Contract Lifecycle Management
Basic Administration
Student Guide

APTTUS

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Overview

Introduction	Apttus provides powerful, flexible tools that you can use to streamline your contract management. This guide will help you learn the concepts and tasks necessary to be a successful Apttus Contract Management Administrator. Apttus Contract Lifecycle Management Administration training is a comprehensive learning experience covering all relevant aspects of implementation. This workbook presents a series of exercises that reinforce each topic. The specific details presented in this document may not be identical to your Salesforce org.
Prerequisite Knowledge	This course assumes that you have a basic understanding of the Salesforce environment and infrastructure as well as a valid Salesforce (SFDC) account with an Apttus CM license. Knowledge of relational database concepts can be helpful but is not required.
Objectives	After completing this course you will be able to: • Understand how Apttus Contract Management applies to the Contract Lifecycle. • Understand configuration settings as they relate to business requirements • Manage Agreement and Process administration • Perform User Maintenance

Terms & Definitions

The following are terms that will be used frequently throughout this course:

- **Organization/Org:** A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications, and is separate from all other organizations.
- **Objects:** A definition of a specific type of information you can store in Salesforce. Some objects are native to Salesforce (such as Contacts or Accounts) while others are specific to Apttus functionality (such as Templates or Agreements)
- **Records:** A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity.
- **Templates:** Blueprints used to generate a wide variety of document types when merged with data from quotes, proposals, or agreements.
- **Agreements:** The set of terms and conditions agreed between two or more parties stored in fields on a Salesforce record.
- **Documents:** The dynamically generated output from the merging of an agreement record's data in Salesforce with the static text of a template.

Exercise #1 Create an Agreement record

It is important to understand the basic format and components of an agreement record. In this exercise, you will create an agreement.

Step	Action
1	Select **Apttus Contract Management** from the Salesforce Force.com App Menu picklist in the top-right corner.
2	Click the **Agreements** tab.
3	In the Recent Agreements section, click **New.**
4	Select **MSA** from the Record Type picklist and click **Continue.**
5	Enter MSA-*yourinitials* in the **Agreement Name** field. The record type is defaulted into this field.
6	Enter “ABC” in the **Account** field. Click the magnifying glass icon, and select the ‘ABC Company’ account from the Lookup dialog window. Enter Diego Francis as the **Primary Contact** by entering ‘Diego,’ clicking on the Lookup icon, and selecting ‘Diego Francis’ from the Lookup dialog window. Enter today’s date next to **Agreement Start Date**.
7	Click **Continue**.
8	Review the fields on the Agreement Edit page. Click **Save**
Result	You have created a new agreement record.

Agreement Object

Setting up a new Agreement type

Exercise Scenario:

As Apttus Administrators for Acme Inc., we will be creating a new type of agreement record to capture Non-Disclosure Agreements. These NDAs have the following properties:

- By default, the NDA should be generated in PDF format but the user can override this and generate it in a format of their choice.

- If the NDA is generated in MS Word, track changes is turned on and cannot be turned off by the counter signer during negotiations.

- NDAs are offered in multiple Languages and Regions. The system will present the template that matches the language and region selected on the Agreement when the document is generated manually.

- The NDA document can be automatically generated if standard legal language is used and emailed to the Primary Contact on the Agreement record. If the NDA contains Non-Standard Legal Language, it must be reviewed by Legal queue before being generated.

Exercise #2 Create an Agreement Record Type

Before you use the Apttus CM application to manage contracts, you must define the agreement record types. An *agreement record type* is a way of categorizing agreements and allows us to provide different page layouts to users based on their profile.

Some samples of agreement record types are:

- Non-Disclosure Agreement (NDA)
- Master Subscription Agreement (MSA)
- Software License Agreement (SLA)
- Statement of Work (SOW)

In this step, you will create an NDA record type for use in this session.

Step	Action
1	Click **Setup.** Expand the **Create** link found under **Build**. Click **Objects**, then in the list of Custom Objects, click **Agreement.** Use the hover link or scroll down to **Record Types** and click the **New** button.
2	Select NDA as the Existing Record Type.
3	Type: NDA-*yourinitials* as the Record Type Label. Press the Tab key to automatically populate the Record Type Name field. **NOTE**: The default behavior is to automatically pass the same text string from Record Type Label to the Record Type Name, with spaces replaced by underscores. The Record Type Name is the API name in Salesforce.
4	Enter a **Description**.
5	Select the **Active** checkbox.
6	Select the checkbox next to **Enable for Profile** to make the record type available for all profiles. Do not select any item in the Make Default column. Click **Next**.
7	Select the existing **NDA** page layout and apply it to all profiles.
8	Click **Save**.
Result	The new record type can be used to create a new agreement.

Exercise #3 Enable Agreement Record Type for Template Authoring

In order to generate a document, Template Administrators need to associate templates with Agreement record types. Before this is possible, the record type must first be set up for Template Authoring.

In this step, you will enable your new NDA record type for Template Authoring.

Step	Action
1	From the **Setup** menu open from the previous exercise, navigate to **Create > Objects > Template.**
2	Select **Custom Fields & Relationships**, then click on the **Agreement Types** Field Label.
3	Scroll down to the **Value** section and click **New.**
4	Type **NDA-*yourinitials*.** The value must exactly match the record type label you created.
5	Click **Save.**
Result	The new record type now displays in the Agreement Type picklist field on an agreement template. A template can now be associated with the new record type.

Exercise #4 Associate Agreement Record Types with Templates

Now that the Agreement Record has been set up for Template Authoring, it needs to be associated to a specific template in order to generate a document.

This step enables your new NDA-*yourinitials* agreement record type to use English and Spanish NDA templates for document generation.

Step	Action
1	Click the **Templates** tab.
2	Click the **Go!** button next to the **View: All** picklist selection.
3	Select the template you want to associate: **NDA English - Americas.**
4	From the Template detail page, click the **Edit** button.
5	In the **Agreement Types** field, in the **Available** picklist on the left, select your new NDA-*yourinitials* record type. Click the right arrow to move your new agreement type to the **Chosen** picklist.
6	Click **Save.**
7	Repeat steps 1-6 to associate your NDA record type with the **NDA English – EMEA, NDA Spanish – EMEA,** and **NDA Spanish - Americas** templates.
Result	Your NDA agreement record can now utilize all of the NDA templates for generation.

Agreement Document Output Formats

The Apttus Administrator can allow end users the option of specifying a document output format upon generation. However, the Administrator can restrict which document formats are available.

You can setup organization-wide default formats to be used for generating documents, at User Profile and Agreement Type levels. Along with specifying the format, the Administrator can also indicate whether the end user can override the default format.

Exercise #5 Set Document Output Formats

Set up PDF as the default document format that is generated by System Administrators for your NDA agreement type. In addition, allow users to select a different format if necessary.

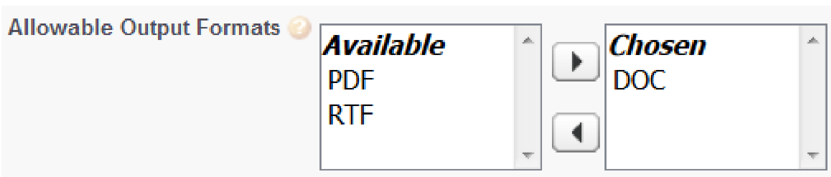
Step	Action
1	Click **Your Name** (next to Setup) **> My Settings > Personal** (in the left pane**) > Advanced User Details**
2	Find the 'Profile' field and note the current value – verify that you have been assigned the 'System Administrator' profile. This will be referenced throughout this exercise guide.

Step	Action
1	Click the **Agreement Document Output Formats** tab.
2	Select your user profile (found in the previous part of this exercise), then click **Edit**.

3	Select the radio button for PDF for your NDA-*yourinitials* agreement type.
4	Check the box for **Allow Override**.
5	Click **Save**.
Result	Your NDA agreement record will default to display in PDF when previewed/generated/re-generated by the System Administrator.

NOTE:

It is also possible, within a specific agreement record, to set available document formats via the Allowable Output Formats field. This setting takes precedence over all other document format settings.



Agreement Protection

Protection levels restrict what specific profiles can do with generated documents. For example, the **Read Only** protection level provides read-only access, while the **Insert Comments and Track Changes Only** level captures any modification made to the document generated by a certain profile.

It is possible to provide different levels of document protection based on the profile assigned to the user and the action a user is performing. For example, the Administrator can specify that a user with the Sales profile is allowed full document access when generating or re-generating a document, but that Track Changes is enabled when the user sends a document for review.

If no protection is set, then all users are allowed full document access with all actions.

NOTE:

Appropriate admin settings should be applied before Agreement Protection can be enabled, i.e. Protection should be turned 'on' and an unlock password created

Exercise #6 Enable Track Changes

Enable automatic capture of comments and edits made to documents generated by Apttus Administrators. Ensure that 'Track Changes' cannot be disabled.

Step	Action
1	Click the **Agreement Protection** tab.
2	Click **New**.
3	Enter a **Description**.
4	Type **your profile name** in the Profile Name field.
5	Select **Generate Agreement** from the Actions picklist
6	Select **Automatic** in the Protection Type picklist.
7	Select **Insert comments and tracked changes only** in the Protection Level picklist.
8	Click **Save**.
Result	This enables Track Changes for the generated Word document, which cannot be disabled by any user editing the agreement document, unless they enter the Unlock password set by the Administrator.

Query Templates

By creating query template filtering rules, administrators can define which templates display when previewing, generating or re-generating documents.

For example, if agreement templates are created for multiple regions, a user should only be able to select templates appropriate for the region they belong to. The template filter uses agreement fields and related child object fields to select the templates to display.

For our scenario, four NDA templates currently exist in the system, all of which are available upon generation of an NDA. The user must manually select which template s/he wants to use.

The Query Template will look for a match between fields on the Agreement and Template records. The Agreement record contains a 'Language' field with the possible values of English or Spanish, while the Template record contains a similar 'Language' field. The Agreement also contains the 'Region' field with EMEA, APAC, and Americas as values. The Template contains a 'Local' field with EMEA, APAC, Americas, and multiple other values. By comparing and finding a match between the 'Language' and the 'Region'/'Local' fields values on the Agreement record and Template records, the Query Template will present the appropriate template for document generation.

Exercise #7 Create a Query Template

Step	Action
1	Select the **Query Templates** tab.
2	Click **New**.
3	On the **Query Template Edit** screen, enter 1 as **Sequence**.
4	Retain all other default values and **Save**.
5	Click **New Query Template Qualifier** from the **Qualifiers** related list.
6	Enter 1 as **Sequence**.
7	Retain Agreement as **Object**.
8	Type **RecordType.Name** for the **Field** value.
9	Retain **Comparison Operator** as 'equal to.'
10	Type **NDA-*yourinitials*** in the value field. This must be an exact match to your record type label.
11	Retain **Apttus__APTS_Agreement_c** in the SObject Type.
12	Click **Save**. Click QT-#### (top right of page) to navigate back to your query template record.
13	Click **New Query Template Filter** from the **Filters** related list.
14	Enter 1 as **Sequence**.
15	Type (or copy) **Apttus__Language__c** for the **Field** value.
16	Retain **Comparison Operator** as 'equal to.'
17	Type (or copy) **Apttus__APTS_Agreement__c.Language__c** in the **Value** field.
18	Click **Save**.
19	Click the QT#### to navigate back to the query template record.
20	Click **New Query Template Filter**.
21	Enter 1 for **Sequence**.
22	Type (or copy) **Apttus__Locale__c** for the **Field** value.
23	Retain **Comparison Operator** as 'equal to'.

24	Type (or copy) **Apttus__APTS_Agreement__c.Region__c** in the **Value** field
25	Click **Save**.
Result	When a specific language is selected on the agreement record, the associated template is automatically used for document generation.

Agreement Rules Object

Agreement Rules allow you to identify how an agreement request is processed when the Submit Request action button is clicked. If an end user does not have permission to generate documents, Agreement Rules can be used to fulfill agreement creation requests.

Based on the administrator-defined criteria for a particular Agreement record type, Agreement Rules can dictate if:

- A document is generated automatically when the agreement is submitted for processing.
- An agreement is sent to a queue for review and processing

Functionality and Benefits

There are two general ways to set up the agreement request process:

i. Auto Agreement Generation or Self-Service

Auto-generation is used when the agreement document is to be automatically generated versus the manual action of clicking the 'Generate' button and running through the generation process.

ii. Assigned to Queue (Legal Assist Mode)

When Legal involvement is required, we need to set up the manual Agreement Request Process. The queue can then review the request and determine how to proceed.

Exercise #8 Create Agreement Rules

Auto-Generation Use Case

For our exercise, if our NDA record contains only standard legal language (if checkbox field *non-standard legal language* = False), a document can be automatically generated when the Submit Request action button is clicked, as well as a copy emailed to the Primary Contact on the Agreement record.

We will create three Agreement Rules to accomplish this:

1. Submit Request Mode defines how the document is generated.
2. Agreement Template defines which template will be used when the document is generated.
3. Email Template defines which email template to use when emailing the generated document to the Primary Contact (set on agreement record)

Legal Queue Assignment Use Case

If the NDA record specifies Non-Standard Legal Language, the document is not generated and the record is forwarded to the Legal queue for review.

We will need one Agreement Rule to accomplish this:

1. Queue Assignment assigns the record to a specific queue for member(s) to review.

Ex. 8.A Submit Request Mode rule creation

Step	Action
1	Click the **Agreement Rules** tab.
2	In the Recent Agreement Rules section, click **New.**
3	Type **1** in the Sequence number field.
4	Select **Submit Request Mode** as the Rule Type.
5	Type **Auto** in the Rule Value field.
6	Create Inclusion criteria where **Record Type** is equal to **NDA-*yourinitials***.
7	Create Filter criteria where **Non Standard Legal Language** is equal to **False**.
8	Click **Save & New**.

Ex.8.B Agreement Template rule creation

Step	Action
1	Type **1** in the Sequence number field.
2	Select **Agreement Template** as the Rule Type.
3	Type **NDA English - Americas** in the Rule value field.
4	Create Inclusion criteria where **Record Type** is equal to **NDA-*yourinitials***.
5	Create 2 Filter Criteria where **Language** is equal to **English**, and **Region** is equal to **Americas**
6	Click **Save & New**.

Ex. 8.C Email Template rule creation

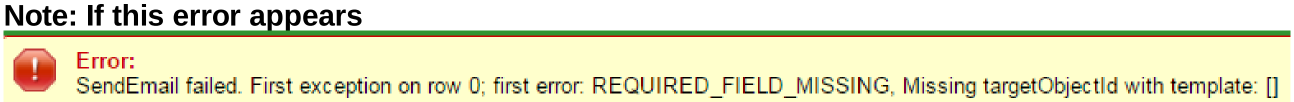
Step	Action
1	Type **1** in the Sequence number field.
2	Select **Email Template** as the Rule Type.
3	Type **Agreement Review Notification (Auto)** in the Rule Value field.
4	Create Inclusion criteria where **Record Type** is equal to **NDA-*yourinitials***.
5	Create Filter criteria where **Non Standard Legal Language** is equal to **False**.
6	Click **Save & New.**

Ex. 8.D Queue Assignment rule creation

Step	Action
1	Type **2** in the Sequence number field.
2	Select **Queue Assignment** as the Rule Type.
3	Type **Legal** in the Rule Value field.
4	Create Inclusion criteria where **Record type** is equal to **NDA-*yourinitials***.
5	Create Filter criteria where **Non Standard Legal Language** is equal to **True**.
6	Click **Save**.

Result: If the NDA contains standard legal language, the user can click on the Submit Request button to automatically generate the document, and have it sent to the agreement primary contact. If the agreement contains non-standard legal language, the record if forwarded to the Legal Queue for review.

Note: If this error appears



Make sure there is a Primary Contact on the Agreement record.

Validate your work

Now that Acme's Contract Management system has been set up according to Acme's requirements, the users can create and perform actions on NDA agreements.

In this exercise, you will play the role of an end user creating a new NDA agreement and performing actions on it.

Step	Action
1	Click the **Agreements** tab.
2	In the Recent Agreements section, click **New.**
3	Select **NDA-*yourinitials*** from the Record Type picklist and click **Continue**.
4	Enter a name of your choosing in the **Agreement Name** field.
5	Enter "ABC" in the **Account** field. Click the magnifying glass icon and select the ABC Company account from the Lookup dialog window. Enter today's date next to **Agreement Start Date**. Enter Diego Francis as the **Primary Contact**.
6	Select **English** from the **Language** picklist and **Americas** from the **Region** picklist. Ensure **Non Standard Legal Language** is <u>not</u> checked.
7	Click **Continue**.
8	Review the fields in the Agreement Edit page. Click **Save.**
9	Click **Preview** to validate that "NDA English – Americas" is the only template available (this is the result of the Query Template). Validate that PDF is selected by default, but can be overridden (due to how Agreement Document Output Formats are set up). Click **Return**.
10	Edit your agreement record and change the language to **Spanish**. Click **Save**.
11	Click **Preview** to validate that "NDA Spanish – Americas" is the only template available (this is the result of the Query Template). Click **Return**.
12	Search for 'Diego Francis' by typing his name into the Search field at the top of the screen.
13	Open Diego Francis' Contact record and update his email address with yours. Return to your agreement record.
14	Click **Submit Request** (this will initiate the Agreement Rules). Validate that agreement is automatically generated in PDF format and attached to the agreement record in the **Document Versions** related list. Check the email address associated to Diego Francis (this should be yours), and verify that you have received the Review Notification email with the generated document attached.
15	Repeat steps 1 – 8. Check the **Non-Standard Legal Language** checkbox and click **Save**.
16	Click **Submit Request**. Notice the value in the Owner field changes to Legal, indicating that the agreement record is now owned by the Legal queue, and anyone in the queue can take action on the record. In order for someone in the Legal Queue to view all agreements submitted for review, s/he can click on the Agreements tab and change the View picklist value from **Demo Agreements** to **Legal**. Try this!
Result	Your CLM product configurations work successfully.

Agreement Wizard

Functionality and Benefits

The Apttus CM Configurable Wizard generates user-friendly on-screen Wizards to quickly create contracts. The Wizards are intended for use by non-expert users (sales representatives, purchasing agents, HR managers and other).

A Wizard prompts the end user to answer a series of on-screen questions then creates the Agreement record.

Capabilities

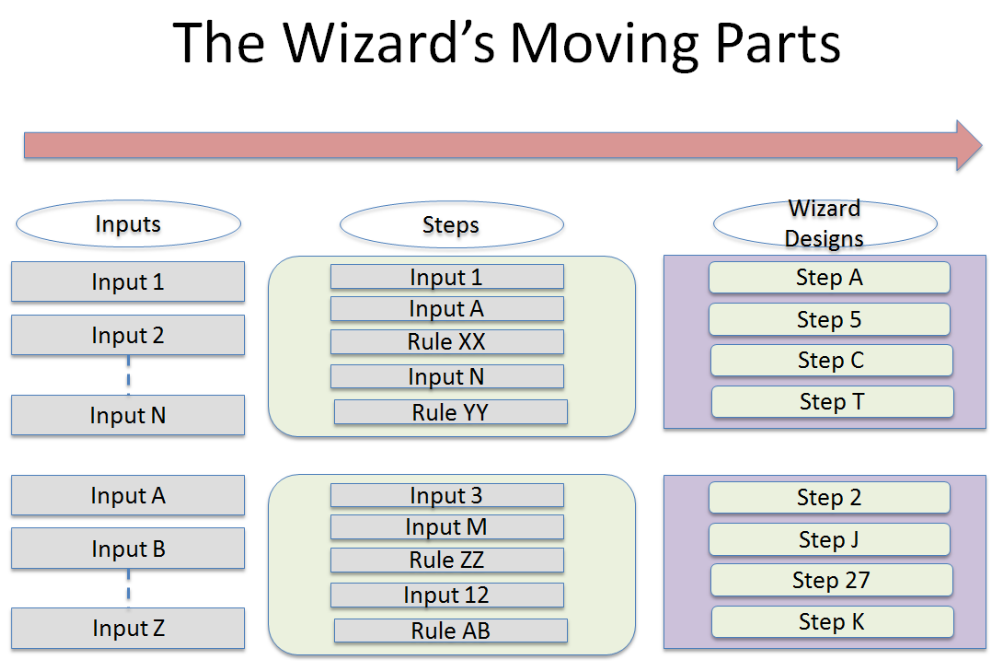
Through the Wizard, you can do the following:

- Create any type of contract or account
- Enable the creation of well-formed contracts by non-legal participants such as:
  - Sales Reps
  - Purchasing Agents
  - HR Managers
  - Partner Managers
  - Internal and External Self-Services/Kiosk Contracts
- Create accounts while creating a contract
- Use your company's own terms and interface flow
- Change or add Wizard designs to meet changing needs

Configuration Steps

As an administrator, the wizards you create are stored as Wizard Designs. Wizard Designs are comprised of a series of Inputs and Steps, governed by rules that determine the flow and resultant values of the Wizard.

The configurable wizard is split into three sections – **Inputs, Steps,** and **Wizard Design**. First, the admin creates Inputs; these inputs are then used to create steps. Finally, these steps are imported into the Wizard Design.



Considerations

Design considerations include the following:

- All contract creation processes, business functions, and end-users must be defined prior to creating the wizard itself.
- Agreement record types and custom fields needed to support the process must be present in the system prior to creating and using the wizard.
- As with any user interface flow, all use cases should be accounted for.
- Determine what set of users/profiles will need to run wizards.

Exercise Use Case

ACME needs to provide sales reps with a quick and easy way to create Non-Disclosure Agreements. All agreements must have the following fields completed: Agreement Name, Agreement Category, Account Name, Language, Status Category, Start Date, and Primary Contact.

Create an Agreement Wizard to meet the requirements for ACME NDAs.

The configuration steps follow:

Step	Action
1	Create the following Inputs: 1) Agreement Name 2) Account Name 3) Agreement Category 4) Language 5) Status Category 6) Start Date 7) Primary Contact
2	Create two Steps to account for the Inputs: 1) Step 1 a) Agreement Name b) Account Name c) Agreement Category 2) Step 2 a) Status Category b) Language c) Start Date d) Primary Contact
3	Create Wizard Design to incorporate Inputs and Steps.

NOTE: The following Inputs have already been created for you:

1. Agreement Name
2. Agreement Category
3. Language
4. Status Category
5. Primary Contact

Exercise #9 Creating Inputs

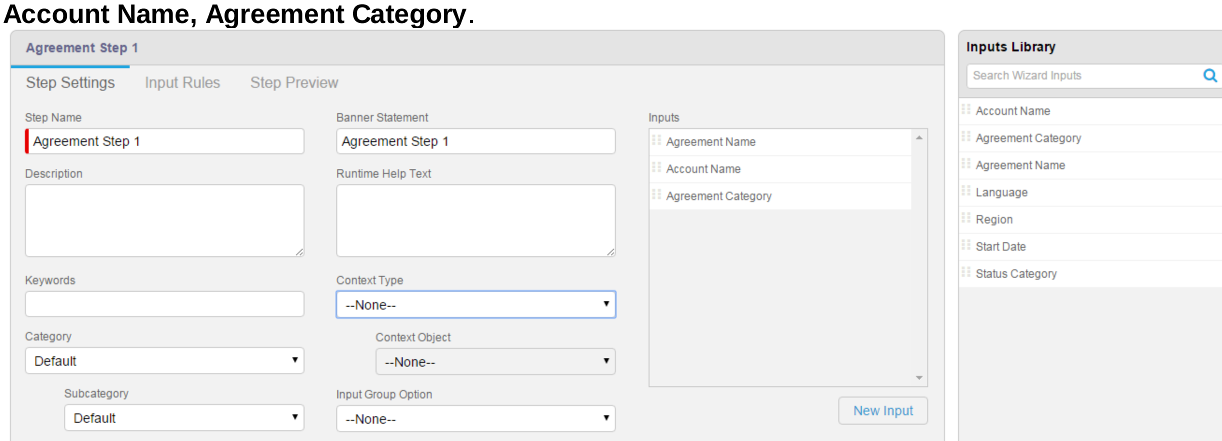
Inputs are questions and instructions that are provided to the end-user during runtime. They are reusable and can be used in multiple Steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Switch the Force.com App Menu to Apttus Configurable Wizard.</td></tr>
<tr><td>2</td><td>Navigate to the Wizard Component Library tab.</td></tr>
<tr><td>3</td><td>Click New Input Control. Fill in the following fields, then Save.
<table>
<tr><th>Field</th><th>Value</th></tr>
<tr><td>Control Name</td><td>Account Name</td></tr>
<tr><td>Question/Instruction</td><td>Please select an Account</td></tr>
<tr><td>Required</td><td>True</td></tr>
<tr><td>Field Class</td><td>Object Field</td></tr>
<tr><td>Object Name</td><td>Agreement</td></tr>
<tr><td>Field Name</td><td>Account</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click New Input Control. Fill in the following fields, then Save.
<table>
<tr><th>Field</th><th>Value</th></tr>
<tr><td>Control Name</td><td>Start Date</td></tr>
<tr><td>Question/Instruction</td><td>Please select a Start Date</td></tr>
<tr><td>Required</td><td>True</td></tr>
<tr><td>Field Class</td><td>Object Field</td></tr>
<tr><td>Object Name</td><td>Agreement</td></tr>
<tr><td>Field Name</td><td>Agreement Start Date</td></tr>
</table></td></tr>
<tr><td>Result</td><td>You have successfully created all the inputs needed to create the steps.</td></tr>
</table>

Exercise #10 Creating Steps

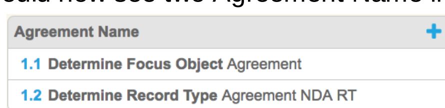
Inputs are placed in Steps. Steps can also contain rules that determine the flow and logic of the Wizard. (Apttus recommends using the Chrome web browser when configuring the Contract Wizard.)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Wizard Component Library, click New Step.</td></tr>
<tr><td>2</td><td>Enter “Agreement Step 1” as the Step Name and Banner Statement.</td></tr>
<tr><td>3</td><td>From the Inputs Library, drag and drop the following Inputs into the Inputs pane: Agreement Name, Account Name, Agreement Category.



</td></tr>
<tr><td>4</td><td>Click the Input Rules tab at the top of the page.</td></tr>
<tr><td>5</td><td>Next to Agreement Name click the +</td></tr>
<tr><td>6</td><td>Select Determine Focus Object as the picklist value under Rule.</td></tr>
<tr><td>7</td><td>In the following picklist, select Agreement.</td></tr>
<tr><td>8</td><td>Click Save.</td></tr>
<tr><td>9</td><td>Click the + next to Agreement Name.</td></tr>
<tr><td>10</td><td>Select Determine Record Type as the picklist value under Rule.</td></tr>
<tr><td>11</td><td>Select Agreement in the following picklist.</td></tr>
<tr><td>12</td><td>Select NDA-yourinitials in the following picklist. Click Save.

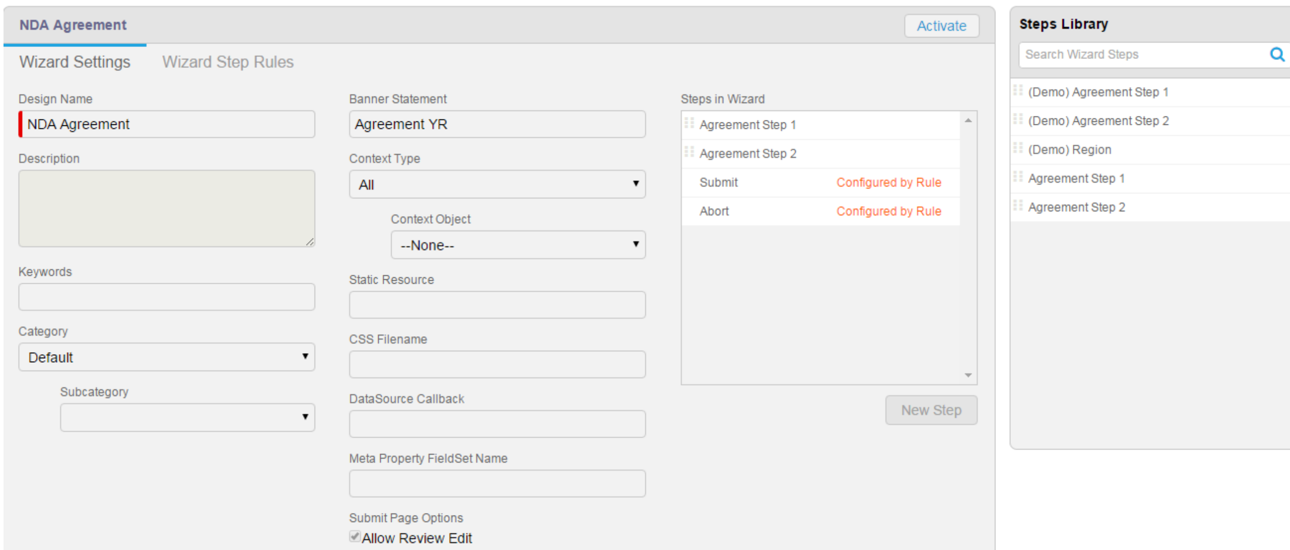
For Agreement Step 1, you should now see two Agreement Name input rules (1.1 and 1.2).



</td></tr>
<tr><td>13</td><td>Click Save.</td></tr>
<tr><td>14</td><td>Repeat steps 1 – 3 to create “Agreement Step 2”
Use the following Inputs: Start Date, Status Category, Language, and Primary Contact</td></tr>
<tr><td>15</td><td>Click Save.</td></tr>
<tr><td>Result</td><td>You have successfully created the two steps for the Wizard.</td></tr>
</table>

Exercise #11 Creating the Wizard

With the Steps created, the Wizard can now be designed. The Wizard determines the specific process the end-user will go through, based on Steps and Inputs.

Step	Action
1	Navigate to the **Wizard Designs** tab.
2	Click **New Wizard Design**.
3	Enter "**Agreement-**yourinitials" as the **Design Name** and **Banner Statement.**
4	Click the **Allow Review Edit** checkbox.
4	From the **Steps Library,** drag and drop **Agreement Step 1** and **Agreement Step 2** into the **Steps in Wizard** pane. 
5	Click **Activate**, and again in the popup window.
6	Click **Cancel** to exit Wizard Designs.
Result	You have successfully created the Wizard.

Validate your work:

Step	Action
1	Navigate to the **Wizards** tab.
2	Select your Wizard Design and click **Go**.
3	Enter an **Agreement Name**.
4	Using the magnifying glass icon, look up and select "**ABC Company**" for **Account**
5	Select "**Sales"** as the **Agreement Category**. Click **Next**.
6	**Select today's date as the Start Date.**
7	Select "**Request"** as the **Status Category.**
8	Select "**English"** for the **Language**
9	Using the magnifying glass icon, search for "**Diego Francis**" as your **Primary Contact.** Click **Next.**
10	Review all information entered. Click **Submit**.
11	The NDA type Agreement record is created.
Result	You have successfully created an Agreement through the Agreement Wizard.

Complex Agreement Wizard

Exercise Use Case

ACME requires that a region must be selected when creating Sales Contracts in order to route the Agreement correctly. To accomplish this, create a new input and step. A step rule then needs to be created so Sales Agreements are guided to a separate page requesting the region.

Exercise #12 Creating the Input

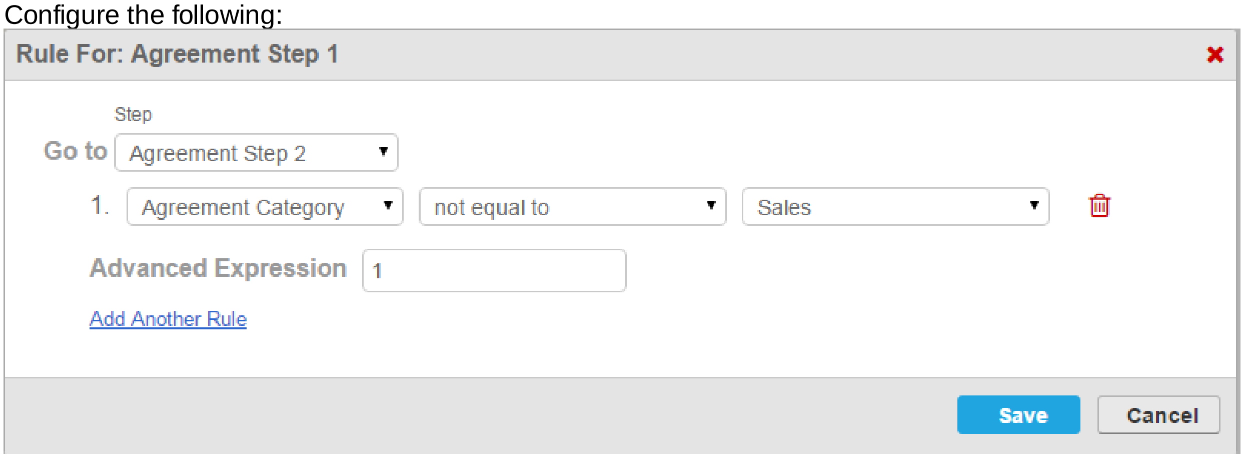
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the Wizard Component Library.</td></tr>
<tr><td></td><td>Click New Input Control. Fill in the following fields, then Save.
<table>
<tr><th>Field</th><th>Value</th></tr>
<tr><td>Control Name</td><td>Region</td></tr>
<tr><td>Question/Instruction</td><td>Please select a Region</td></tr>
<tr><td>Field Class</td><td>Object Field</td></tr>
<tr><td>Object Name</td><td>Agreement</td></tr>
<tr><td>Field Name</td><td>Region</td></tr>
</table>
</td></tr>
<tr><td>Result</td><td>You have successfully created an Input for Region.</td></tr>
</table>

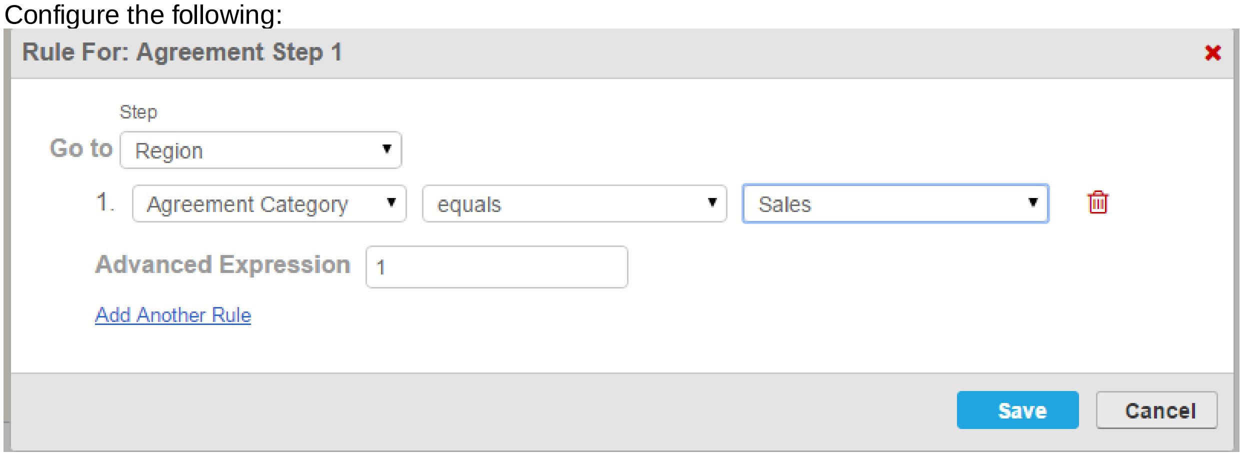
Exercise #13 Creating Steps

Step	Action
1	From the **Wizard Component Library**, click **New Step**.
2	Enter “**Region**” as the **Step Name.**
3	From the **Inputs Library**, drag and drop the **Region** Input into the **Inputs** pane
4	Click **Save**.
Result	You have successfully created all the two steps for the Wizard.

Exercise #14 Creating the Wizard

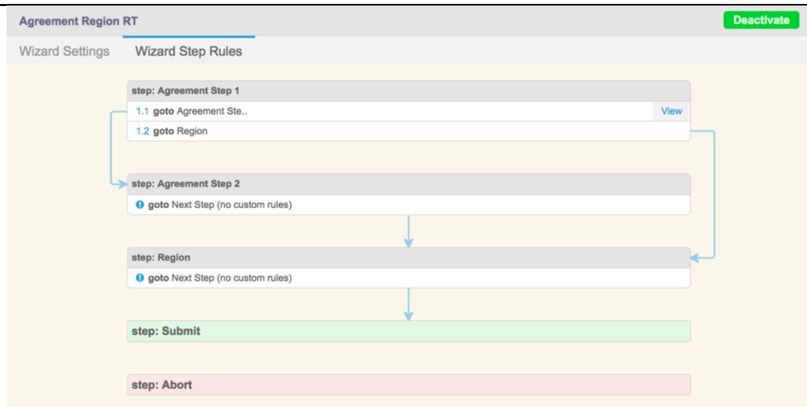
Now that the Steps are created, the Wizard can be designed. The Wizard determines the specific process the end-user will go through, based on Steps and Inputs.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the Wizard Designs tab.</td></tr>
<tr><td>2</td><td>Click New Wizard Design</td></tr>
<tr><td>3</td><td>Enter “Agreement Region-yourinitials” as the Design Name</td></tr>
<tr><td>4</td><td>From the Steps Library, drag and drop Agreement Step 1, Agreement Step 2, and Region into the Steps in Wizard pane.</td></tr>
<tr><td>5</td><td>Click the Wizard Step Rules tab.</td></tr>
<tr><td>6</td><td>Click the + for Agreement Step 1.</td></tr>
<tr><td>7</td><td>Set Go to to Agreement Step 2.</td></tr>
<tr><td>8</td><td>Click Add Another Rule.
Configure the following:


Click Save.</td></tr>
<tr><td>9</td><td>Click the + for Agreement Step 1 to create another rule.</td></tr>
<tr><td>10</td><td>Set Go to to Region</td></tr>
<tr><td>11</td><td>Click Add Another Rule.
Configure the following:


Click Save.</td></tr>
<tr><td>12</td><td>Click Activate twice.

You should see the flow of the wizard as shown below:</td></tr>
</table>

	
13	Click **Cancel** to exit Wizard Designs.
Result	When using the Wizard, if the Agreement Category is Sales, you will choose a Region, but <u>not</u> see Agreement Step 2. **I**f it is not Sales, you will see Agreement Step 2 followed by the Region step.

Validate your work

Step	Action
1	Navigate to the **Wizards** tab.
2	Select your "**Agreement Region – yourinitials**" Wizard and click **Go**.
3	Enter an **Agreement Name**.
4	Use the magnifying glass icon to lookup and select "**ABC Company**" for **Account**.
5	Select "**Sales**" as the **Agreement Category.** Click **Next**.
6	Select "**EMEA**" as the **Region**. Click **Next**. You will see the Region step, but not Agreement Step 2. Click **Back** to navigate back to **Agreement Step 1**.
7	Select a different **Agreement Category**. Click **Next**.
8	You now see Agreement Step 2. Select **today's date** as the **Start Date**.
9	Select "**Request**" as the **Status Category**.
10	Select "**English**" as the **Language**.
11	Using the magnifying glass icon, search for "**Diego Francis**" as your **Primary Contact.** Click **Next.**
12	Select any value for **Region**. Click **Next**.
13	Review all information entered. Click **Submit**.
14	The NDA type Agreement record is created with the added **Region** field.
Result	You have successfully created an Agreement using the Agreement Region Wizard and rules.

Appendix

Launching the Agreement Wizard

The best way to expose a wizard to end users is to create a custom sidebar link to launch each wizard.

There are two methods to display a link in the sidebar:

1. Create and add a link to the standard Salesforce Custom Links homepage component.

2. Create a custom sidebar component and a custom link(s) within that component.

Considerations:

-The link name should be descriptive and tell the user what will happen when they click it.

-If there are multiple wizards for different processes, a custom component may be the right solution to house all of them.

- Home page layouts are assigned by profile, custom components and links can be created for each type of contract that a user profile is allowed to create.

Exercise #16 Creating a Wizard Custom Link

In this exercise, create a link in the Custom Links component that launches the Agreement Region Wizard.

Step	Action
1	Navigate to the **Wizards** tab
2	Select the recently created Wizard **Agreements Region – Your Initials** from the Wizard Design picklist. Click **Go**.
3	When the first step page is displayed, **copy the full URL (including https://)** from the web browser window.
4	Navigate back to **Setup** in your first browser tab
5	Search for **Home Page Components** in the Setup search and click the link to go to the edit page.
6	Click **Edit** next to **Custom Links**
7	Create a new link by entering the following information: **Bookmark:** Create a Sales Contract **URL:** Paste the URL you just copied.
8	Click **Save**
9	*In this step, we'll add the Custom Links component to the Home Page layout if it's not already there. Repeat this step for all Home Page layouts that need the link.* Navigate to **Setup**
10	Search for **Home Page Layouts** and click the link.
11	Click Edit next to **Apttus Home Page**.
12	Click the Edit button. Select the **checkbox** next to **Custom Links**
13	Click **Next.** Click **Save**.
14	Click on the **Page Layout Assignment** button.
15	Click on the **Edit Assignment** button.
16	Next to System Administrator, select 'Apttus Home Page.'

Result	You can now launch the Wizard from the sidebar in Salesforce with the new custom link, ‘Create a Sales Contract.’

Validate Your Work:

Step	Action
1	Navigate to your **Home Page** Open the **Sidebar** Under the section: **Custom Links** select **Create a Sales Contract.** The Agreement Region Wizard will launch.
Result	You have successfully launched the Wizard from your Custom Links.

Agreement Rules types and creation steps

Agreement Rule Type = Submit Request Mode:

Automatic/Manual: Auto - mode triggers the generation of agreement document. Manual - the generation of agreement document requires the manual action of clicking the ‘Generate’ button.

Step	Action
1	Create a new Agreement Rule.
2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select **Submit Request Mode** as the Rule Type.
4	Enter **Auto** (or Manual) as the Rule Value.
5	Retain the Active checkbox selection.
6	If necessary, set the Inclusion Criteria. This determines the entry criteria for the process.
7	Select the field, operator, and value for your Filter Criteria. These fields determine which agreements are processed based on the submit request mode.
8	Click **Save**.

Agreement Rule Type = Agreement Type:

This parameter is used to identify the type of agreement to be created for this request. In case the Agreement Type is already identified as a filter in a previous rule, this parameter can be skipped.

Step	Action
1	Create a new Agreement Rule.
2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select **Agreement Type** as the Rule Type.
4	Enter the name of the record type as the Rule Value.
5	Retain the Active checkbox selection.
6	Click **Save**.

Agreement Rule Type = Agreement Template:

This parameter is used to identify the agreement template to be used for automatic generation of the agreement document.

Step	Action
1	Create a new Agreement Rule.
2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select **Agreement Template** as the Rule Type.
4	Enter the name of the template as the Rule Value.
5	Retain the Active checkbox selection.
6	Click **Save**.

Agreement Rule Type = Queue Assignment:

This parameter identifies the queue to which the ownership of the agreement is transferred to process the agreement request.

Step	Action
1	Create a new Agreement Rule.
2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select **Queue Assignment** as the Rule Type.
4	Enter the name of the queue as the Rule Value.
5	Retain the Active checkbox selection.
6	Click **Save**.

Agreement Rule Type = Email Template:

This parameter is used to identify the email template used for sending a notification email to predefined recipients, with the automatically generated agreement document attached.

Step	Action
1	Create a new Agreement Rule.
2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select Email Template as the Rule Type.
4	Enter the exact name of the email template as the Rule Value.
5	Retain the Active checkbox selection.
6	Click **Save**.

Agreement Rule Type = Document Folder:

The default repository to store executed contracts in Apttus Document folder. If you want to use the custom folder to store published contacts, specify the folder mane by selecting ‘Document Folder’ rule type with required conditions. In this way you can store your published contracts in multiple folders.

Step	Action
1	Create a new Agreement Rule.

2	Enter a Sequence number. If there is more than one rule, they are applied in the order of the sequence number.
3	Select Document Folder as the Rule Type.
4	Enter the exact name of the custom folder as the Rule Value.
5	Retain the Active checkbox selection.
6	Click **Save**.

Admin Object

The following table lists common one-time setup that you must perform after installation to enable users to use the Apttus Contract Management suite. These are completed through the Admin tab.

Name	Description	Value
APTS_AutoContentSearchable	Automatically enable Content Search on activated agreement.	True
APTS_Password	Create a password for protecting MS-Word agreements that are generated by the application. This should be provided to power users negotiating the contract.	<Your own password>
APTS_Protection	Specify whether protection for MS-Word agreements that are generated by the application should be on or off.	0 for OFF 1 for ON
APTS_DefaultEmailContactName	Specify the name of the default contact to resolve merge fields in an email template.	<Name of the user>
APTS_MS_EnableNameSort	Specify whether the related list should be sorted by the name field in the generated agreement document.	True
APTS_ShowSendEmailConfirmation	Display confirmation dialog box to confirm that the email was sent.	True
APTS_EnableTermExceptionsInAuthor	Enable Term Exception association to clauses via X-Author (Playbook/Section)	True

Profiles for CLM

Below are a few key considerations when creating and enabling profiles:

  - At the Custom Object screen for Agreement, select **Enable Reports**, **Track Field History**, and **Track Activities**.
    NOTE: Track Activities allows custom object fields to be used as merge fields when creating templates.
- At the profile screen:
  - Ensure Apex Class Access and VisualForce Page Access are enabled to access all Apttus functionality.
  - Under Custom App Settings, set **Apttus Contract Management** as visible.
  - Under Administrative Permissions, set:
    - **View Setup and Configuration** for profiles using Apttus X-Author Contracts
    - **API Enabled**
  - Under General User Permissions, set **Edit Tasks**.
  - Under Custom Object Permissions, set appropriate access for:
    - Agreement

- Agreement Clauses
- Agreement Documents
- Search Filters (both listed)
- Templates (minimum ‘Read’ level allows for generation of agreements)

Suggested Profile Configurations

	Requestor/ Approver	**Contract Creator/ Negotiator**	**Contract Manager**	**Apttus Administrator**
Custom App Settings				
Apttus Contract Management	Yes	Yes	Yes	Yes
Enabled Apex Class Access				
Apttus*	Yes	Yes	Yes	Yes
Enabled Visualforce Page Access				
Apttus*	Yes	Yes	Yes	Yes
Standard Tab Settings				
Accounts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Contacts	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Dashboards	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Reports	Use Existing Setting	Use Existing Setting	Use Existing Setting	Use Existing Setting
Apttus Custom Tab Settings				
Admin	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Document Output Formats	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Protection	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreement Rules	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Agreements	Default On	Default On	Default On	Default On
Cycle Time Groups	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Query Templates	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Retention Policies	Tab Hidden	Tab Hidden	Tab Hidden	Default Off
Templates	Default Off	Tab Hidden	Default On	Default On
Term Exceptions	Tab Hidden	Tab Hidden	Tab Hidden	Default Off

	Requestor/ Approver	Contract Creator/ Negotiator	Contract Manager	Apttus Administrator
Administrative Permissions				
Customize Application	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Edit HTML Templates	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Dashboards	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Public Reports	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
Manage Users	No (Use Existing Setting)	No (Use Existing Setting)	No (Use Existing Setting)	Yes
View Setup & Configuration	Yes	Yes	Yes	Yes
General User Permissions				
Create and Customize Reports	Use Existing Setting	Use Existing Setting	Yes	Yes
Edit Events	Yes	Yes	Yes	Yes
Edit Tasks	Yes	Yes	Yes	Yes
Export Reports	Use Existing Setting	Use Existing Setting	Yes	Yes
Run Reports	Use Existing Setting	Use Existing Setting	Yes	Yes
Send email	Use Existing Setting	Yes	Yes	Yes
Custom Object Permissions				
Admin	Read	Read	Read	Read, Create, Edit, Delete
Agreement	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Clause	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Agreement Document Output Format	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Line Items	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Agreement Protection	Read	Read	Read	Read, Create, Edit, Delete
Agreement Rule Condition	Read	Read	Read	Read, Create, Edit, Delete

Agreement Rules	Read	Read	Read	Read, Create, Edit, Delete
Agreement Term Exception	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
AsyncMergeCall	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Content Event	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Field Data	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Cycle Time Group Data	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Query Template	Read	Read	Read	Read, Create, Edit, Delete
Query Template Filter	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Query Template Qualifier	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Related Agreement	Read	Read	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Retention Policy	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Retention Policy	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit	Read, Create, Edit, Delete
Temp Object	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read, Create, Edit, Delete
Template	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Term Exception	Read	Read	Read, Create, Edit	Read, Create, Edit, Delete
Custom Record Type Settings for Agreements				
Record Types Edit to provide permissions for each Record Types.	Yes	Yes	Yes	Yes

Apttus Object Descriptions

Apttus Object	Purpose
Admin	Stores admin preferences and metadata.
Agreement	Represents an agreement in the system.
Agreement Clause	Represents a clause associated with an agreement.
Agreement Document	Links to agreement documents that are not stored in Apttus or the Salesforce repository. These could be URLs to files stored on a file server or document management system behind the client's firewall.
Agreement Document Output Format	Holds default output format preferences by user profile and agreement type for use in the agreement document generation process.
Agreement Line Item	Represents a product or service line item associated with an agreement.
Agreement Lock	Represents a lock on the agreement.
Agreement Protection	Specifies protection settings for agreements generated by the Apttus Contract Wizard and maintained by the Apttus Contract Author.
Agreement Rule	Specifies a rule used to evaluate various agreement actions such as submit request.
Agreement Rule Condition	Specifies a condition used to evaluate an agreement rule.
Agreement Term Exception	Term Exceptions associated with a given Agreement.
AsyncMergeCall	Holds asynchronous merge calls.
Comply Custom Classes	Registers custom classes that implement global interfaces exposed by Apttus for customization.
Comply System Properties	Represents comply system properties.
Content Event	Holds content events for subscribers to handle.
Cycle Time Field	Holds the fields monitored for cycle time data capture.
Cycle Time Field Data	Holds the data captured on fields for cycle time reporting.
Cycle Time Group	Holds the groups monitored for cycle time data capture.
Cycle Time Group Data	Holds the data captured on groups for cycle time reporting.
Merge Event	Holds document merge events for subscribers to handle.
Query Template	Query Template for building SOQL queries and filters.
Query Template Filter	Filter expression used in a query.
Query Template Qualifier	Filter used to select a query template.
Related Agreement	Identifies the different types of relationships between agreements.
Retention Policy	Holds object retention policies.
Search Filter (Comply)	Represents a search filter.
Temp Object (Comply)	A container for temporary objects and attachments.
Template	Contract language templates available in the system. These templates specify guidance, language, local settings, and include Word attachment templates representing the bulk of actual contracts that can be used when creating a first draft. Templates can include standard and non-standard language.
Template Datasource Filter	Represents a datasource filter associated with a template.
Term Exception	Represents the Term Exceptions master table.

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