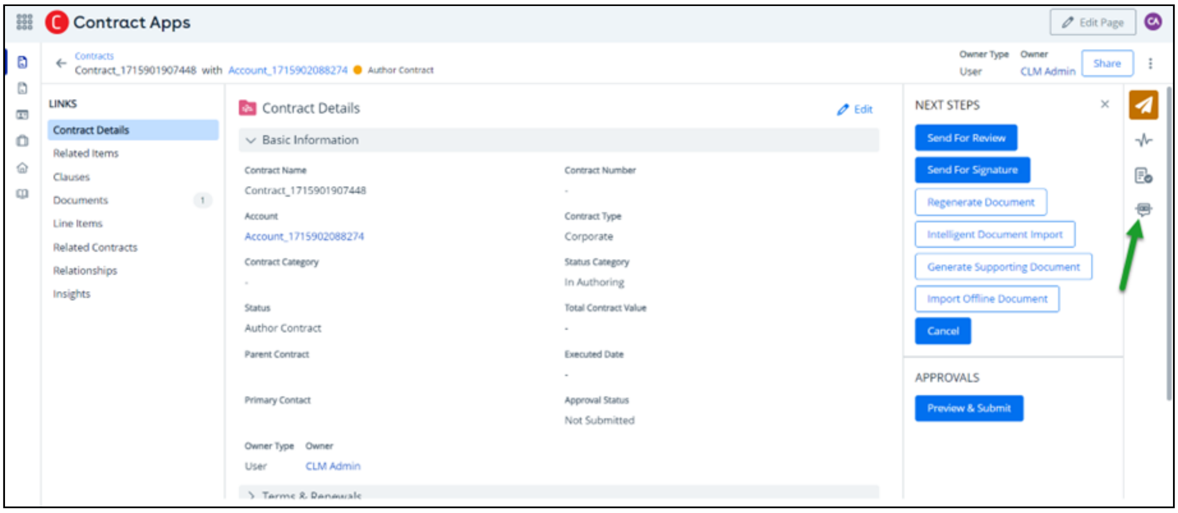
Conga Copilot can summarize various types of documents, including contract documents, supporting documents, global documents and others, making it easier to review lengthy contracts. Users can use the Summary feature in Conga Copilot to generate these summaries efficiently.

Prerequisites

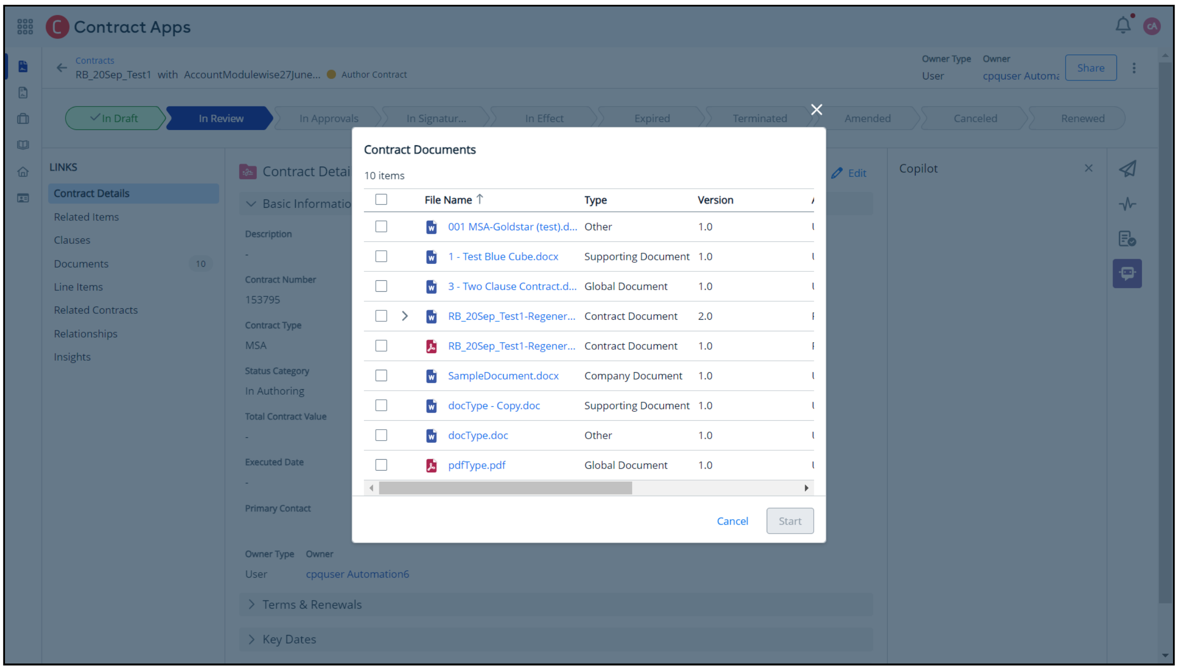
- User has access to contract records.
- Contract records have associated contract documents, supporting documents, global documents and others.
- User has Conga Copilot access.

To generate a document summary

1. Click the App Launcher icon (⠿) and select **Contract Apps**.
2. Select a contract to display the Contract Details page.



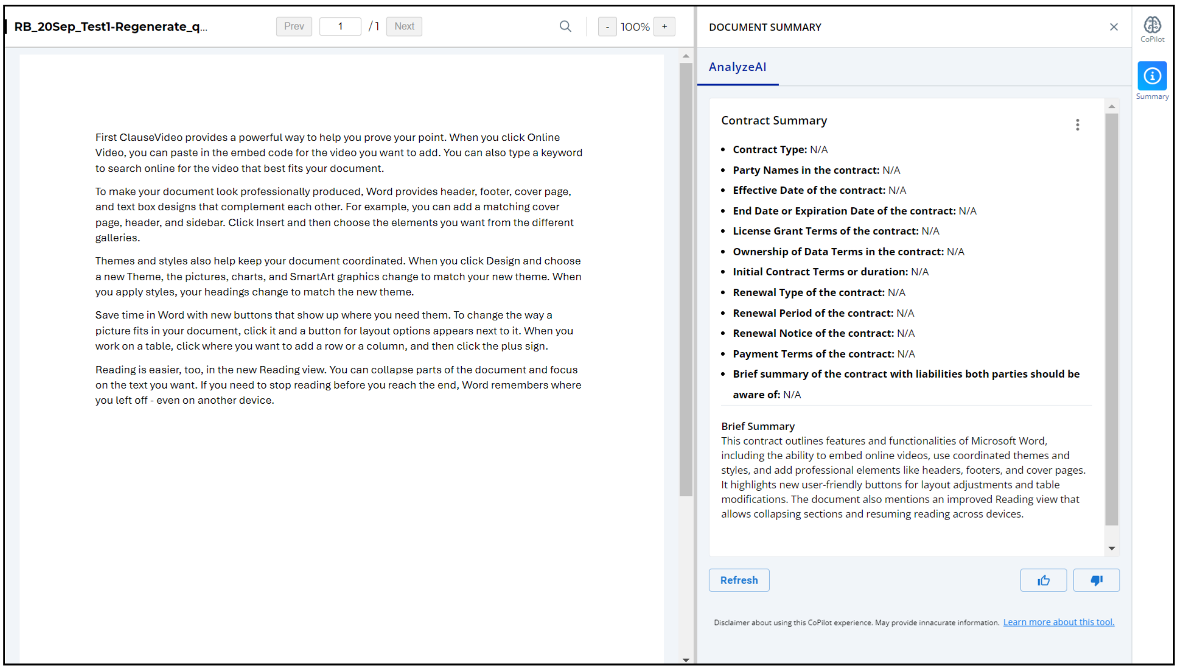
3. Click the Copilot icon ( ). This raises the Contract Documents window, displaying a list of contract documents, supporting documents, global documents, and other documents associated with the selected record.



- You can open DOC, DOCX, and PDF file formats.
- You can only select one document at a time for summarization.

4. Select a document and click **Start**. This action opens the document window, displaying the document details on the left and the COPILOT window on the right.
5. In the COPILOT window, click the Summary icon (Summary). The DOCUMENT SUMMARY window opens showing the summary in two sections: contract summary section that highlights the key points related to the document and brief summary section that

offers a concise overview of the contract.



Availability of Contract Actions

According to a contract action, the following buttons are visible in the NEXT STEPS panel on the Contract Details page.

Contract Action	Buttons Visible
Contract creation, contract amendment, and contract renewal	• Generate Document • Intelligent Document Import • Import Offline Document • Generate Supporting Document • Cancel
Contract document generation and contract document regeneration	• Send for Review • Regenerate Document • Generate Supporting Document • Cancel
Contract expiration and contract termination	None

Contracts Glossary

This section lists the terms and their definitions for the CLM application.

Term	Definition
Contract	A set of terms and conditions agreed upon by two or more parties. A contract between two or more entities, with specific terms.
Contract document	A document generated by merging information stored in a record with an existing template.
Amend	An action that enables you to modify the terms of an active Contract. It creates a new version of the Contract record with an "amended" relationship to the original Contract. The new, amended record shares the same base Contract number as the original, with the decimal point incremented by one.
Clause	A modular block of text that is used frequently across multiple templates.
Contract Management	The process of systematically and efficiently managing contract creation, execution, and analysis.
Document	A dynamically generated output through merging information stored in a contract record with the static text of an existing template. Output documents can be sent for review, approval, or signature.
Expire	An action that marks the Contract as Expired after the Contract term ends.
Offline Contract/Document	A third-party paper that you want to use as a basis for your contract.

Term	Definition
Record	A collection of fields with information about a specific item of a specific type (represented by an object), such as a Contact, an Account, or an Opportunity.
Contract Type	A contract type defines which page layouts users see when they view Contract records, based on their user profile. For example, you can create contract types to differentiate your regular sales deals from your professional services engagements, offering different picklist values for each.
Retention Policy	A rule that determines the length of time a record must be stored.
Template	A blueprint to generate a variety of document types when merged with data from Contracts or quotes.

CLM for REST API Developers

This section describes the REST APIs provided by Conga CLM.

Topic	Description
What's Covered	This section walks an API user through the list of REST APIs provided by Conga.
Primary Audience	API developers.
IT Environment	Refer to the latest Conga CLM Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in CLM Documentation topic.

Before using Conga CLM, you must be familiar with the following:

- Basic knowledge of REST APIs and Conga Platform
- Conga terms and definitions

This section describes the following topics:

- Bulk Import APIs
- Contract APIs
- Contract Request APIs
- Copilot APIs

Bulk Import APIs

Navigate to the Conga Developer Portal to review interactive API documentation for CLM.

Contract APIs

Navigate to the Conga Developer Portal to review interactive API documentation for CLM.

Contract Request APIs

Navigate to the Conga Developer Portal to review interactive API documentation for CLM.

Copilot APIs

Navigate to the Conga Developer Portal to review interactive API documentation for CLM.

CLM Features by Release

Review the latest CLM Features by Release document.

- Features by Release

Features by Release

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