

The background of the slide is a grayscale abstract image featuring horizontal motion blur streaks. Overlaid on this is a white geometric network consisting of thin lines and small hexagonal nodes, resembling a digital or data network.

APTTUS

Basic Administration Contract Lifecycle Management

Housekeeping



Explanation – Demonstration – Participation



4 Hour session with breaks



Access to Class materials through Post-Session Survey

Agenda

- Contract Lifecycle Management Overview
 - Background
 - Apttus and Salesforce
 - Object Model
 - Terminology
- Agreement Administration
 - Record Types, Fields, Action Section
- Process Maintenance
 - Document Output Format, Protection, Template Selection
 - Standard Flow vs Non-Standard Flow
- Agreement Creation
 - Wizard



Contract Lifecycle Management Overview

APTUS

Apttus Intelligent Contract Lifecycle Management

The World's Leading Enterprise CLM Software



Apttus Quote-to-Cash

Built on the Apttus Intelligent Cloud™

OPPORTUNITY

QUOTE

CONTRACT

REVENUE

ERP

CONFIGURE
PRICE
QUOTE

CONTRACT
MANAGEMENT

BILLING
MANAGEMENT &
REVENUE
RECOGNITION

DEAL MANAGEMENT

ORDER MANAGEMENT

OMNI-CHANNEL E-COMMERCE

PROMOTIONS

INCENTIVE COMPENSATION

REBATES

X-AUTHOR



MAX

MACHINE LEARNING

Hi, I'm Max...
How can I
help you?



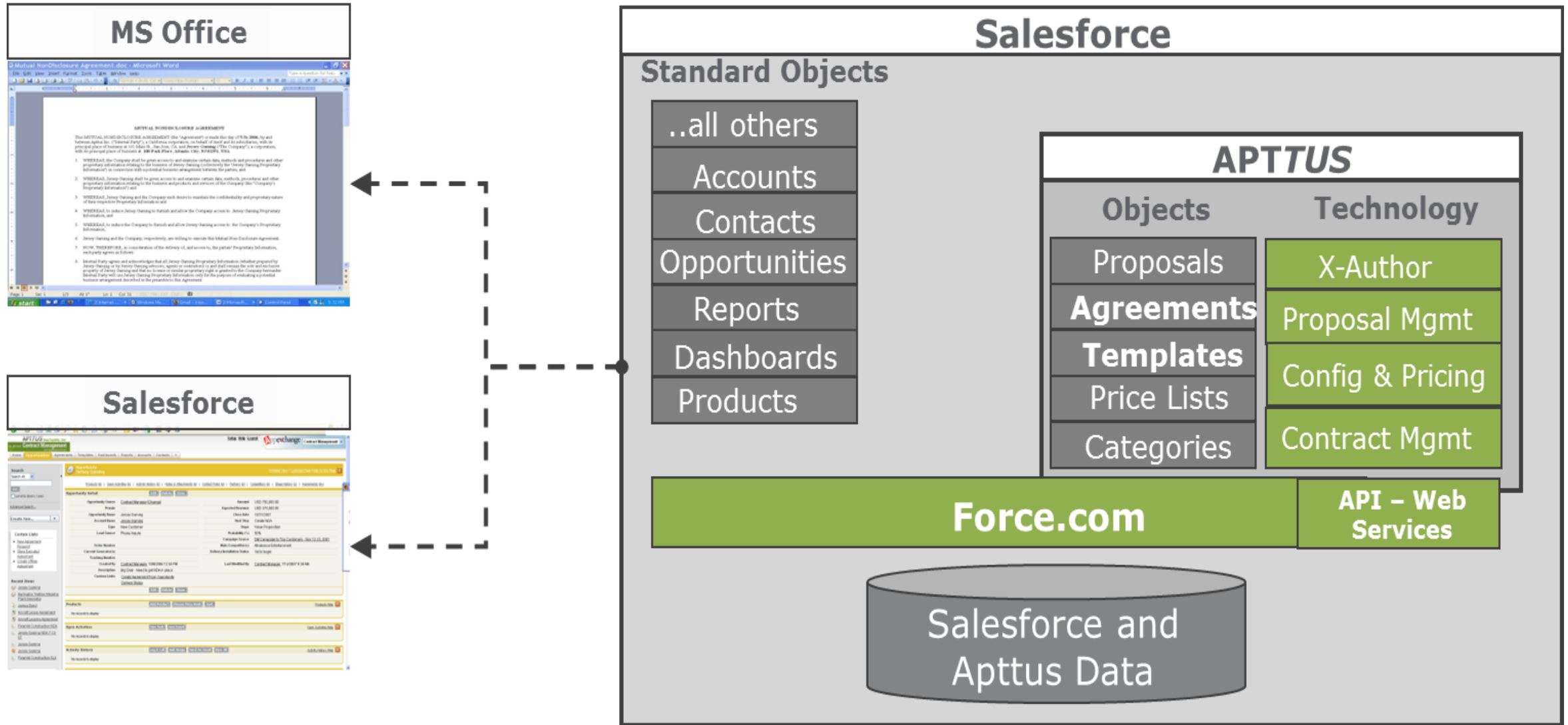
ARTIFICIAL INTELLIGENCE

BEHAVIOR

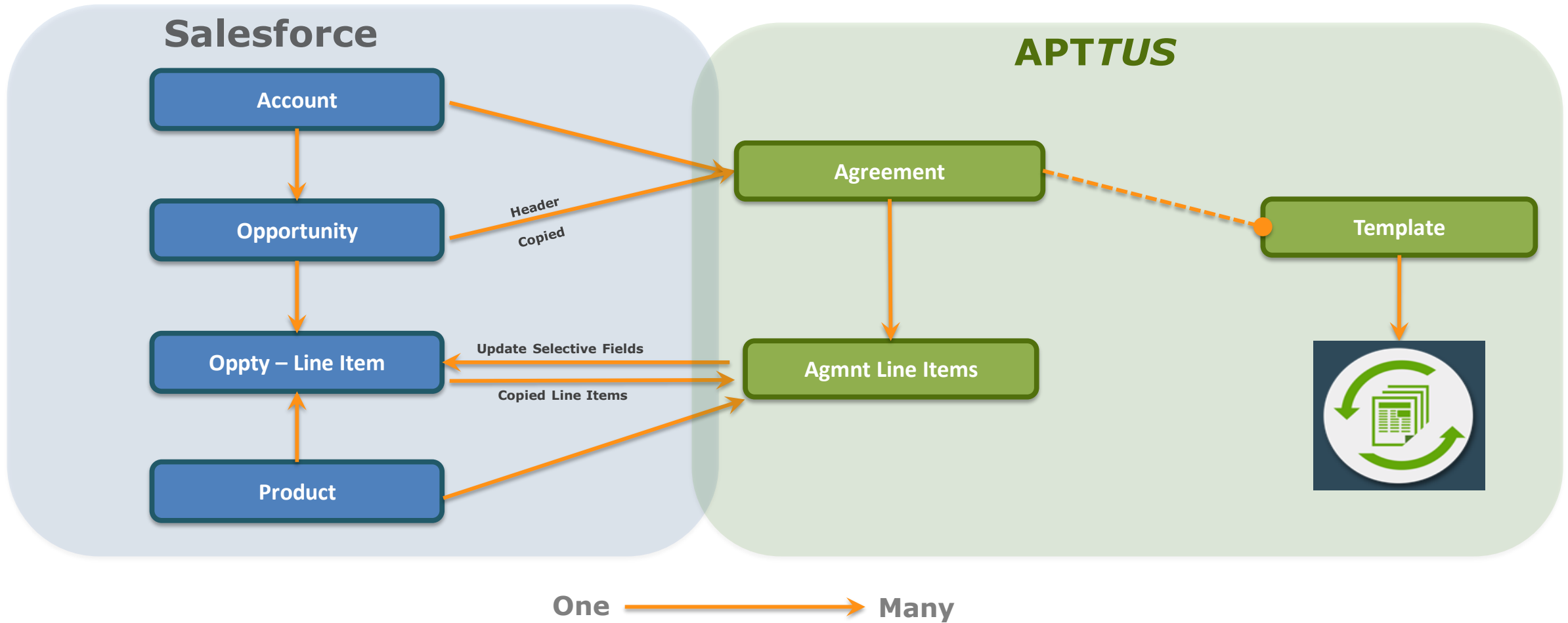
PROCESS

APTUS

Apttus Architecture



Object Relationships



Terminology



Object: provides structure to store data within the Salesforce environment

Record: an instance of an object

Agreement: set of agreed upon terms and conditions between two or more parties

Template: contain static language/text and references to dynamic field data

Documents: output generated by merging structured data (record/field values) and unstructured data (template language)

Contract Lifecycle Management Process

Pre-Contract Request

Author and Negotiate

*Store
and
Comply*

↓ Template

Opportunity

Create
Agreement

Generate
Document

Send for
Review

Complete
Negotiations

Activate
Agreement

Repository

Initiate, Request, Generate

Negotiate, Redline, Finalize, Activate

*Repository, Search,
Report, Obligations
and Compliance*

Demo



Agreement Administration

APTUS

Agreement Record Types

1

- Gather requirements

2

- Create custom fields

3

- Create new record type

4

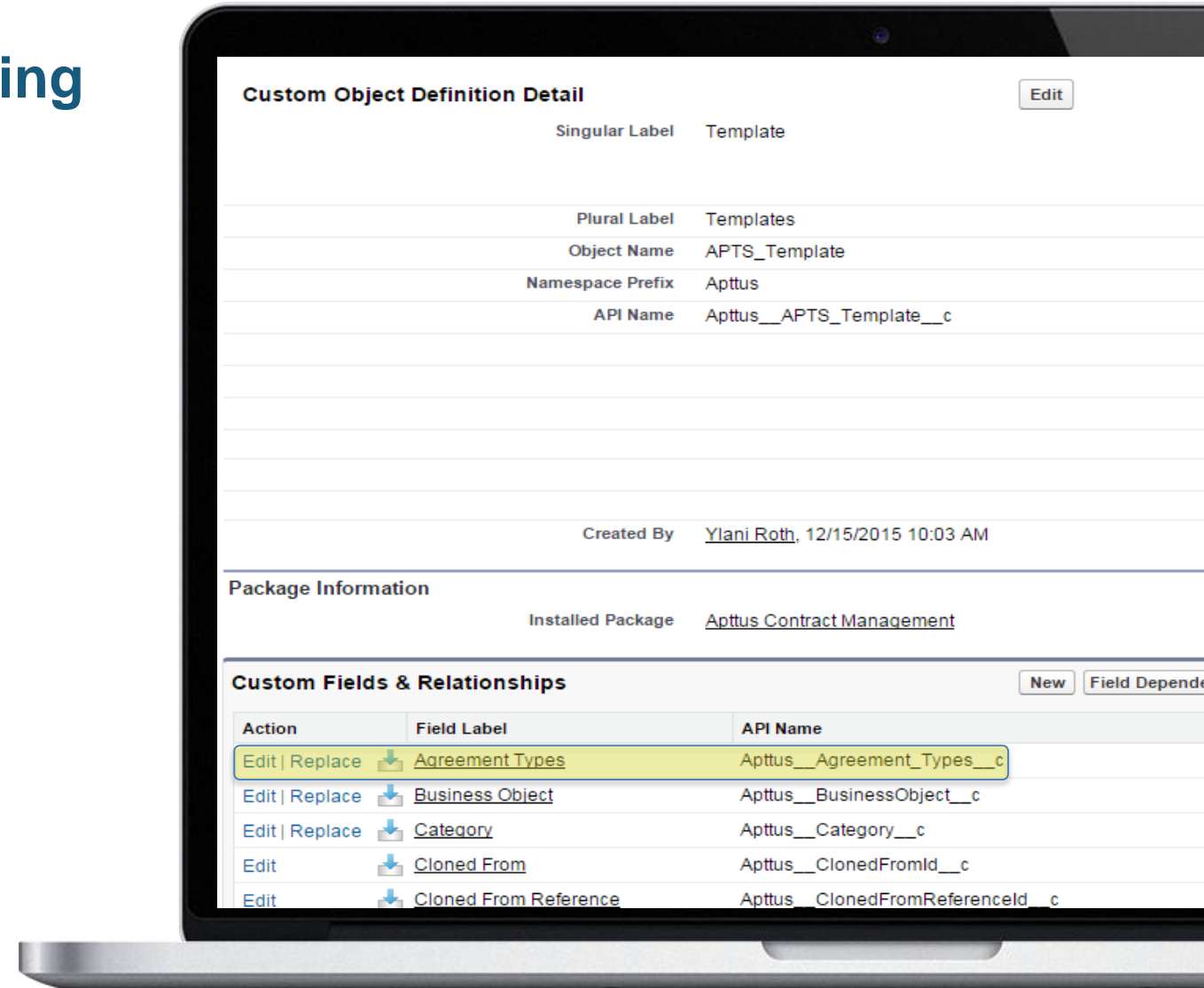
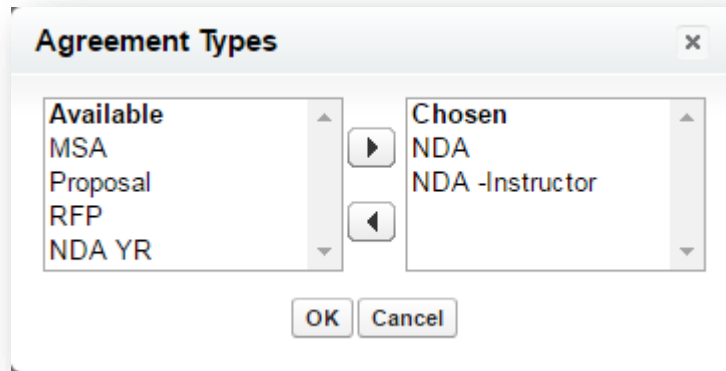
- Define page layout

5

- Enable record type for template authoring

Enable New Record Type for Authoring

- Allows record type to pull template for generation
- Must be done in order to generate an agreement document



Action Buttons



Custom formula fields

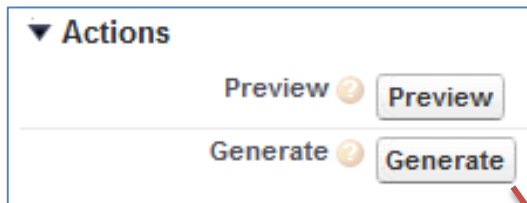
Appears and updates conditionally based on the current Agreement header

Prompts the user for the next action in defined process

Guides user through process

Action Button—Composition

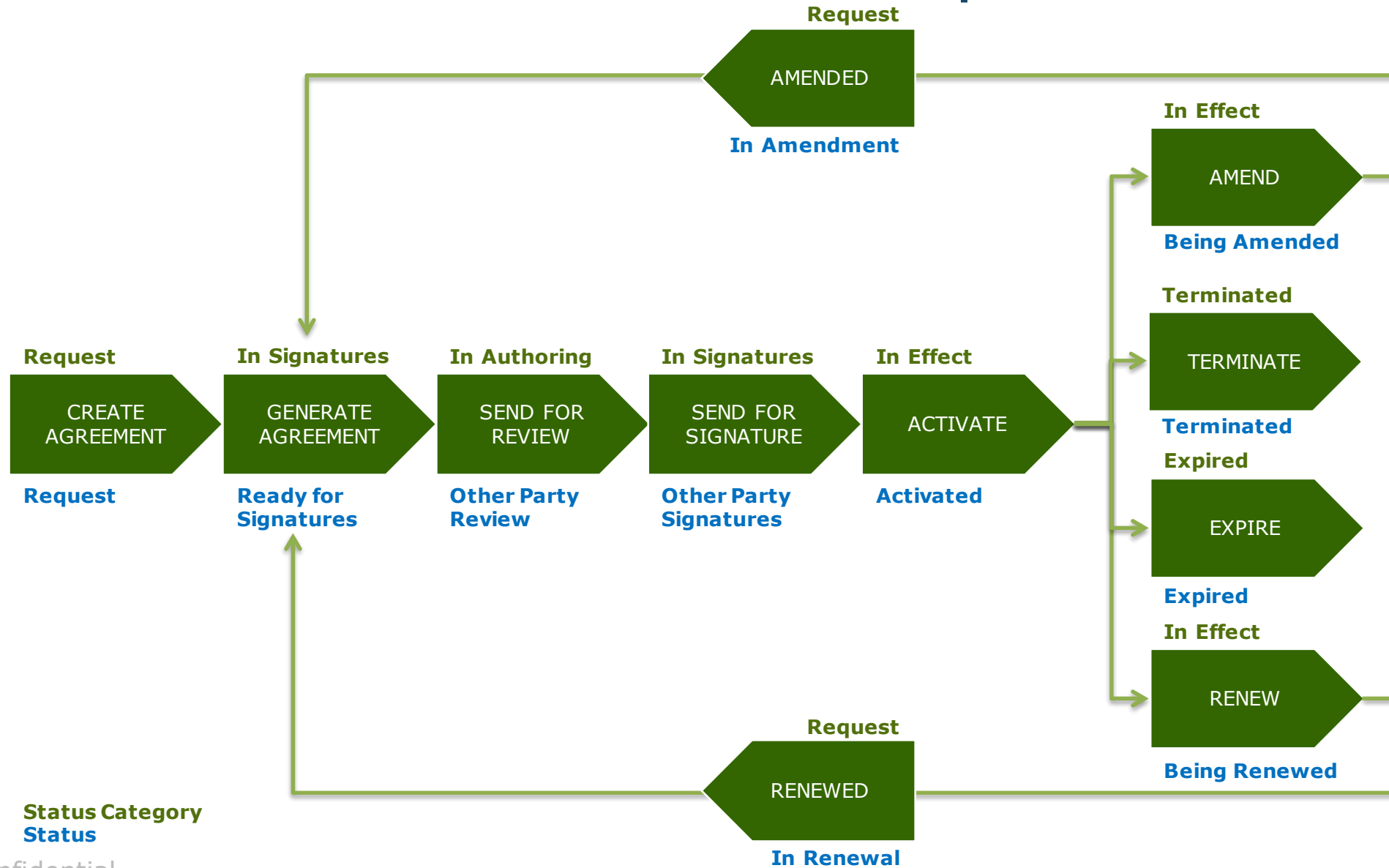
- Formula Field, Data Type = text, on page layout
- Contains logic that dictates:
 - When to display the button
 - How the button looks
 - What happens when the button is selected



Formula Options

Data Type	Formula
	IF (ISPICKVAL(Apttus__Status_Category__c, "Request"), HYPERLINK("/apex/GenerateAgreementDocument?id="&Id & "&action=Generate_Agreement&templateType=Agreement&TemplateName="& \$RecordType.DeveloperName , IMAGE("/resource/Apttus__Button_Generate", "Generate"), "_self"), NULL)

Contract Status in Apttus



Process Maintenance

APTUS

Document Output Format

What?

- DOC
- DOCX
- RTF
- PDF

How?

- Profile
- Record Type

Change?

- Defaults
- Overrides

Agreement Protection

1

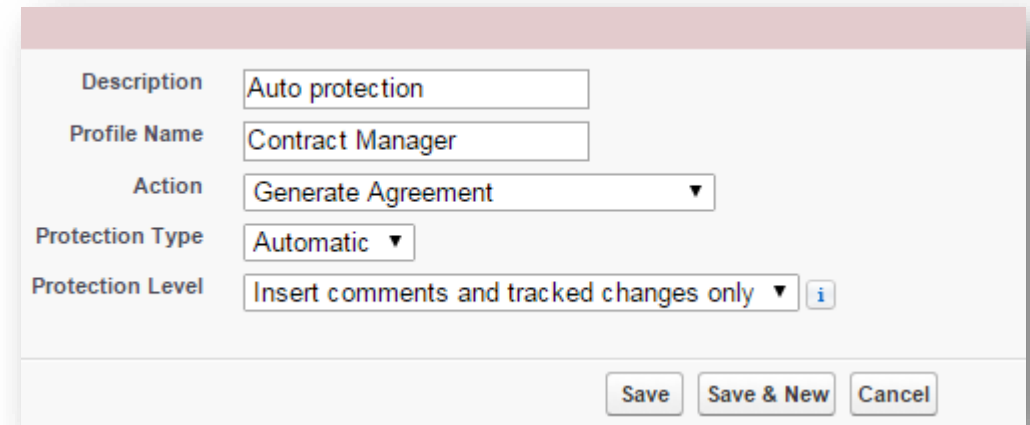
- Profile Name
 - Must be exact match

2

- Action
 - One action per rule

3

- Protection Type/Level



A screenshot of a web-based configuration form for 'Agreement Protection'. The form has a light gray background with a pink header bar. It contains several input fields and dropdown menus. The fields are: 'Description' (text input with 'Auto protection'), 'Profile Name' (text input with 'Contract Manager'), 'Action' (dropdown menu with 'Generate Agreement'), 'Protection Type' (dropdown menu with 'Automatic'), and 'Protection Level' (dropdown menu with 'Insert comments and tracked changes only'). There is an information icon (i) next to the 'Protection Level' dropdown. At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Description	Auto protection
Profile Name	Contract Manager
Action	Generate Agreement ▼
Protection Type	Automatic ▼
Protection Level	Insert comments and tracked changes only ▼ ⓘ

Save Save & New Cancel

Query Template Filters

- Narrows the list of Templates available for generation
- **If** / Agreement field value matches Template field value
- **Then** / present corresponding template for generation

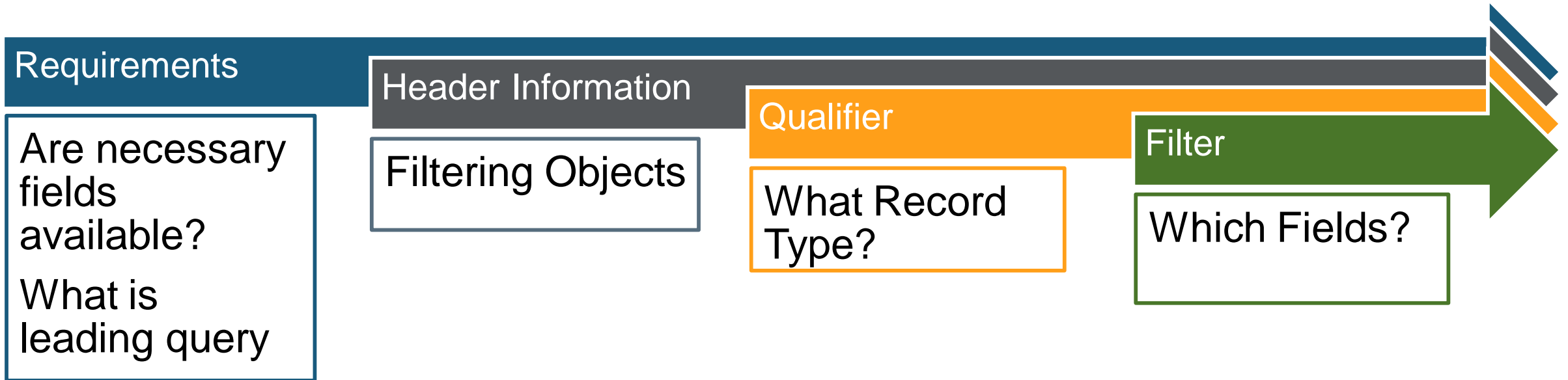
The screenshot illustrates a query filter rule between an Agreement and a Template. On the left, the 'Agreement Detail' form shows the 'Language' field set to 'English'. On the right, the 'Template Detail' form for 'NDA' also shows the 'Language' field set to 'English'. A large double-headed arrow with an equals sign connects the two 'Language' fields, indicating a match. The 'Agreement Detail' form includes a 'Generate' button and a 'Progress Bar' for 'Contract Management' with 'Request' and 'Authoring' stages. The 'Template Detail' form includes 'Edit', 'Delete', and 'Clone' buttons.

Agreement Detail	
Agreement Number	00001588.0
Agreement Name	NDA CERT
Account	ABC Corporation
Parent Agreement	
Agreement Start Date	6/23/2014
Agreement End Date	6/22/2015
Language	English
Generate	

Template Detail	
Name	NDA
Description	Non-Disclosure Agreement
Agreement Types	NDA
Type	Agreement
Language	English
Category	Company
Subcategory	Default
IsActive	<input checked="" type="checkbox"/>

Query Template

- If the Agreement Region is EMEA, present only EMEA templates



Query Template

- If the NDA agreement Language is English and Region is APAC, present only English APAC templates

Qualifiers New Query Template Qualifier Qualifiers Help ?

Action	Qualifier Name	Sequence	Object	SObject Type	Field	Comparison Operator	Value	Relation Field
Edit Del	QTQ-0000001	1	Agreement	Apttus__APTS_Agreement__c	RecordType.Name	equal to	NDA	

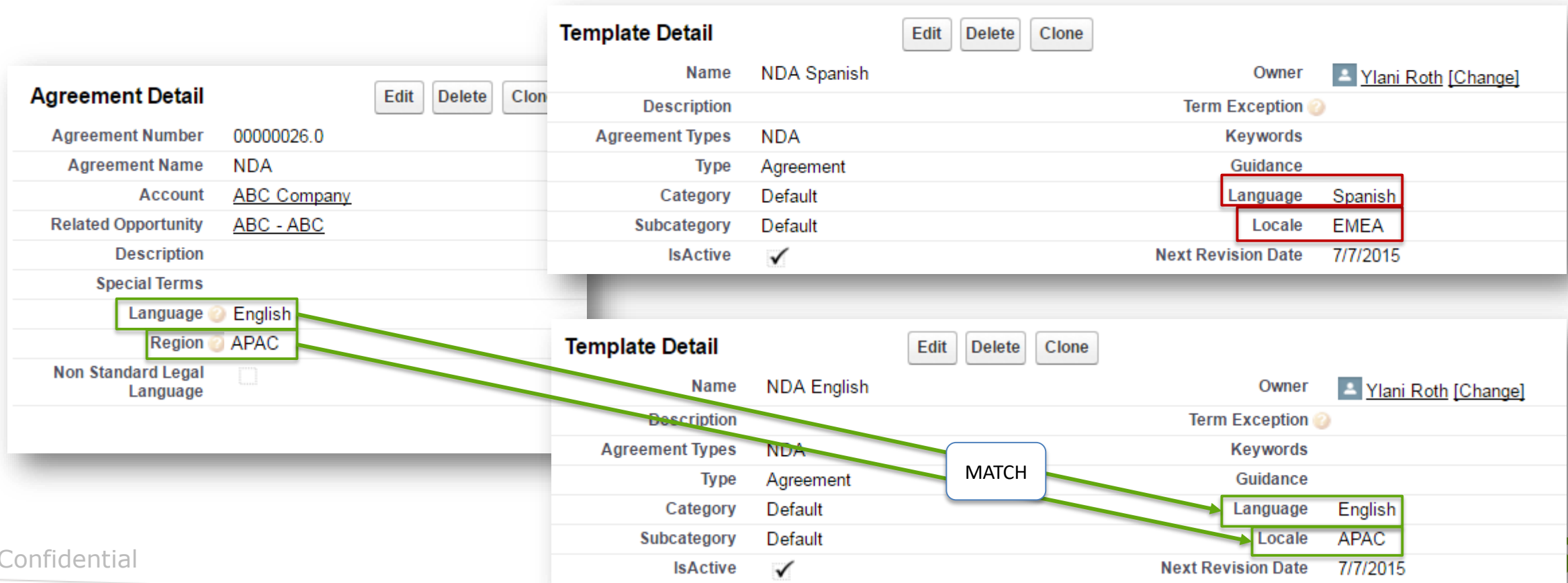
Filters New Query Template Filter Filters Help ?

Action	Filter Name	Sequence	Field	Comparison Operator	Value	Boolean Operator
Edit Del	QTF-0000001	1	Apttus__Language__c	equal to	Apttus__APTS_Agreement__c.Language__c	AND
Edit Del	QTF-0000002	1	Apttus__Locale__c	equal to	Apttus__APTS_Agreement__c.Region__c	AND

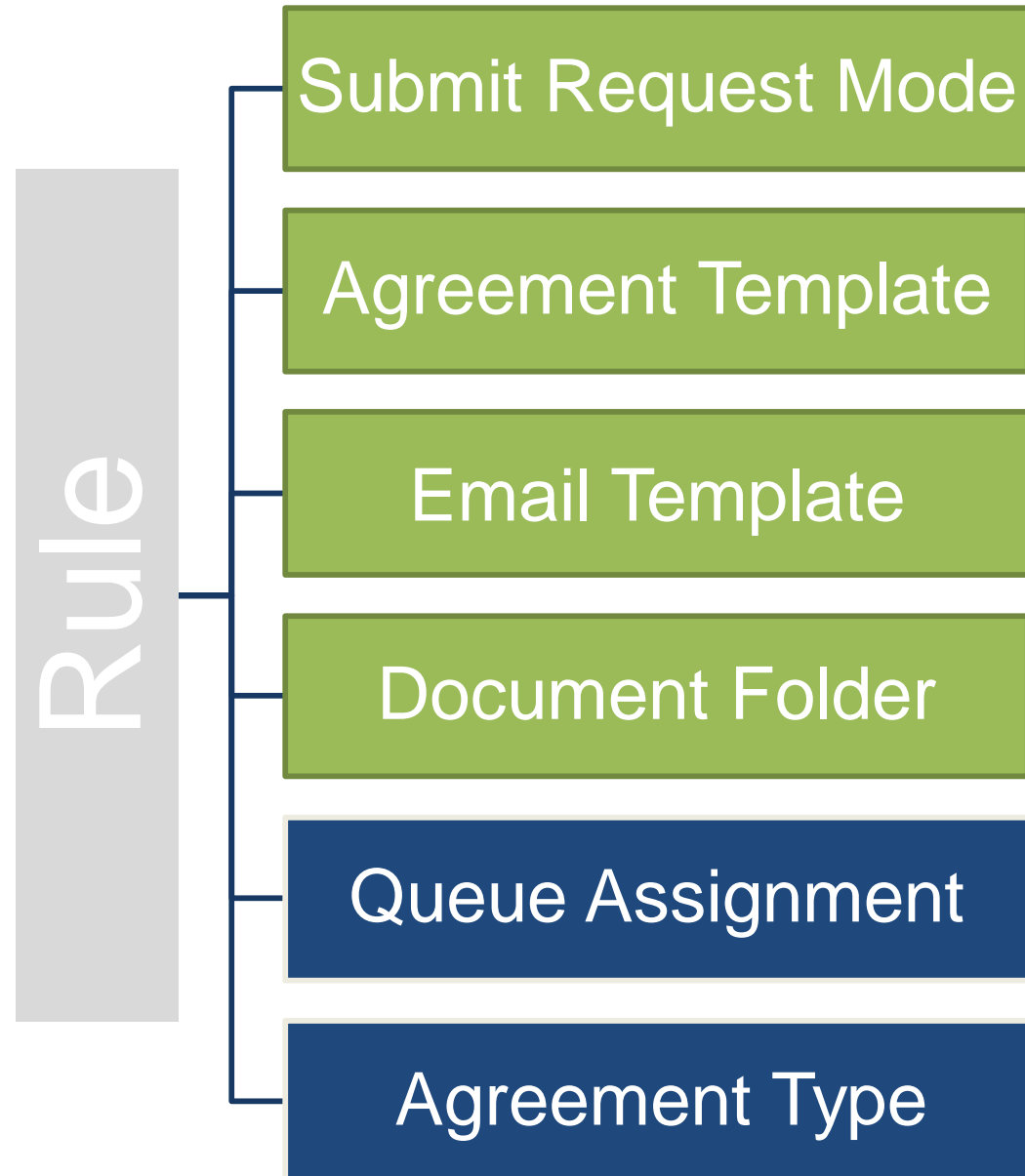
Matching
Values, NOT
Fields

Query Template Filters

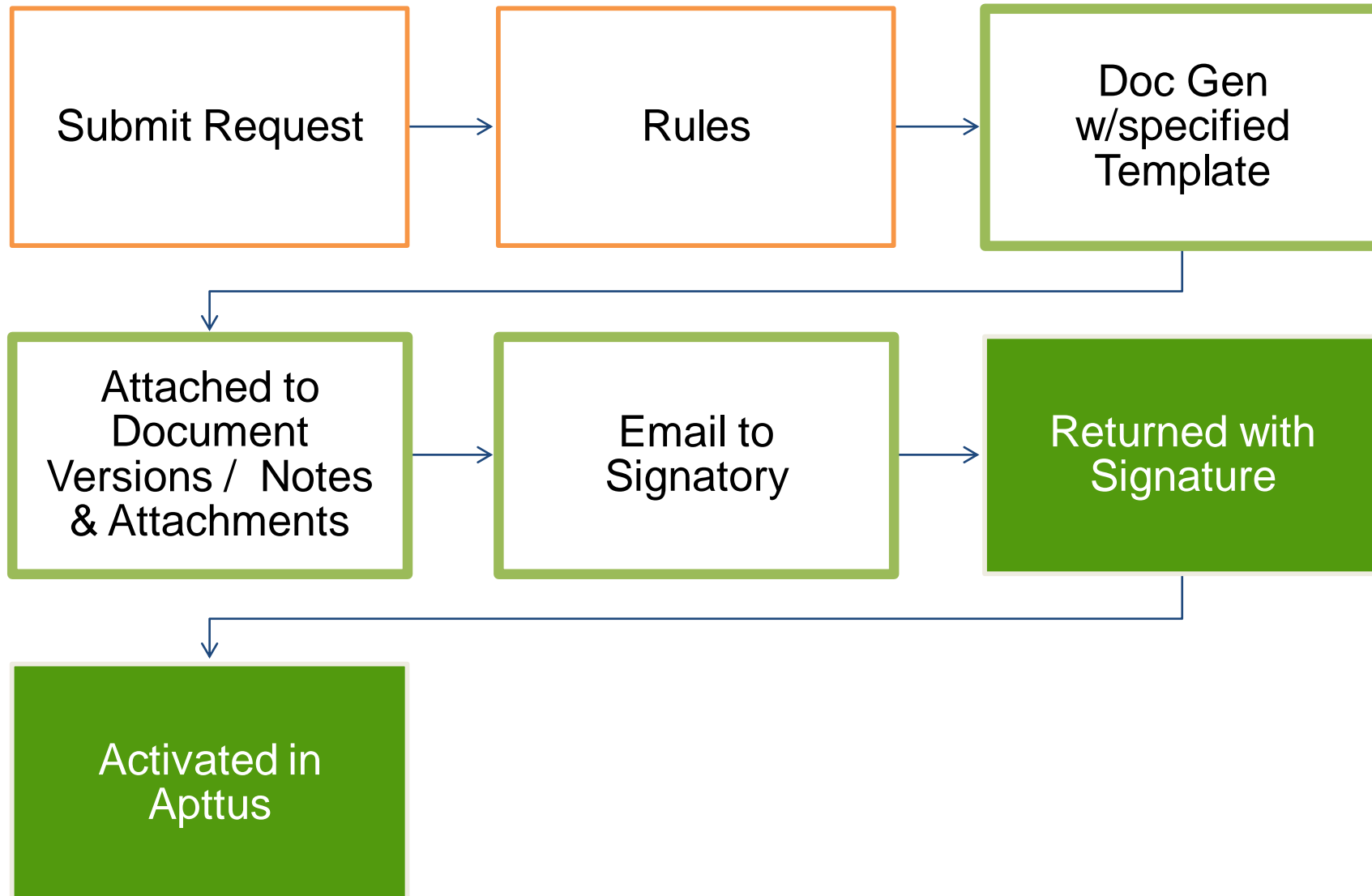
- If the NDA agreement Language is English and Region is APAC, present only English APAC templates



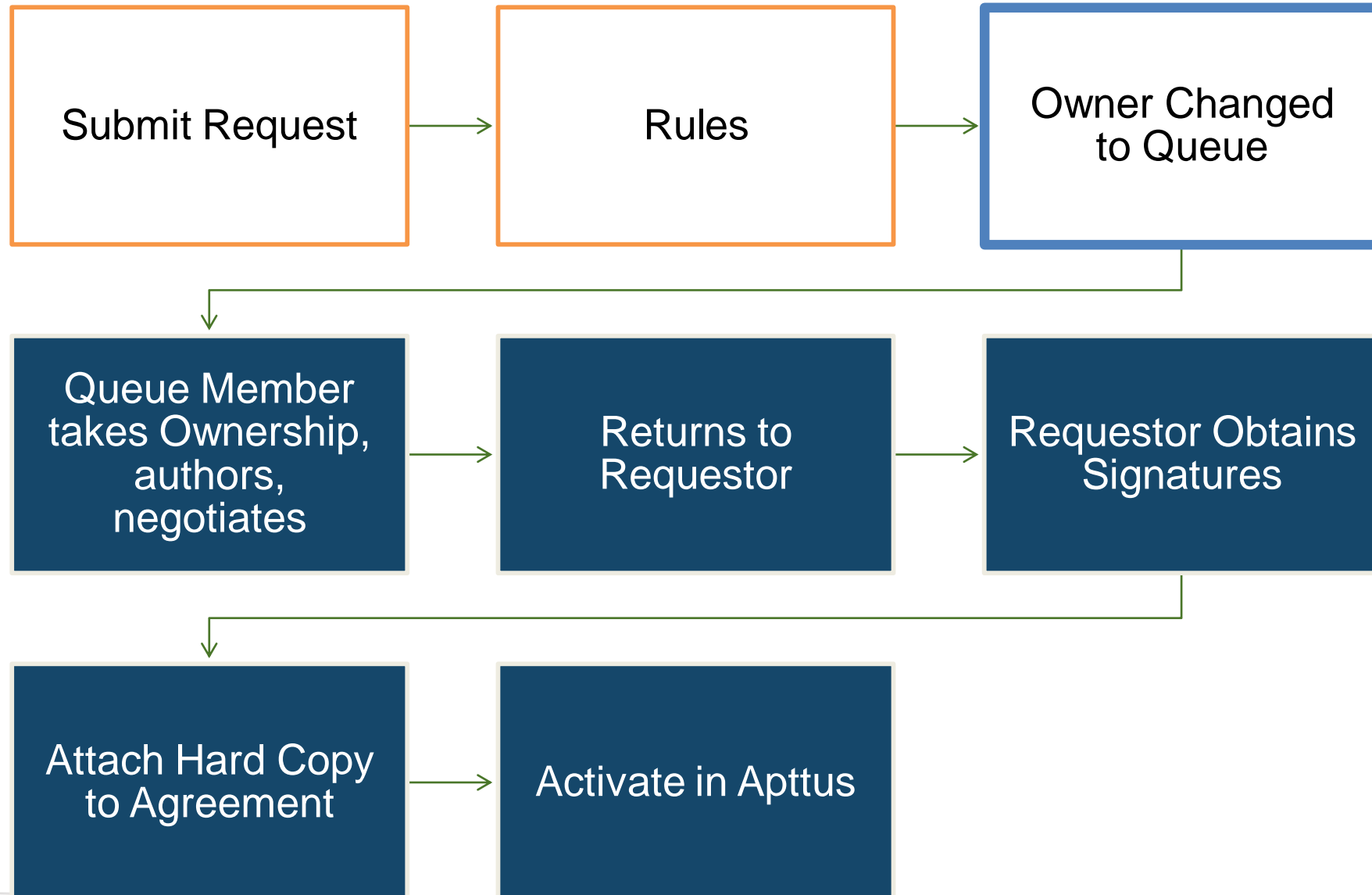
Agreement Rules



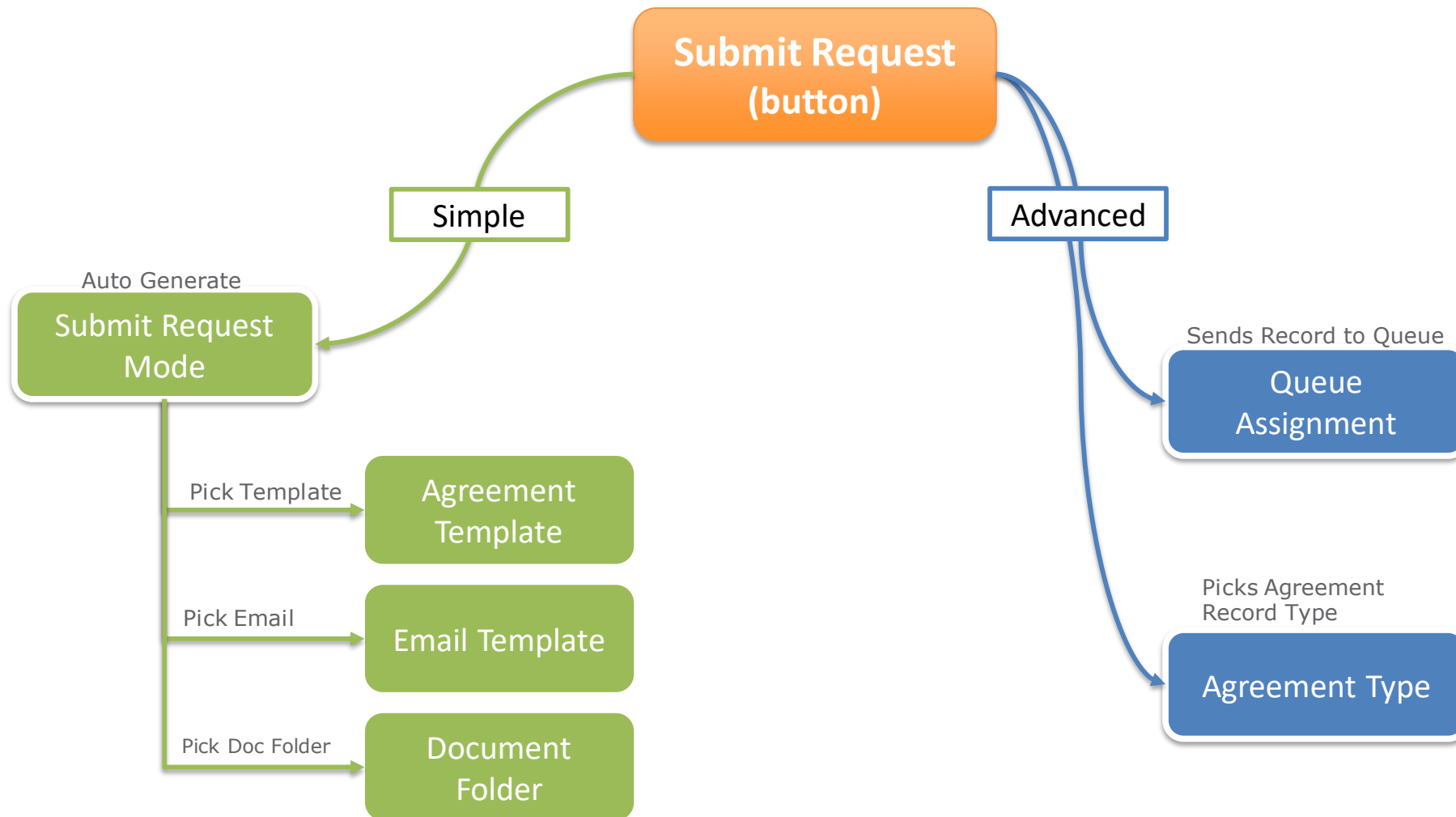
Simple Flow




Advanced Flow



Agreement Rules



Agreement Rules

 Agreement Rule Edit
New Agreement Rule

Save Save & New Cancel


Rule Information | = Required Information

Sequence

Rule Type

Rule Value

Rule Description

Active  ☒

Inclusion Criteria

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

Filter Criteria

Field	Operator	Value		
--None--	--None--		AND	
--None--	--None--		AND	-
--None--	--None--		AND	-
--None--	--None--		AND	-
--None--	--None--		+	-

Advanced Options

Save Save & New Cancel

Trigger: Submit Request
action button

One Inclusion Criteria –
the WHAT (use as
generic inclusion)

Multiple Filter Criteria –
the WHEN
(specific inclusion)

Agreement Creation with Wizards

Agreement Wizard

What?

- Quick create for Agreements

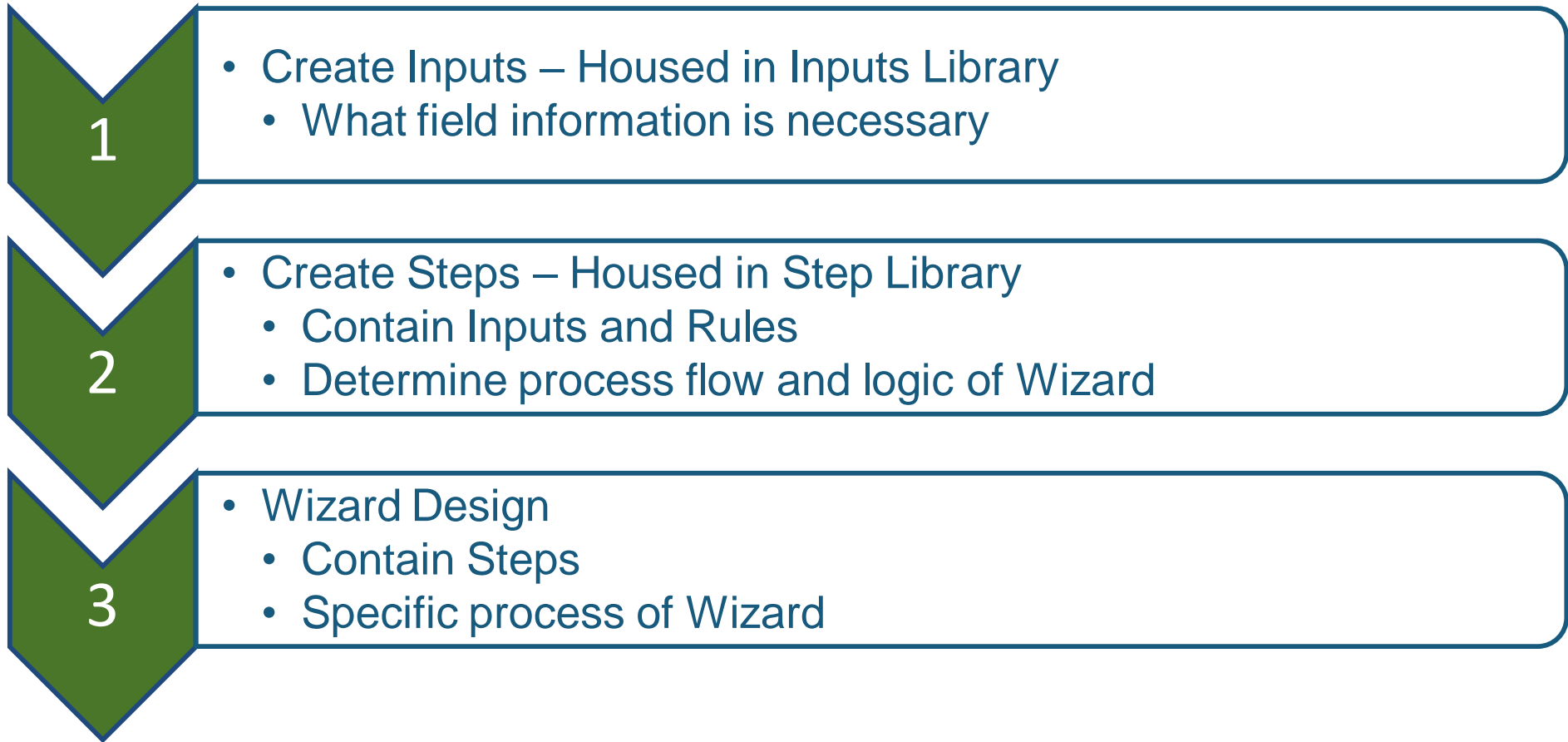
How?

- Inputs
- Steps
- Wizard Design

Challenges?

- Users
- Interface
- Process
- Available Data

Agreement Wizard



Inputs

- Represent fields or information placeholders
- Reusable in multiple different steps

Enter Input Name

Input Settings

Preview

Control Name

Enter name to proceed

Description

Keywords

Category

Default

Subcategory

Default

Question/Instruction

Runtime Help Text

Runtime Input

☐ Allow Comments and Attachments
☐ Required
☐ Read Only

Field Class

Object Field

Input Control

Object Name

--None--

--None--
Account
Account Billing Summary
Account Location
Adjustment Line Item
Admin
Aeronautics Components
Agreement Action Condition
Agreement Adjustment Line Item
Agreement
Agreement Clause
Agreement Document
Agreement Document Output Format
Agreement Fee Adjustment
Agreement Fee
Agreement Fee Schedule

Steps

- Groups of Inputs
- Determines logical flow of information/Wizard
- Reusable in multiple different Designs

Enter Step Name

Step Settings

Input Rules

Step Preview

Step Name

Enter name to proceed

Description

Keywords

Category

Default

Subcategory

Default

Banner Statement

Runtime Help Text

Context Type

All

Context Object

--None--

Input Group Option

--None--

Inputs

⚠ Drag inputs from library or create new.

New Input

Inputs Library

Search Wizard Inputs

(Demo) Account Name

(Demo) Region

(Demo) Start Date

Agreement Category

Agreement Name

Language

Primary Contact

Status Category

Steps

- Set Rules for Step/Wizard behavior

(Demo) Agreement Step 1

Step Settings **Input Rules** Step Preview

Agreement Name +

1.1 Determine Focus Object Agreement

Rule For: Agreement Name ✕

Rule

Determine Record Type Agreement NDA -Instructor

[Add Another Rule](#)

Save Cancel

❗ No custom rules set for this input

Design

- Collection of Steps
- Determines logical flow of Steps and process

Enter Wizard Name

Activate

Wizard Settings

Wizard Step Rules

Design Name

Enter name to proceed

Description

Keywords

Category

Default

Subcategory

--None--

Banner Statement

Context Type

All

Context Object

--None--

Static Resource

CSS Filename

DataSource Callback

Meta Property FieldSet Name

Submit Page Options

☐ Allow Review Edit

Steps in Wizard

⚠ Drag steps from library or create new.

Submit Configured by Rule

Abort Configured by Rule

New Step

Steps Library

Search Wizard Steps

(Demo) Agreement Step 1

(Demo) Agreement Step 2

(Demo) Region

Design

- Set Step rules to guide user behavior within Wizard

The screenshot displays a configuration window titled "(Demo) Instructor 3 step Demo" with an "Activate" button in the top right corner. The window has two tabs: "Wizard Settings" and "Wizard Step Rules", with the latter being the active tab. Below the tabs, a list of steps is shown: "step: (Demo) Agreement Step 1", "1.1 goto (Demo) Region", and "1.2 goto (Demo) Agreement Step 2". A modal dialog titled "Rule For: (Demo) Region" is open, featuring a "Go to" dropdown menu with options: "(Demo) Agreement Step 1" (highlighted), "(Demo) Agreement Step 2", "(Demo) Region", "Submit", and "Abort". The dialog also includes "Save" and "Cancel" buttons. Below the modal, a flow diagram is partially visible, showing a green bar for "step: Submit" and a pink bar for "step: Abort".

(Demo) Instructor 3 step Demo Activate

Wizard Settings Wizard Step Rules

step: (Demo) Agreement Step 1 +

1.1 goto (Demo) Region

1.2 goto (Demo) Agreement Step 2

Rule For: (Demo) Region ✕

Step

Go to (Demo) Agreement Step 1 (selected)

(Demo) Agreement Step 2

(Demo) Region

Submit

Abort

Save Cancel

step: Submit

step: Abort

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- Register here: <http://apttus.com/university>



- To be “Apttus Product Certified” each person must *pass the exam* AND demonstrate proficiency through *completing the project* and *presenting a configured org.*

An aerial night view of a city skyline, likely New York City, with a blue semi-transparent overlay across the center. The text "Thanks for joining" is centered in white. The background shows a dense urban landscape with numerous skyscrapers and illuminated streets.

Thanks for joining