Contract Lifecycle Management
Template 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 Template Administrator.

Template Administrators are individuals who are responsible for maintaining and managing agreement and clause templates. These templates contain merge fields which, upon generation, pull in Apttus field values to create distributable documents.

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.

X-Author Contracts is compatible with Microsoft Word 2007, 2010, 2013, and 2016.

Objectives

After completing this course you will be able to:

- Manage connections and functionality between Apttus X-Author Contracts and Salesforce in Microsoft Word.
- Create and check-in/out templates for Apttus Agreements.
- Use and configure merge fields, conditional logic, and clauses in templates.

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

Because templates are used to generate agreement documents, 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 pane, 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 lookup icon, and select the ‘ABC Company’ account from the Lookup dialog window. Enter a **Total Agreement Value** of your choosing. Enter today’s date next to **Agreement Start Date**. Enter “Diego” in the **Primary Contact** field. Click the lookup icon and select ‘Diego Francis’ contact from the popup window.
7	Click **Continue**.
8	Review the fields in the Agreement Edit page. Click **Save.**
Result	You have created a new agreement record. Proceed to the next exercise to add line items to this agreement.

Exercise #2 Add Line Items

Line items are the products and services that are added to an agreement and often reside in a table format in the generated document. In this exercise, you will create line items for your agreement to be used later in this course.

Step	Action
1	With the agreement record open from the previous exercise, scroll to the Agreement Line Items section and click the **New Agreement Line Item** button.
2	Click the magnifying glass icon next to the **Product** field and select any product of your choosing from the Lookup dialog window.
3	Enter **Quantity** and **List Price** (or values of your choosing for the remaining fields) in the pane.
4	Click **Save & New.**
5	Repeat the process to create a second line item and click **Save.** Optionally, have the net price of your two line items add up to the Total Agreement Value.
6	On the first line of the Agreement Line Item Detail page, click the hyperlink next to **Agreement** to return to the agreement record. Verify that your newly created line items appear in the **Agreement Line Items** related list.
Result	The line items are now part of the agreement record and will be available to place in the generated document later.

Templates

Creating and using templates

Templates are Apttus-specific objects in a Salesforce organization that combine static text, such as contractual language, with data from the Salesforce database in order to generate a final document that will be presented to a customer. The merging of data into the template structure is accomplished through the following Apttus technology:

- **Merge Fields**: These fields denote a specific database field that should be brought into the document at the location of the merge field in the template. They can be interspersed with static text in the template so that the final document reads as naturally as a document that was created manually. Additionally, **smart fields** retain the Apttus field definition even after the document is generated so that changes in their values can be reconciled and synced back to the agreement record.
- **Lookup Fields**: Also referred to as "lookups", these fields rely on a connection between related objects in the database in order to bring in data to the template. In relational database terms, it is akin to performing a table join.
- **Clauses**: Modular blocks of text that are used repeatedly. By adding these blocks to a library called a playbook, they can be reused continuously in multiple documents.

Exercise #3 Connect X-Author Contracts to Salesforce

Creating a template requires Apttus-specific functionality that is included in the X-Author Contracts plugin for Microsoft Word. Your instructor can provide you with instructions on installing the X-Author plugin.

In this exercise, you will use your Salesforce login credentials to create a connection from the X-Author Contracts to your Salesforce training org.

Step	Action
1	In Microsoft Word, open a blank document and select the **X-Author Templates** tab.
2	Click the **Connect** button, and choose **Manage Connections**.
3	Enter a name of your choosing in the **Name** field of the **Create a new connection** portion of the dialog window.
4	Enter **https://login.salesforce.com** in the URL field by clicking on the blue hyperlink.
5	Click **Authorize**.
6	In the Salesforce login pop-up window, enter your login credentials.
7	Click the **Log In** button.
Result	You are now logged into Apttus via X-Author Contracts and can proceed working with your templates.

You may have login credentials for separate Salesforce organizations (one for your business' production Salesforce organization, one for training, one for development work, etc.).

When connecting via the X-Author Contracts plugin, make sure that you are using your <u>training org</u> credentials. Also, some internet browser "helper" applications may autofill login fields for you, entering credentials different from your training org’s.

Enabled Formatting and Template Localization

Through Enable Formatting and Template Localization, template administrators can now:

- Specify the **Locale** when creating or cloning a template, or change the locale of a template at check-in. At template creation, admins can choose the Currency Format, Date Format, and configure Number, Currency and Percent precision for the entire template.
- Define the format for **Number, Currency, Date** and **Percent** fields using the Control Panel.
- Preserve the locale for fields in inserted clauses at the template level, while making specific changes to other field formats as needed. Generated documents conform to template locale except where specified at the field level.

Pre-requisites

- Template type selected must be FX2 (and only FX2.)
- *Enable Formatting* must be enabled while creating, checking in or cloning a template, to avail field level locale configuration.
- To use template localization feature, minimum X-Author Contracts version required is **9.0.0111**.
- Template Versioning must not be enabled in Comply System Properties

Combining the above features allows template administrators to use multiple locale formats in templates, while maintaining a default locale and format for subsequent document generation.

Exercise #2 Create a Template

Step	Action
1	Navigate to the X-Author Templates tab in Word and click **New**.
2	Select **Yes** at the prompt to create the template using FX2 formatting. (The ‘No’ option makes the template retroactive to earlier versions of CLM.)
5	Specify the **Locale** as English (United States.)
6	Ensure that the **Enable Formatting** box is checked.
7	Leave Date Formatting as is, ie (M, dd, yyyy)
8	Select **Currency Symbol** as the Currency Format**.**
9	Update both Number and **Currency Precision** to a value of 2.
10	Click **OK**.
Result	The MSA template with formatting and local is created

Exercise #3 Insert Merge Fields into a New Template

Use the following text in your template, which contains placeholders for Salesforce data and static text:

This Master Subscription Agreement ("Agreement") is entered into and effective as of <Start Date> ("Effective Date") by and between ACME, Inc., a Delaware corporation, having its principal place of business at Two Market St, San Francisco, California 94105 ("Company") and <Account Name> ("Customer"), having its principal place of business at <Street>, <City>, <State> <Zip Code> (“Customer Location”).

Step	Action
1	Copy and paste the text above into the Word document.
2	Highlight '<Start Date>' in the text and click the **Insert Fields** button in the ribbon.
3	In the Insert Field window, the left pane contains available objects while the right pane contains the corresponding fields. The Agreement object is already selected. Select **Agreement Start Date** in the right pane.
4	Click **Finish**. The field replaces the highlighted text in the document.
5	Type in a comma and a space after the Agreement Start Date, right before ("Effective Date"), to ensure data is not merged with static text when the template is used to generate a document. **Do this as a best practice when inserting Merge Fields moving forward: always ensure there is a space after a Merge Field.**
6	Highlight '<Account Name>' and click the **Insert Fields** button in the ribbon.
7	Again, the Agreement object is already selected in the left pane. In the right pane, click on **Account**. Notice that Account has a different icon than Agreement Start Date as it is a related object, instead of an Agreement field.
8	Click **Finish**. The inserted field replaces the highlighted text in the document.
9	Click on the **Control Panel** icon if is not already selected. The Control Panel frame opens to the right. Notice that each of the fields is listed in the Navigation pane. Click on each field in the Navigation area and notice the changes in the lower Properties section. The Control Panel contains helpful data related to every field in the template. The fields in the Control Panel will show in the order they appear in the template.
10	Close the Control Panel.
Result	Two merge fields have been inserted into the template so that the agreement start date and account name values from the agreement record will be inserted into the generated document.

Exercise #4 Insert Lookup Fields

In this exercise, you will continue working with the text in the Word document from the previous exercise; you will now insert a lookup field.

Step	Action
1	Highlight the '<Street>' placeholder and click the **Insert Fields** button in the ribbon.
2	We want to insert the billing address of the customer associated with a specific agreement. We will need to pull this data from the Account record which is related to the Agreement.
3	The Agreement object is already selected in the left pane. In the right pane, click once on the **Account** object. This opens up a drop-down list of all of the fields associated with Account. Click on **Billing Street**, then click on **Finish**.

4	Repeat steps 1-4 to insert, in the following order, **Billing City**, **Billing State/Province** and **Billing Zip/Postal Code** into their respective positions in the template. Alternatively, highlight the three placeholder fields in the template, and hold down the Control key while you select the three Account fields in the Insert Fields window. Use your arrow keys and Backspace keys to delete any unnecessary spaces. **Ensure a comma and space after each merge field to avoid overlap or corruption of data.**
Result	Lookup fields have been inserted into the document so that the account billing information will be included in the template.

Exercise #5 Check-In an Agreement Template

Once your template has all the desired text and fields, you will want to check it into the Salesforce template repository in order to test it with an agreement record.

Step	Action
1	In the X-Author Templates tab, click the **Check-In** button and wait for the pop-up window to appear.
2	Since this is a new template, specify a name of your choosing for the **Name** field and append your initials to the end of the name, e.g. "MSA-*yourinitials"*
3	For training purposes, select Default for Category and Subcategory; English for Language and English (United states) for Local.
4	Select MSA from the **Agreement Types** list.
5	Click the **Check-In** button at the bottom of the pop-up window. Wait until the pop-up window indicates the check-in is successful and click **OK.**
Result	Your template is now ready for use in generating agreement documents.

Exercise #6 Cloning a localized template

Step	Action
1	Click the **Clone** icon in the X-Author Templates ribbon.
2	The word "Copy" is appended to the name of the template. Replace the word Copy with "British"
5	Change the **Locale** to English (United Kingdom)
6	Click **Clone** and **OK** to check in the new template. Close all instances of MSWord. Since your Agreement Template is now safely checked into Salesforce, you may ignore prompts to save your file locally.
Result	A cloned version with British formatting is checked in and ready for use

Exercise #7 Test the Templates

Once an agreement template has been created and checked in, it is tested by generating an agreement document.

Step	Action
1	Click the **Agreements** tab in Salesforce and open your MSA agreement record.
2	In the Actions section of the agreement record, click the **Preview** button.
3	Select **PDF** as the Document output.
4	Select the radio button next to the "MSA-yourinitials" template and click **Generate**.
5	Click the **'Click here to view this file'** hyperlink to open your file.
6	Open the file in Word to view the results. Keep the PFD open.
7	Return to your MSA record, and click **Preview** again.
8	Select **PDF** as the Document Output, and the "MSA-yourinitials British" template. Click **Generate.**
9	Click the **'Click here to view this file'** hyperlink to open the file.
10	Compare the two PDF files and notice the difference in the dates.
Result	The generated Word documents displays static text interspersed with the field information pulled form the agreement record and in the format specified on the templates.

Exercise #8 Check-Out a Template

Locating an existing template for further edits is an essential task that is easily accomplished using X-Author Contracts.

Step	Action
1	Open Microsoft Word and navigate to the **X-Author Templates** tab.
2	Click **Connect**. Locate and select the username created in Exercise 3.
3	Click the **Check-Out** button. The Checkout pop-up window opens. Click on the **Show Filter** link.
4	Ensure **Agreement** is selected in the Type picklist and click the blue search button.
5	Locate your MSA-*yourinitials* template from the list of search results and click the **Open** button next to it.
Result	The MSA agreement template is open in Word and ready for further editing.

Exercise #9 Insert Line Item Fields

Line item fields have a master-detail relationship with the agreement record in which they are added. They are used to detail the list of products and services included in an agreement. When a line item field is added to an agreement template, it typically is inserted into a table.

Step	Action
1	With your MSA-*yourinitials* template open in Word, position the cursor a few lines below the existing text. You will insert the Line Item table in this location.
2	Select the **Insert Fields** button in the ribbon.
3	From the expanded **Agreement** object in the left pane, select **Agreement Line Items** object.

4	In the right pane, while holding down the Control key, select in order the following fields: **Quantity**, **Product** and **List Price**. The Product field will expand but do not select any fields within Product.
5	Select the checkbox, “Insert as a table,” underneath Options. Click **Finish**. The table is now in the document with columns ordered in the order you selected the fields.
6	Format the table with bold header text that is centered.
7	In the X-Author Templates tab, click the **Check-In** button and wait for the pop-up window to appear.
8	Leave the field values unchanged, and click the **Check-In** button at the bottom of the pop-up window. Wait until the pop-up window indicates the check-in is successful and click **OK.**
9	Return to your Agreement record. Use the preview/generate functionality (as in Exercise #7) to test these changes.
Result	Your template now contains agreement line item field data in the generated document.

Exercise #10 Create a Clause

Clauses are modular blocks of text that are used frequently across multiple templates. Once defined, a template administrator uses the Playbook to insert clauses into templates as static text. Conditional logic can be used to control which clauses are used in a template.

In this exercise, you will add a clause template to the library by typing or copying/pasting the following text in Step 3 below:

Export Controls *Customer acknowledges that the laws and regulations of the United States restrict the export and re-export of commodities and technical data of United States origin, which may include Confidential Information. Customer shall not export or re-export any restricted Confidential Information in any form, without the appropriate United States and foreign governmental licenses and written permission to do so, and Customer shall not under any circumstances export, or allow the export or re-export of restricted Confidential Information or any part thereof, to any person or destination prohibited under the United States Export Administration Regulations or similar statutes or regulations.*

Step	Action
1	Click the **New** button in the X-Author Templates tab.
2	Keep the default setting of “**Yes**” to create the template. Change the **Type** to **Clause** and keep the business object as **Apttus__APTS_Agreement__c**. Click OK.
3	Copy and paste the text above into your template. In the X-Author Templates tab, click the **Check-In** button.
4	Notice in the pop-up window that Type is already set to Clause. Specify a value for the **Name** field, e.g. Export Controls-*yourinitials*.
6	For training purposes, select Default for Category and Subcategory; English for Language and English (United states) for Local.
7	Select MSA as the agreement type from the **Agreement Types** list.
8	Click the **Check-In** button at the bottom of the pop-up window. Wait until the pop-up window indicates the check-in is successful and click **OK.**
9	You can now close your clause template. Since your clause template is now safely checked into Salesforce, you may ignore prompts to save your file locally.

Result	Your clause is now checked into the Apttus library and is ready for inclusion in templates or as an alternate clause in a generated document.

Exercise #11 Use the Playbook

The Playbook helps the template administrator and end users to search for templates, clauses, sections, or other supporting documents. In this exercise, you will use the Playbook to locate and insert a clause into your MSA agreement template.

Step	Action
1	Within your MSA agreement template in Word, position the cursor a few lines below the table.
2	Click the **Playbook** button in the X-Author Templates tab. The Playbook opens.
3	Click on the **Show Filter** link. Ensure **Clause** is selected in the Type picklist, then click the blue Search button.
4	Locate your Export Controls clause in the Templates pane and click the **Insert** button to include the text version of the clause. Close the Playbook.
5	**Check-In** your agreement template. Wait until the pop-up window indicates the check-in is successful and click **OK.**
Result	You have inserted the Export Controls clause into the MSA template.

Exercise #12 Apply Conditional Logic

Conditional logic allows the document to be customized based on the evaluation of a logical condition. For example, if a condition evaluates to be true, then display a field value. In this exercise, you will construct a logical condition and then let the evaluation of the condition determine whether the field value is shown.

Step	Action
1	Within your MSA template in Word, click the **Control Panel** icon.
2	Click within the Export Controls clause you inserted in the previous exercise. (Alternately, click Clause Inline (ExportControls) in the Control Panel Navigation pane.
3	In the **Properties** area, click the rectangle just to the right of **Conditional Expression**, then click the rectangle containing the three dot ellipse or right-click Clause Inline (ExportControls) in the Control Panel and select “Edit condition.” This opens the Expression Builder pop-up window.
4	Select the left picklist in the pop-up window and select **Agreement**.
5	Click on the build button to the right of the Agreement selection. This launches the **Choose Lookup Field** pop-up window.
6	Select the **Account** object in the left pane and the **Region** field in the right pane.
7	Click **OK**.
8	Retain the **equals** value in the middle picklist.
9	Click on the right-most build button. This launches a pop-up window showing the values of the **Account** object’s **Region** field.
10	Add **EMEA** to the right column and click OK.

11	Click on **Finish**. Check in your template and test the condition, by changing the Account region to EMEA and previewing the document.
Result	If the specified region of the account associated to the test MSA agreement is EMEA, the Export Controls clause text will display; otherwise, it will not.

Exercise #13 Publish a Clause

The language in a clause template need not be static. When the clause language changes, it's necessary to then update agreement templates, or other clause templates, that reference the revised clause. This process of updating is called Publishing.

Step	Action
1	Open your **Export Controls** clause by clicking the **Check Out** icon in the X-Author Templates ribbon. Do this by clicking the Show Filter link to change Type from **Agreement** to **Clause**.
2	Add the following text to the end of your Export Controls clause: "This language is subject to change without notice."
3	Click **Check-In**. The Check In window has changed. The following language and a checkbox now appear at the bottom of the prompt: Publish all clause and agreement templates affected by this clause template's changes.
4	Check this box. A link appears to view all affected templates that reference this clause.
5	Click the link. This opens another prompt with a link to the template record of your MSA template.
6	Click this link as well to see the template record.
7	Return to the Publish Templates prompt and click the **Close** button.
8	Click **Check In** to continue the check in process.
9	A prompt appears with the message that the Export Controls clause template has checked in but the referenced templates need publishing. Click **OK**.
10	The **Publish Templates** window opens. (Alternately, you could select the Publish icon to open this window.)
11	Notice the two required fields, **Publish User Name** and **Publish User Credentials**. Enter your login information provided earlier by your instructor.
12	Publishing can be performed manually or automatically. We will continue by demonstrating the manual Publish process.
13	Your MSA template appears in the Templates section. Select the checkbox next to your template.
14	Click the **Publish** button. This launches the **TemplatePublishJob** batch job.
15	Confirm that the batch job is complete then close the **Publish Templates** window.
16	Finally, confirm that your MSA agreement template contains the updated Export Controls clause language by checking out your MSA Agreement template. (If you don't see the updated language, you may need to close your MSA template and check it out again.)

Result	You have successfully published an updated clause template.

The Auto Publishing feature will update all higher level parent clause templates as well as the main agreement template affected by the changes in a 2nd or lower level child template. The net effect of using both the Refresh and Auto Publishing features is that document generation uses the current template contents and produces much faster generation speeds, as the publishing task is already done prior to generation.

Exercise #14 Insert Smart fields

Smart fields allow changes to a field value in the generated document to be tracked and reconciled back to the agreement record in Salesforce, changes can be accepted or rejected; only accepted changes will be synced back to Salesforce. This is critical when a generated agreement document is received by an external party, who makes changes to or "redlines" terms. In this exercise, you will add a smart field to your agreement template.

For this exercise, type or copy/paste the following text: *This agreement will be considered void on <end date>*

Step	Action
1	Open your MSA template in Word, and copy and paste the above text a few lines below your clause.
2	Highlight the <end date> section of the text, and click the **Insert Fields** button in the ribbon.
3	The **Agreement** object is already selected in the left pane. Select **Agreement End Date** in the right pane. Click on **Finish**.
4	Click the Control Panel icon. Click within the End Date field to highlight it. This brings up the corresponding Properties section in the Control Panel.
5	Click, or double-click, the **Mark as Smart** attribute and change its value from **False** to **True**.
6	Check in your template.
Result	Your template is updated with a smart field that can be reconciled with agreement records in Salesforce. In the next exercises, you will generate an agreement document with this template and test the smart field reconciliation.

Exercise #15 Adding Merge Fields to a Clause

Utilizing X-Author functionality, we can add merge fields to clauses to bring in data from the agreement record. In this exercise, we will edit the Governing Law clause.

Step	Action
1	Click the **Check-Out** icon from the X-Author Templates tab.
2	Click the **Show Filter** link, and in the **Type** picklist, select **Clause**. Then, click the blue search button.

3	Click the **Open** button next to the **Governing Law** clause to open the clause template.
4	Using the Insert Fields function, insert the Agreement Start Date and Account fields into <Start Date> and <Account>. Referring to exercise 14, make the Start Date Smart.
5	Check in the template to save the changes.
Result	You have now inserted a smart field and standard merge field into the Governing Law clause.

Exercise #16 Turn a Static Clause into a Smart Clause

Like smart fields, smart clauses can be reconciled across documents during check-in. In this exercise, you will turn a static text clause into a smart clause.

Smart clauses will help with reconciliation during contract negotiations.

Step	Action
1	Open your MSA agreement template in Word.
2	As you did in Exercise 12**,** use the **Playbook** to insert the **Governing Law** clause into a new area of your template. Close the Playbook.
3	Click **Control Panel** at the top of the ribbon (this shows all of the clauses and fields).
4	Right-click the **Governing Law** clause within the **Control** Panel and select **Mark as smart.**
5	**Check In** your agreement template, and after seeing the verification pop-up, close Word. Ignore any prompts to save the file locally.
6	Return to the MSA agreement record you have been using throughout the exercises.
7	In the **Actions** section of the record, click the **Regenerate** button, and choose **DOCX** as the output format.
8	Select the MSA template you just checked in and click **Generate**.
9	**Click here to view this file** to open the generated document.
Result	The static text Governing Law clause, now marked as smart, will track any changes for reconciliation upon check-in.

Appendix

Filtering templates

Using template filtering rules, administrators can set up user-defined filters to narrow the list of templates that display for tasks that involve previewing or generating documents, e.g. for agreement templates created for multiple regions, a user should only be able to select templates for the region they belong to. The template filter uses agreement fields and related child object fields to select the templates to display.

The following example uses the 'Language' field value on the template record and compares it with the value of a similar field on the agreement record. Filtering rules are set up in the Query Templates object.

<u>Prerequisite</u>: Template records where Language values differ.

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. This is the specific field label that identifies the record type where template filtering will be used.
9	Retain **Comparison Operator** as 'equal to.'
10	Type the name of the target record type in the value field, which the Query Template will use to identify which records to filter. 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**.
Result	When a specific language is selected on the agreement record, the associated template is automatically used for document generation.

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