



APTTUS

**Template Administration
X-Author Contracts for
Contract Lifecycle Management**

Housekeeping



Explanation – Demonstration – Participation



4 Hour session with breaks



Access to Materials Through Post-Session Survey

Agenda

- Contract Negotiation Process
 - Where do Templates fit
- Template Administration
 - Within Salesforce
 - Within MS Word
- Creating a Template
 - Formatting and Local
 - 3 types of Merge Fields
 - Smart Attributes
- Using the Playbook
 - Clauses/Sections
 - Conditional Logic



Apttus Quote-to-Cash

Built on the Apttus Intelligent Cloud™



Contract Negotiation Process

APTTUS

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***

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

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

Demo



Template Administration

Template Administrators

What?

- Create new contract templates
- Maintain/Update existing templates

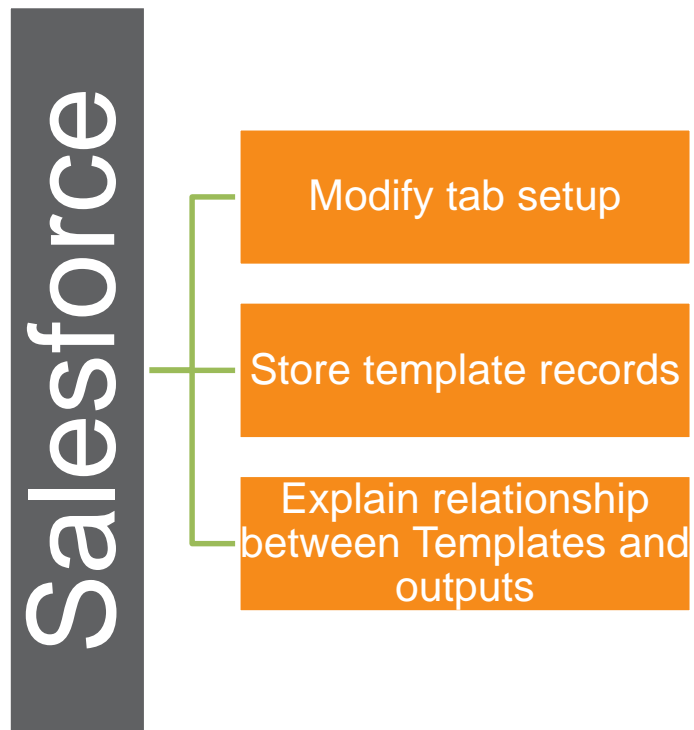
How?

- Fields/Smart Functionality
- Clauses/Clause Library
- Conditional Logic
- Translation

Why?

- Mitigate Risk
- Ensure Compliance
- Streamline Contract Management

Template Administration Within Salesforce



Merge Fields

Basic Merge Fields

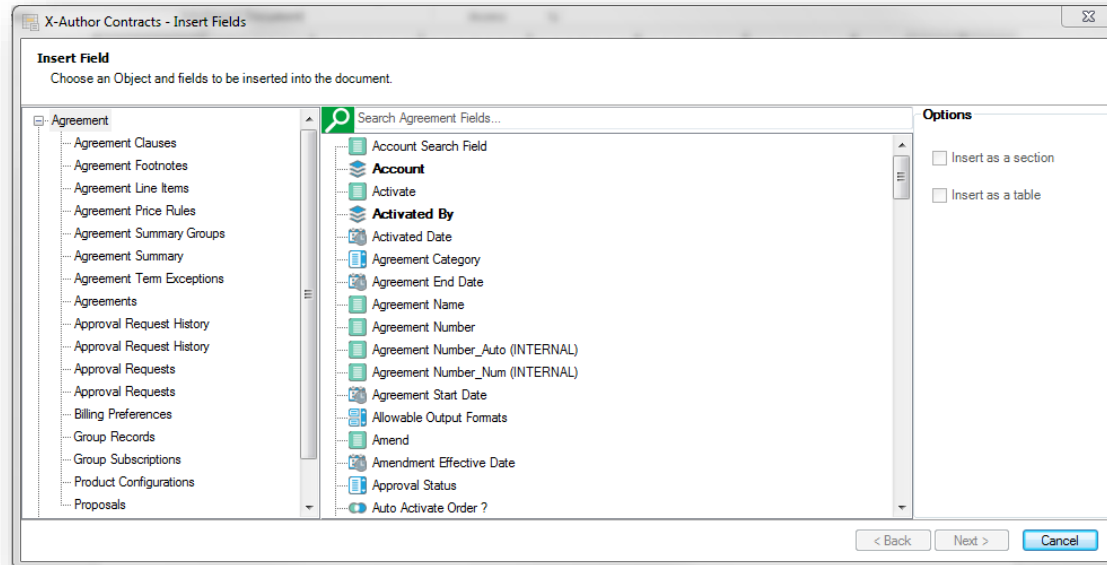
Sections

Table

Formatting

Smart

Conditionality



Check – In

- Specify Record Type
- Language
- Specific Local
- Additional Formatting

X-Author Contracts - Check-In Template

Check-In FX2 Template

Specify the attributes for this template

Type	Agreement	Business Object	Apttus__APTS_Agreement__c
<div><div>*</div>Name</div>	<input type="text" value="MSA - YR"/>	<div>Keywords</div> <input type="text"/>	
<div><div>*</div>Agreement types</div>	<div><div>NDA</div><div>MSA</div><div>Proposal</div><div>RFP</div><div>< </div><div> ></div></div>	<div>Next revision date</div> <input type="text" value="7/24/2017"/>	<input type="text" value="7/24/2017"/>
		<div>Term exception</div> <div>-- Select --</div>	<div>-- Select --</div>
<div><div>*</div>Category</div>	<div>Default</div>	<div>Is Active?</div> <input checked="" type="checkbox"/>	<div><div></div></div>
<div><div>*</div>Subcategory</div>	<div>Default</div>	<div>Description</div> <div><div></div></div>	<div><div></div></div>
<div><div>*</div>Language</div>	<div>English</div>	<div>Guidance</div> <div><div></div></div>	<div><div></div></div>
<div><div>*</div>Locale</div>	<div>English (United States)</div>		
<div><div>Enable Formatting</div></div>	<input checked="" type="checkbox"/>		
<div><div>Date Format</div></div>	<div>M/dd/yyyy</div>		
<div><div>Currency Format</div></div>	<div>Currency Symbol</div>		
<div><div>Number Precision</div></div>	<div>0</div>		
<div><div>Currency Precision</div></div>	<div>2</div>		

*

 = Required Information

Check-In

Cancel

Using the Playbook

Clauses

When

- Same language in multiple templates
- Activity log for audit purposes

How

- Insert from Playbook
- Apply conditional logic

Playbook

Type a Name, Description or Keyword and click the Search icon.

[Show Filter](#)Page #: 1 out of 2
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Templates

Action	Name	Guidance
<input type="button" value="Insert"/>	Americas	
<input type="button" value="Insert"/>	APAC	
<input type="button" value="Insert"/>	Corporate	
<input type="button" value="Insert"/>	EMEA	
<input type="button" value="Insert"/>	Governing Law FX2	
<input type="button" value="Insert"/>	Master Labor Agreement	
<input type="button" value="Insert"/>	Master Sales and Service Agreement	
<input type="button" value="Insert"/>	Master Transaction Agreement	
<input type="button" value="Insert"/>	Obligations	
<input type="button" value="Insert"/>	Procurement	

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Conditional Logic

- Displays text when condition is satisfied

Properties

Attributes

Mark as Smart?	True
Name	Governing Law FX2
Type	Clause (Inline)

Condition

Conditional Expression

Conditional Expression
The conditional expression which displays the field



X-Author Contracts - Make Conditional

Make Conditional
Build expression to make selection conditionally shown.

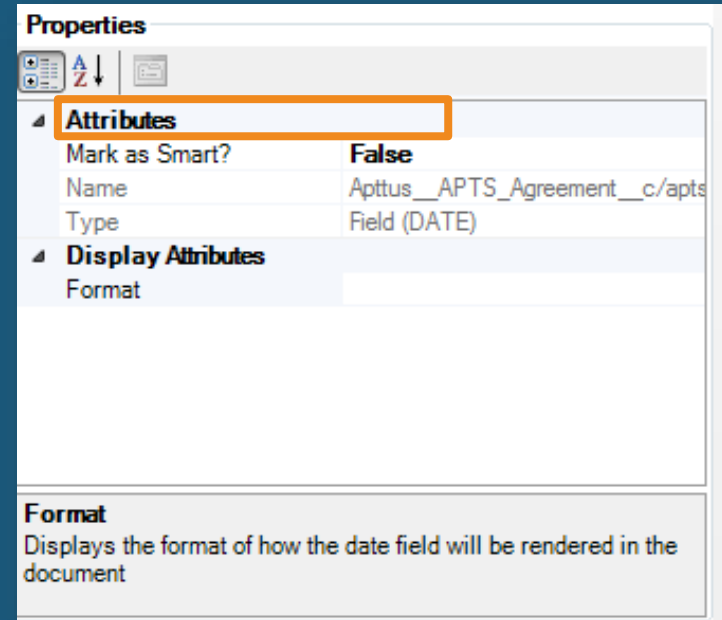
1. Billing Country equals United States

[Add Row](#) [Clear All](#) [Add Filter Logic](#)

< Back Finish Cancel

Smart Fields

- Enables changes in Generated document to reflect in Salesforce
- Placed in either Template or Document
- Utilizes Reconciliation process



Smart Clauses

- Tracks redlines made to Smart Clauses in Agreement Clauses related list
- Available Actions:
 - Original
 - Inserted
 - Modified
 - Deleted

[illegible]

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- 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, high-angle photograph of a city skyline at night. The city is densely packed with skyscrapers and buildings, many of which are illuminated with lights. A prominent circular building is visible in the lower center. The image is overlaid with a semi-transparent blue rectangular band across the middle, which contains the text "Thanks for joining" in white. The background shows a mix of urban development and some open spaces, with a body of water visible in the distance.

Thanks for joining