

APTTUS

Wizard April 2016 User Guide


02 May, 2016

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
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Use the Apttus Wizard to run user-friendly Wizards based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.) These Wizards are intended to be used by sales representatives, purchasing agents, HR managers and other users to quickly complete surveys or create their own records by entering responses to criteria-based inputs that follow a logical series of steps. Wizards can also be used to collect data from customers to be posted to internal systems or for other business use.

Use the **Wizards** tab to run Wizards from existing the Wizard Designs. You can easily search and select from Wizard designs to create well-formed records. Wizards also contain a feature which allows users to review their responses prior to submission, returning to previous steps to make changes or corrections. Users can also use the tab to resume completion of in-progress Wizards or review completed or aborted Wizards.


Configure - Quote - Contract

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+



Wizards Home

Create New Wizard From Design


Wizard Design Create Basic Agreement ▼

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1		11/16/2015 11:58 AM
Review	Agreement Wizard 1	Submitted	Agreement Wizard 1		11/16/2015 11:58 AM
Review	Basic New Agreement	Submitted	Basic New Agreement		11/17/2015 12:09 PM
Review	Basic New Agreement	Submitted	Basic New Agreement		11/16/2015 2:49 PM
Continue	Basic New Agreement	In Progress	Basic New Agreement		11/17/2015 12:08 PM
Review	Create Basic Agreement	Aborted	Create Basic Agreement		11/19/2015 6:31 PM


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For information on creating Wizards using the Wizard designer, refer to the [Apttus Wizard Administrator Guide](#).

Running Wizards

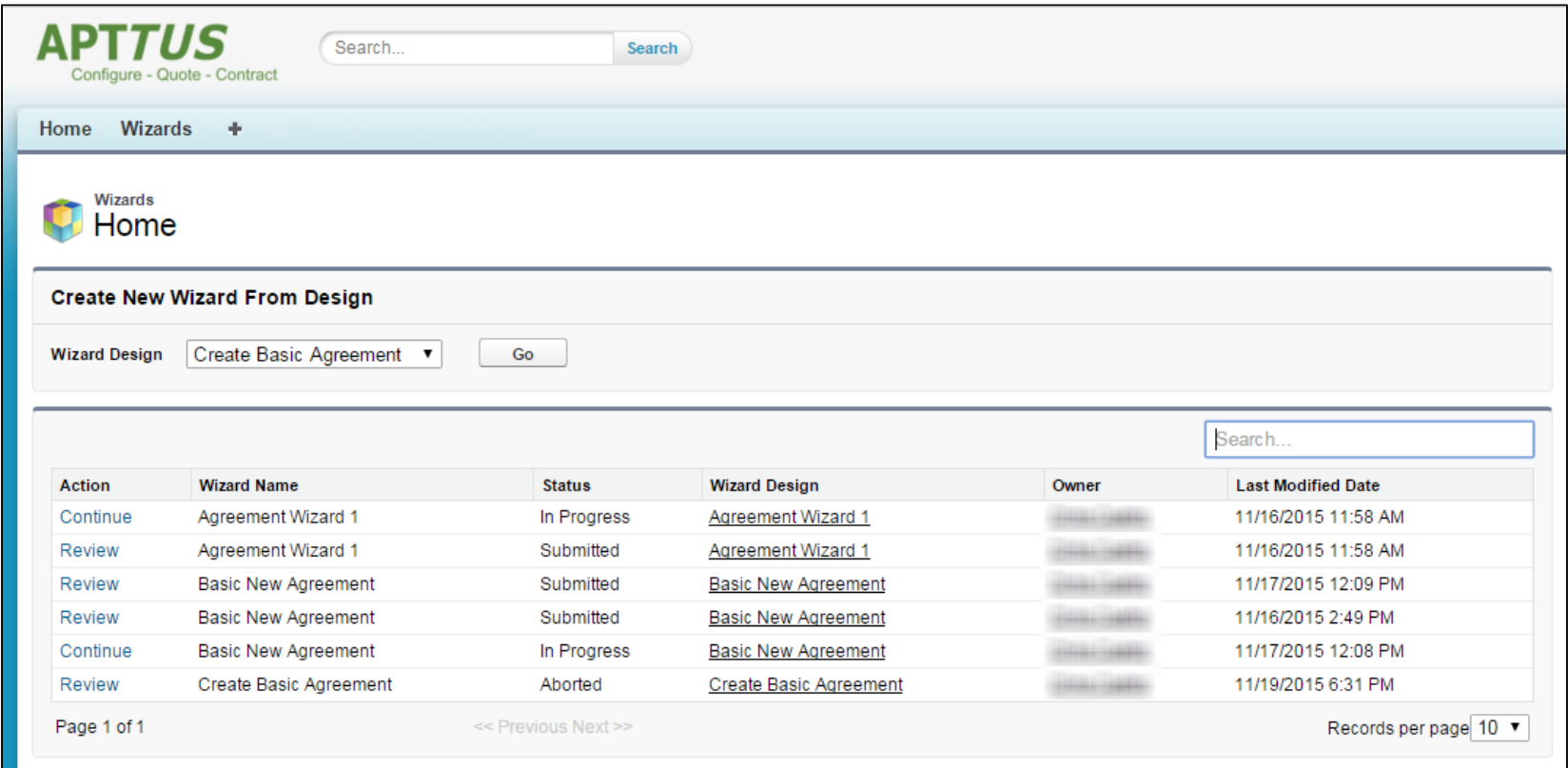
 Hint: click on an image on this page to enlarge the view.

The **Apttus Wizard** application allows you to run Wizards created by administrators. Wizards are custom, user-friendly step-by-step questionnaires that allow you to submit data or create records based on any standard or custom Salesforce object (Agreements, Accounts, Proposals, Leads, etc.). You can quickly complete runtime Wizards by entering responses to criteria-based inputs that follow a logical series of steps. You can easily search and select from Wizard designs to create well-formed records, and if enabled, you can preview your responses prior to submission, returning to previous Inputs and Steps to make changes or corrections.

 Most applications integrated with Wizard will not make use of this tab for running Wizards and will instead permit you to run a Wizard through a link, button or custom tab that is part of the integrated application. The following instructions use the tab as the launching point, but only as a generic point of entry to demonstrate how runtime Wizards work.

To run a Wizard

1. From the Salesforce application menu, choose **Apttus Wizard**. The application displays the Home tab and the **Wizards** tab (you will see additional tabs if you have permissions to create Wizards).




2. Choose a Wizard to run from the drop-down list of designs and click **Go**. Note: Wizards associated with deactivated or retired Wizard designs will not be available in this list.

APTUS
Configure - Quote - Contract

Search...

Home Wizard Designs Wizard Component Library Wizards +








 **Wizards Home**

Create New Wizard From Design

Wizard Design Create Sales Contract ▼

- Create Sales Contract
- Create Basic Agreement
- Basic New Agreement
- Agreement Wizard 1

Search...


Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	Create Sales Contract	In Progress	Create Sales Contract		11/19/2015 8:00 PM
Review	Create Basic Agreement	Aborted	Create Basic Agreement		11/19/2015 6:31 PM
Review	Basic New Agreement	Submitted	Basic New Agreement		11/17/2015 12:09 PM
Continue	Basic New Agreement	In Progress	Basic New Agreement		11/17/2015 12:08 PM
Review	Basic New Agreement	Submitted	Basic New Agreement		11/16/2015 2:49 PM
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1		11/16/2015 11:58 AM
Review	Agreement Wizard 1	Submitted	Agreement Wizard 1		11/16/2015 11:58 AM


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 Ensure that you have not blocked pop-ups in your browser because new Wizards are always launched in a separate tab.

3. **(Optional)** Click the pencil icon in the banner to give your Wizard a unique name, so you can differentiate it from other Wizards you run using the same Wizard design.

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A - Business Wizard 1 


1. Identify Your Business Function 


What business function do you want to work with? 

-- Select One --

APT
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My First Sales Contract  

1. Identify Your Business Function 


What business function do you want to work with? 

-- Select One --

The new name for your Wizard is shown in the list of In Progress and Submitted Wizards on the Wizards tab.

Create New Wizard From Design

Wizard Design

A - Business Wizard 1 

Go

Action	Wizard Name	Status	Wizard Design
Continue	My First Sales Contract	In Progress	A - Business Wizard 1
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Continue	Wizard Survey Demo	In Progress	Wizard Survey Demo
Review	Wizard NotesAttachments Demo	Submitted	Wizard NotesAttachments Demo
Continue	Wizard Customization Demo	In Progress	Wizard Customization Demo

4. Move through the steps of the Wizard, choosing values for the fields in each step. Click **Next** to move to the next step in the Wizard or click **Steps** to navigate using the Preview Sidebar.

CC Business Wizard

Next

STEPS

1. Identify Your Business Function

What business function do you want to work with?

-- Select One --

When you choose options (or a combination of options) that result in the creation of an object record, the Object name or Record Type will be displayed immediately upon choosing the option(s). For example, in the following step, when you choose "Sales Contract" as the business activity and "Create" as the transaction type, the Wizard evaluates a condition that determines that an Agreement record will be created when the Wizard is submitted.

CC Business Wizard

BackNext

STEPS

2. Identify Your Sales Business Activity

What type of business activity do you wish to work with?

☐ Sales Quote


☒ Sales Contract

☐ Sales Order

What type of transaction do you wish to perform?

☒ Create

☐ Request



Creates Agreement.

In a later step a Record Type of the Agreement object is created.

CC Business Wizard

BackNext

STEPS

5. Identify Your Desired Types of Sales Items

What is to be sold in this sales contract?

☐ Products

☐ One-Time Services

☐ Subscriptions

☒ All

What is the type of sales contract you want to create?

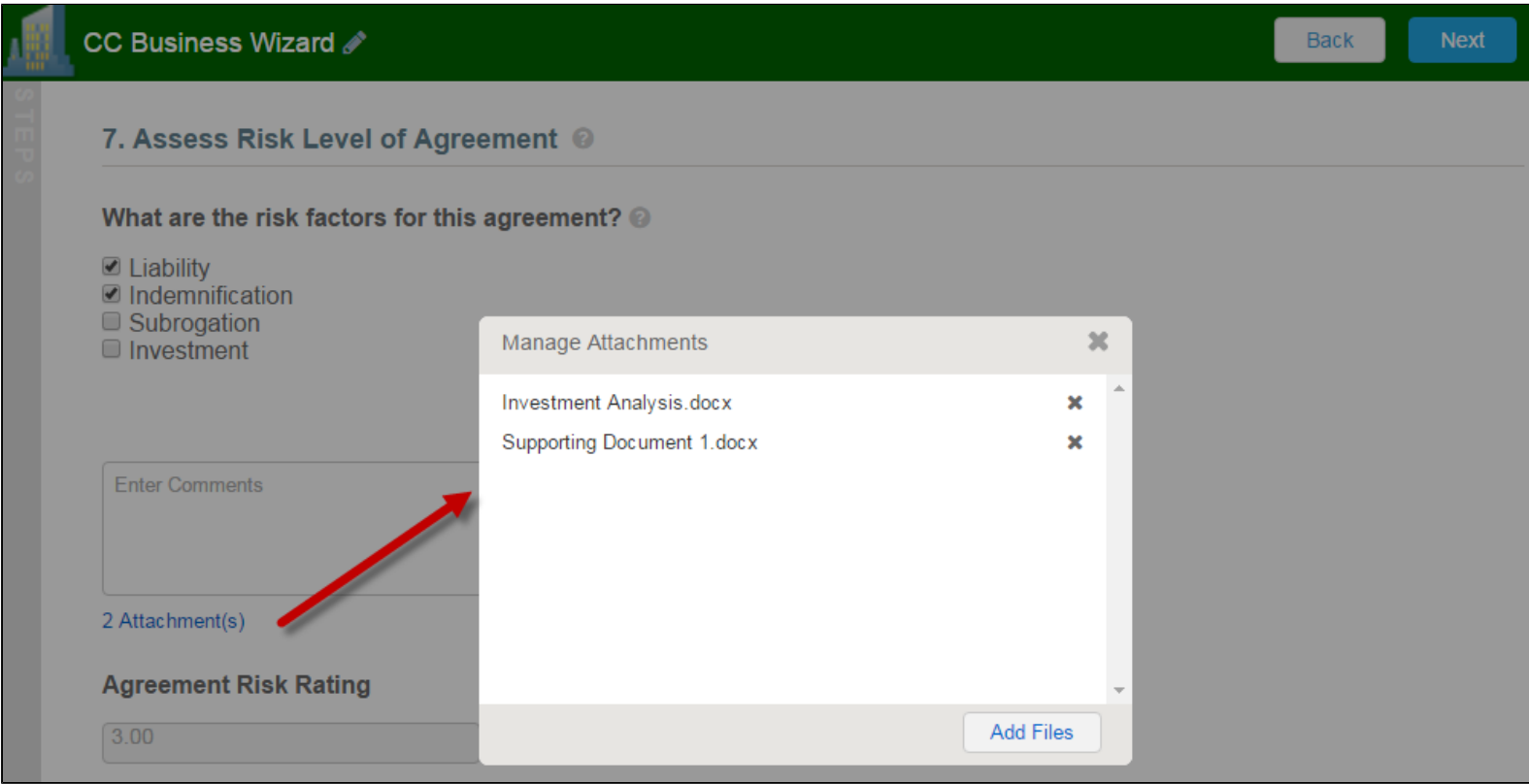
☒ Full Contract

☐ Bundles Contract

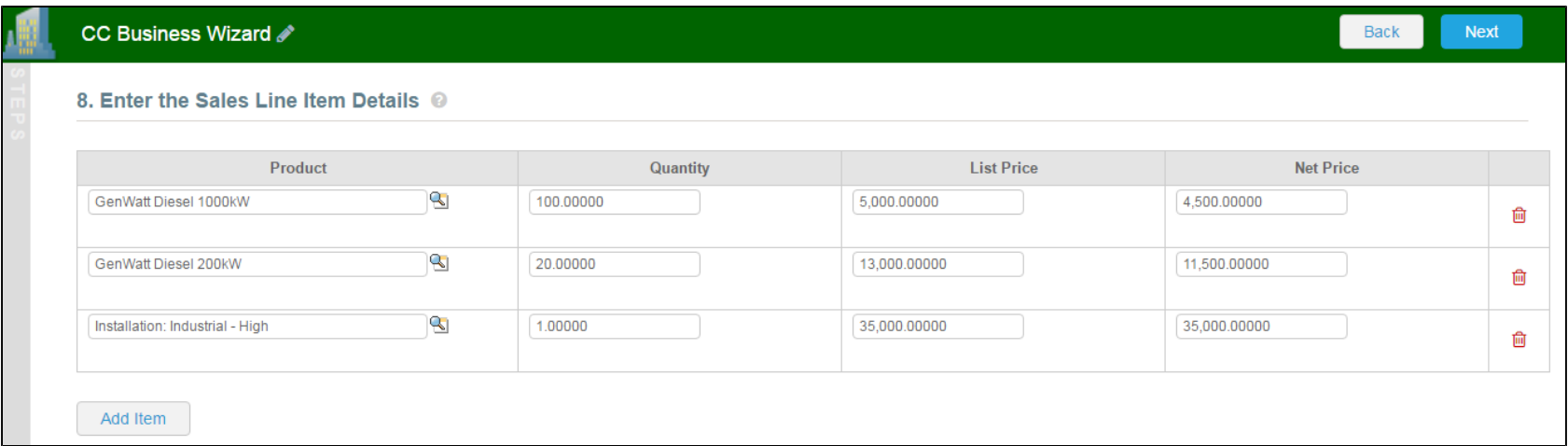
☐ Promotion Contract

Creates Agreement of type SOW.

5. Some Wizard steps may include the option to add comments and/or attachments in addition to providing traditional responses. You can add comments in the text area provided (500 character limit), and/or click **Attach Files** to attach files to the Wizard step. When you use the Wizard to create a record, the attached files are added to the Notes & Attachments Related List of the new record along with the recorded comments. To add an attachment:
- a. Click the **Attachment(s)** link below the Comments box. The Manage Attachments window is displayed.
 - b. Click **Add Files**. Browse for a file on your machine and add it as an attachment. The attachment uploads to the Wizard and displays in the Manage Attachments window.
 - c. Repeat the previous step for each attachment you want to add. Close the window when you are finished adding attachments.



6. Click **Add Item** when there is a repeatable field in the Wizard. These fields are used when you need to enter multiple values as certain responses, for example when you are adding multiple business addresses, or product line items and prices to a Sales Contract, as shown in the example below.



7. Closing the Wizard automatically saves your progress in the Wizard up to the current step. You can continue where you left off from the **Wizards** tab (see [Working with the Wizards Tab](#)).

8. When you have answered the final question in the Wizard and clicked **Next**, the page will display a Review of all steps you have completed.

CC Business Wizard

BackSubmit

12345

Review the Information.

Identify Your Business Function

What business function do you want to work with?

Sales

Edit

Identify Your Sales Business Activity

What type of business activity do you wish to work with?

Sales Contract

What type of transaction do you wish to perform?

Create

Edit

Identify Your Customer Account

What is the customer account?

Partner Technologies

Please check if there already a Master agreement for this account.

☒

Edit

Provide Contract Details

What is the Master Agreement's Number?

a016100000610e

What is the date the agreement term will start?

2016-04-22 00:00:00

What is the date the agreement term will end?

2017-04-30 00:00:00

Edit

Identify Your Desired Types of Sales Items

What is to be sold in this sales contract?

All

What is the type of sales contract you want to create?

Full Contract

Edit

Define Your Preferred Service Level

Do you wish to extend the level of services beyond the base level?

Standard Service Level

This is the service level which we will provide based on your preferences.

Standard

Edit

Assess Risk Level of Agreement

What are the risk factors for this agreement?

Liability:Indemnification

See attached papers for risk assessment action items.

2 Attachment(s)

Agreement Risk Rating


3

Edit

Enter the Sales Line Item Details

Product	Quantity	List Price	Net Price
GenWatt Diesel 1000kW	100.00000	\$5,000.00000	\$4,500.00000

9. Click **Edit** to change your answers for any steps in the Wizard. A dialog is displayed warning that you may have to repeat steps of the Wizard that you previously completed depending on edits you make.

 Editing Steps could result in subsequent step data becoming invalid. If this happens you need to complete them again.

Ok

Cancel

10. Click **OK** to edit the step or **Cancel** to return to the Review page.

11. When you are satisfied with your responses, click **Submit**.

Depending on the design of the Wizard, one or more of the following will occur:

- A record of the type determined by your inputs within the Wizard will be created (e.g., a Sales Agreement record).
- You will be redirected to the record details page of the record just created by the Wizard.
- You will be redirected to another page in Salesforce.
- You will remain on the Review page and the Wizard will be shown as **Submitted** (in this case data from the Wizard has usually been submitted for purposes other than creating a record).

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A - Business Wizard 1

Submitted

Following Information was submitted in this Wizard.

Identify Your Business Function

What business function do you want to work with?
Sales

Identify Your Sales Business Activity

What type of business activity do you wish to work with?
Sales Contract

What type of transaction do you wish to perform?
Create

Identify Your Customer Account

What is the customer account?
Partner Technologies

Please check here if there is already a Master Agreement for this Account.
☒

Provide Contract Details

What is the Master Agreement's Number?
AD Sales SOW 1.29.16.1

What is the date the agreement term will start?
2016-02-18 00:00:00

What is the date the agreement term will end?
2017-02-28 00:00:00

Identify Your Desired Types of Sales Items

What is to be sold in this sales contract?
All

What is the type of sales contract you want to create?
Full Contract

Define Your Preferred Service Level

Do you wish to extend the level of services beyond the base level?
Extended Service Level

How many days of service coverage do you want?
6 days - ext 1

Enter your desired hours of coverage.
12 Hours - 8 am to 8 pm Eastern

What is the maximum expected initial response time for your service cases?
08 Hours

What is the maximum time in coverage days for the solution to be provided?
06 days

This is the service level which we will provide based on your preferences.
Premier

Enter the Sales Line Item Details

Product	Quantity	List Price	Net Price
GenWatt Diesel 1000kW	10.00000	\$5,000.00000	\$4,500.00000
GenWatt Diesel 200kW	20.00000	\$2,500.00000	\$2,000.00000
Installation: Industrial - Medium	1.00000	\$25,000.00000	\$20,000.00000

12. Return to the **Wizards** tab. The Wizard you created and executed now shows its **Status** as Submitted in the list of Wizards.

Wizard Design Agreement Wizard 1 Go

Search...

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Review	CC Business Wizard	Submitted	CC Business Wizard		4/22/2016 3:35 PM
Review	CC Business Wizard	Submitted	CC Business Wizard		4/22/2016 1:03 PM
Continue	CC Business Wizard	In Progress	CC Business Wizard		4/22/2016 12:23 PM
Continue	CC Business Wizard	In Progress	CC Business Wizard		4/21/2016 3:52 PM
Continue	Agreement Wizard 1	In Progress	Agreement Wizard 1		4/21/2016 3:05 PM
Continue	Sample Agreement Wizard	In Progress	Sample Agreement Wizard		4/8/2016 12:54 PM

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Working with the Wizard Tab

You can take several actions from the Wizards tab in addition to creating and running new Wizards:

To search for Wizards

Perform a type-ahead **Search** to locate an In Progress, Submitted or Aborted Wizard in the table.

APTUS

Configure - Quote - Contract

Search...

Search

Home

Wizard Designs

Wizard Component Library

Wizards

+

Wizards

Home

Create New Wizard From Design

Wizard Design

Test Hide Show

Go

Enter search terms to display a list of matching Wizards

Business

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Aborted	A - Business Wizard 1	Charles Nelson	11/24/2015 12:45 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 1:36 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/23/2015 10:32 AM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 9:29 AM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Ramananda Ramachandra	11/23/2015 9:26 AM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Ramananda Ramachandra	11/22/2015 10:14 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/20/2015 6:24 PM

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To continue an In Progress Wizard

Pick up where you left off to complete an In Progress Wizard.

1. Navigate to the Wizard using the type-ahead feature or page navigation.
2. Click **Continue** under the Action column. The Wizard opens in a new tab at the current step.

Business

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Aborted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM

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Your Business Wizard At Work

7. Enter The Sales Line Item Details

Product

Enter the desired quantity

List Price

Net Price

Add Item

Back Next

i

Note: If "No Action" is available for a Wizard in the list, it means that the Wizard design associated with the runtime Wizard has been retired by your administrator. You can neither initiate nor continue Wizards associated with retired designs.

To review a completed Wizard

You can revisit the Review page for a Submitted or Aborted Wizard after it is complete.

1. Navigate to the Wizard using the type-ahead feature or page navigation
2. Click **Review** under the Action column. The Wizard opens in a new tab and displays the Review page (you can no longer edit any steps).

Business

Action	Wizard Name	Status	Wizard Design	Owner	Last Modified Date
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 3:03 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:44 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Aborted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Continue	A - Business Wizard 1	In Progress	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM
Review	A - Business Wizard 1	Submitted	A - Business Wizard 1	Charles Nelson	11/24/2015 2:19 PM

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Your Business Wizard At Work

Submitted

Following information was submitted in this Wizard.

Identify Your Business Function

What business function do you wish to work in? Purchasing

Identify Your Sales Business Activity

What type of business activity do you wish to work with? Sales Contract

What type of transaction do you wish to perform? Create

Identify Your Customer Account

Tracking Wizard Activity from a Record

When a Wizard results in the creation of an Object record (such as an Agreement), a note is automatically added to the **Notes & Attachments** Related List of the created record identifying which Wizard originated the record.

For example, an Agreement record has been created from a Wizard.

1. From the Agreement record page, scroll to **Notes & Attachments**.

Notes & Attachments			
		New Note	Attach File
		View All	
Action	Type	Title	Last Modified
Edit Del	Note	A - Business Wizard 1 Notes	11/24/2015 2:44 PM

2. Click on the Note **Title** to view Note details.

Note

A - Business Wizard 1 Notes

Note Detail

Edit

Delete

Note Owner

Related To

Private

Title

Body

Created By

[a01A000000NV53](#)

☐

A - Business Wizard 1 Notes


This record was created from Wizard A - Business Wizard 1, Runtime a0wA00000075VwKIAU

11/24/2015 2:44 PM

Edit

Delete

In the **Body** description, note the **Wizard** name that created the record.



The Notes & Attachments Related List must be added to the record layout to view the Wizard notes.

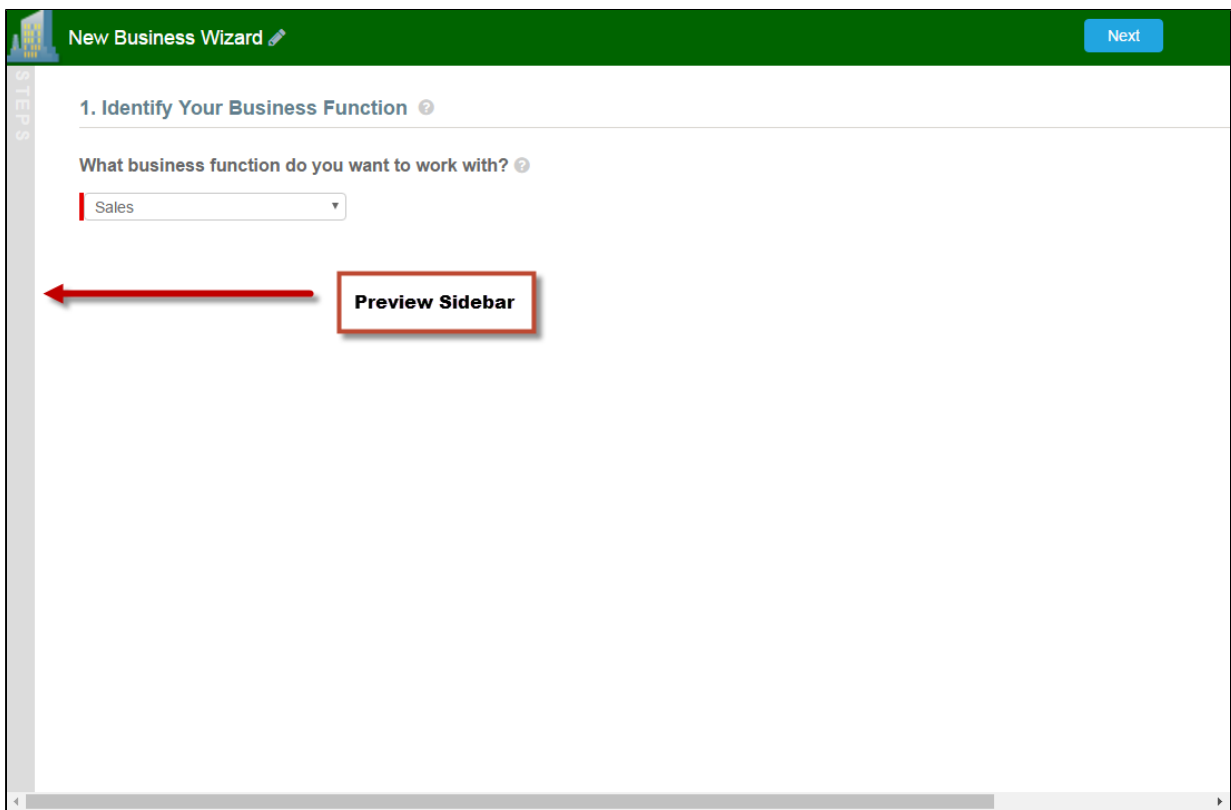
Using the Preview Sidebar

To provide more flexibility when running Wizards, a Wizard user can access the **Preview Sidebar**, which tracks the Wizard as steps are completed. The Wizard user can use the Preview Sidebar to navigate to other steps in the Wizard freely. Use the Preview Sidebar to:

- Preview a future step in the Wizard.
- Track overall completion progress.
- Return to a previous step in the Wizard to complete responses or correct a mistake.
- View a full preview of all completed responses.

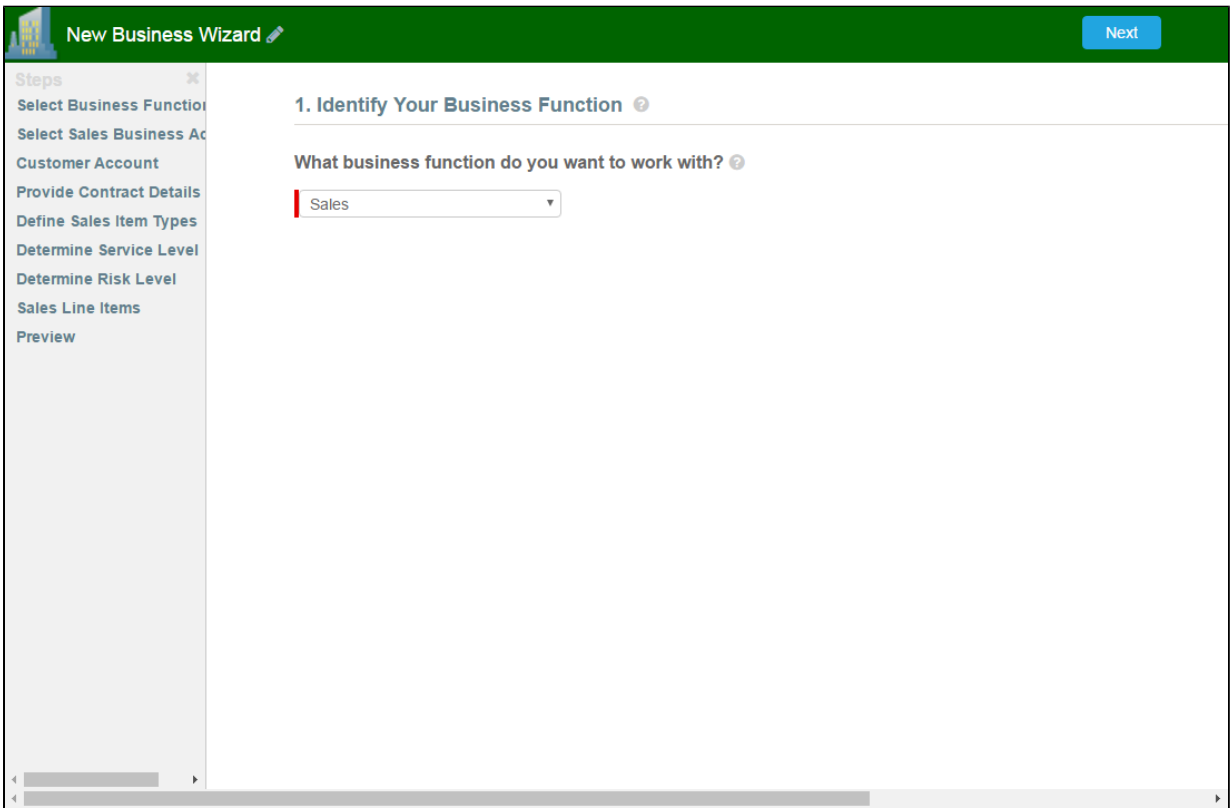
To use the Preview Sidebar

- 1. Launch a new Wizard from the **Wizards** tab. The runtime Wizard is displayed with the Preview Sidebar in collapsed view.

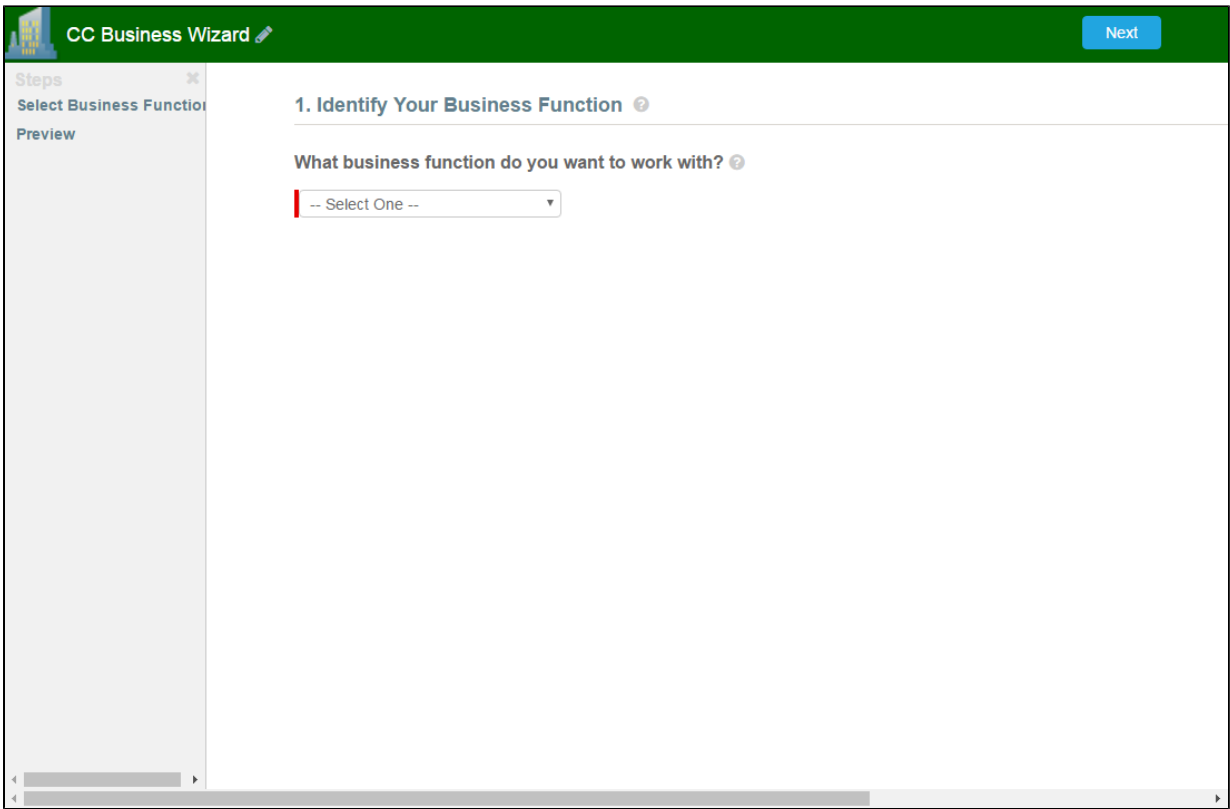


2. Click on the sidebar to expand it. You will see one of two possible views:

- If you are running a linear, step-by-step Wizard with no conditionally-shown steps, you will be able to see and navigate to any step in the Wizard.

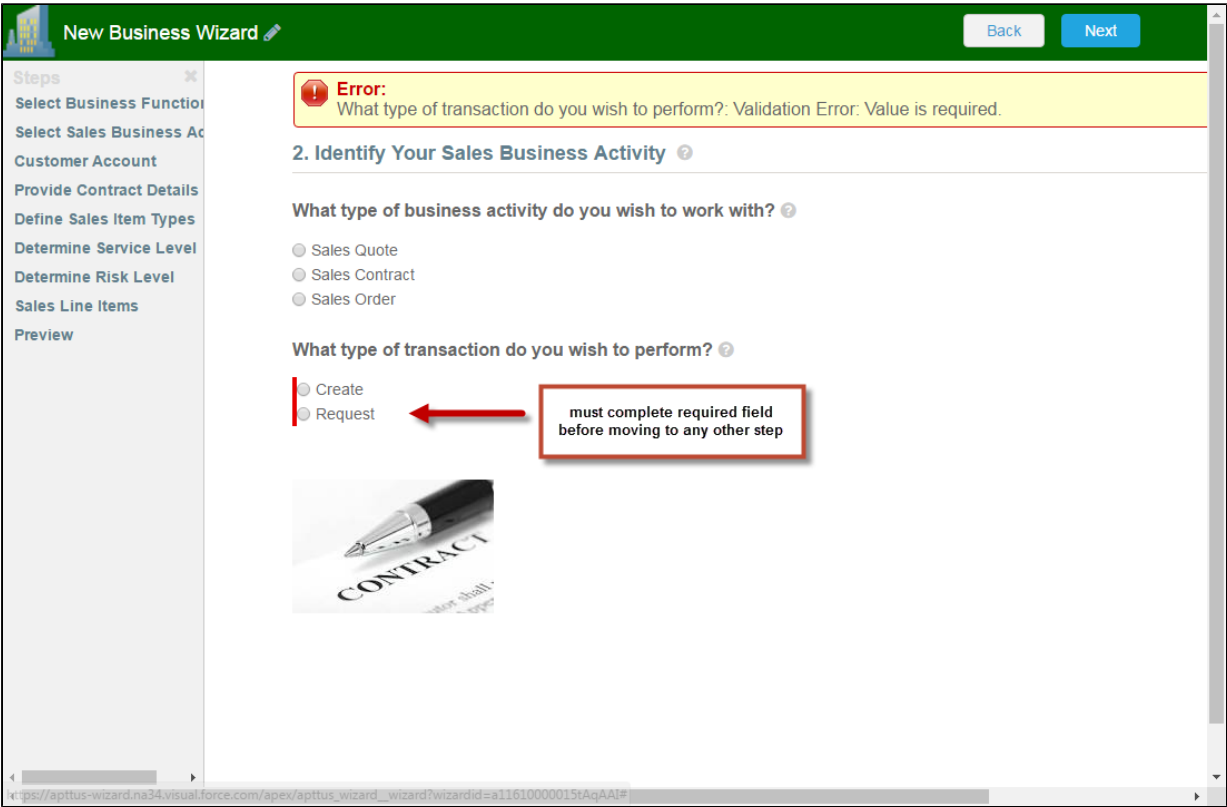


- If the Wizard you are running contains any conditional steps, you will only see the current step and the "Preview" step. The preview sidebar will display additional steps as you complete the current step and conditions are satisfied to include the other steps in the Wizard.

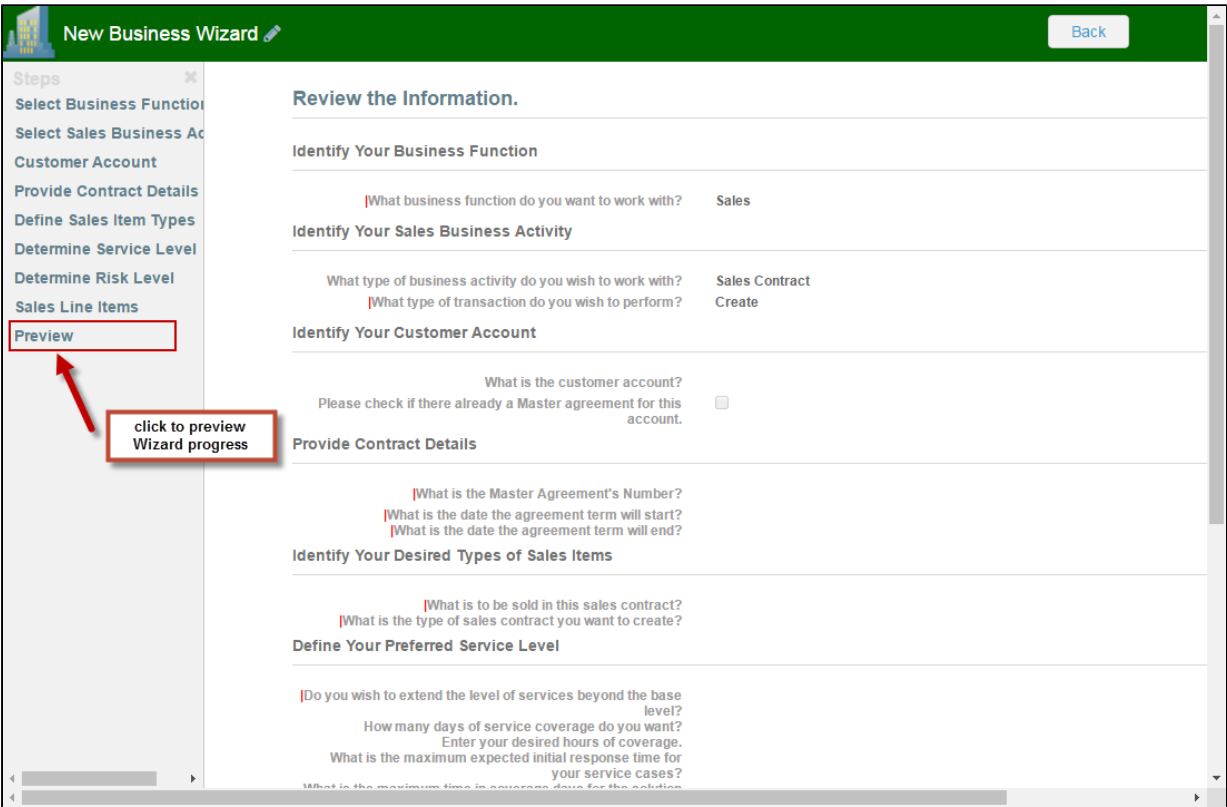


Note: You can click on the X in the upper-right-hand corner of the sidebar at any time to collapse it.

3. Click on any step in the preview sidebar to preview it. **Important Note:** if you attempt to view a future step but the current step contains any required fields, you cannot preview that step until you have completed the required fields in the current step.



4. Click on **Preview** at any time to go to the Review screen where you can review all visible steps in the Wizard, including any completed responses. The Preview screen only reflects steps that are present in the sidebar. No conditional steps will be shown unless the conditions that trigger them are satisfied.



5. Click **Back** to return to the last step you worked with.