

**Project Guide
Contract Lifecycle
Management
Product Certification**



APTTUS

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Contract Lifecycle Management Project

The Apttus Contract Lifecycle Management (CLM) Certification Project is designed to guide new Contract Management Solution Architects, Business Analysts, Consultants and/or Administrators through the different CLM steps and apply the concepts taught in the Contract Lifecycle Management and Template Administration course(s).

The intent of this project is to apply existing Salesforce knowledge to Apttus CLM objects. Each student will be provided with a dedicated instance which can be used to configure the application based on business requirements.

Prerequisites

- Contract Lifecycle Management overview course
- Basic SFDC Administrative experience
- Review of the following Salesforce online courses (<https://help.salesforce.com>)
 - Getting Started: Navigating Salesforce (20mins)
 - Getting Started: Administering Salesforce (50mins)
 - Getting Started with Reports and Dashboards (20mins)

Pre-Installation

Apttus Org

1. Instructor will provide details of your own org.
2. Upon log in, you will be prompted to enter a verification code. Click 'Email me a verification code'.
3. Instructor will provide verification code. Enter the code and log in.
4. Go to Setup > Administration Setup > Manage Users > Users.
5. At the User Detail page, click Edit next to the username you logged in as.
6. Change all Email addresses to your corporate email address and Save. **The address must be valid.**
7. If necessary, you can change the username that you will use to log in to the Salesforce org. It must be unique (eg., jdoe@acme.clmcert.com)
8. You will receive an email to your corporate address.
9. Click the link in the email to verify changes.

Licenses

Your Certification org contains Apttus CLM, Salesforce and Platform licenses for use.

When creating users and profiles for your project, clone the Apttus U Student Admin profile and edit to meet the requirements.

When creating a user, update the details of an existing one. Ensure you update the following:

- Email: Enter your corporate email address
- Username: Enter a unique log in username
- User License: Select the appropriate Salesforce User License
- Profile: Select the appropriate Apttus profile

Key Deliverable

Acme wants to use Apttus Contract Management to manage their Non-Disclosure Agreements (NDA) and Service Level Agreements (SLA) with customers who purchase products and Customer Support.

As the Acme System Administrator, you are tasked with configuring the application to meet the following requirements.

Basic Administration

- There are 3 new types of Agreements: SLA, NDA Unilateral, NDA Bilateral. All NDAs are in English
- Users should only create agreements from the Account or the Wizard
- Acme would like a quick and easy way to launch the Agreement Wizard.
- The Following information needs to be captured when creating a SLA agreement through the wizard:

Agreement Name	Account
Primary Contact	Start Date & End Date
Support	Language
Payment Terms	Region
Agreement Category	

- The NDAs have two distinct behaviors:
 - When *Unilateral* is selected, the agreement is generated automatically in PDF and sent via email to the Account contact.
 - When *Bilateral* is selected, the agreement is forwarded to the Legal Queue for review.
- Users must not be able to manually generate any type of NDA document.

Template Administration

- Create the NDA and SLA templates
- Acme's customer base is primarily in North America and Spain. Template selection, when generating an SLA, should be logically synced with the agreement.
- SLA Services for Training, Maintenance and Installation are captured as a related list and displayed on the generated document.

Contract Negotiations

- Any modification to the Governing Law section needs to be tracked for auditing purposes.
- Negotiation of the Start Date, End Date, and Payment terms can lead to out-of-sync data between the Document and the Agreement Record. Demonstrate how these discrepancies can be prevented.

Usability Features

- Acme has three clauses, each conditional based on the collective values of the Support Exhibits, Agreement Category, and Region fields.
- Acme sometimes has large Agreements which take a long time to generate. Demonstrate how the user can generate the document in the background while continuing to work within their org.
- Company Policy requires all documents to have the agreement version and be date/time stamped. The CEO prefers the format of exact time, year, month, calendar date and day of generation.
- The CEO is concerned that his internal team does not receive customer signatures on

their SLAs in a timely fashion. Present the CEO with this information.

Extra Credit

- Acme is not using an eSignature application. Implement a process to indicate when ALL signatures are complete and the agreement record is ready for activation.
- Create one wizard that can produce both SLAs and NDAs
- Add the ability to create Agreement Line Items within the SLA wizard