

Before You Begin

Did you sign up for a Industries training playground already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time doing the exercises:

1. Sign up for a Industries training playground.
2. Fill out the form.
 - a. For Email, enter an active email address.
 - b. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, yourname@industriestraining.com).
 - c. After you fill out the form, click **Sign me up**. A confirmation message appears.
3. When you receive the activation email (this might take about 30 minutes), open it and click **Verify Account**.
4. Complete your registration by setting your password and security challenge question.
Tip: Write down your username, password, and login URL for easy access later.

You are logged in to your Industries training playground and you can begin practicing.

Exercise 1: Create Web Document Templates

Requirements

“Sophia wants to create an easy to use document template containing predefined clauses and embedded templates.”

Create a web document template with appropriate template sections in the Document Template Designer in Salesforce.

Prerequisites

- None

Tasks

1. Create a clause
2. Create a Web Document template
3. Add Template sections
4. Set template section display conditions
5. Activate the telecom services agreement template

Time: 15 mins



NOTE:

There's a recent change to session settings that affects your experience using LWC OmniScript Designer. After you get your training playground, please make this quick change before beginning exercises.


1. Click Setup (the gear icon) and choose Setup.
2. In the Quick Find, search for and then go to Session Settings.
3. Deselect Use Lightning Web Security for Lightning web components.
4. Clear Chrome cache after changing the setting or do a hard refresh.
 - a. In Chrome, select the three dots on the top right.
 - b. Go to Settings > Security and Privacy > Clear Browsing Data.

For more information, see:

<https://help.salesforce.com/s/articleView?id=000393105&type=1>

Task 1: Create a clause

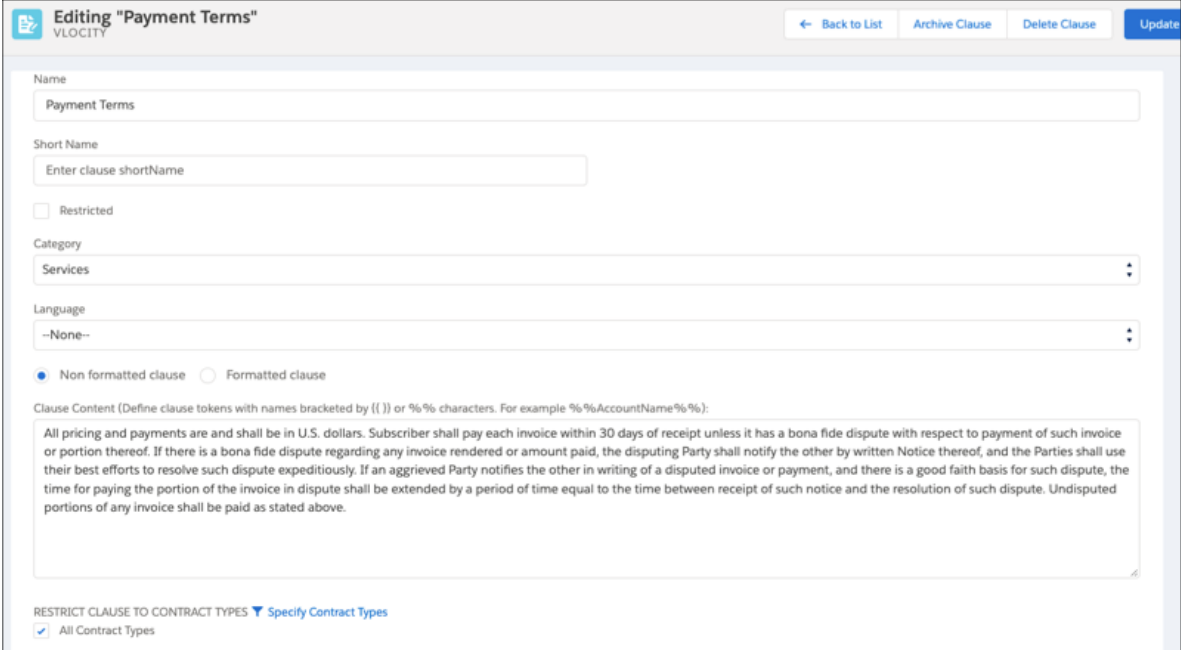
In this task, we'll create a clause that we'll later add to templates.

1. Using the **Lightning App Launcher**  , navigate to **Contract Lifecycle Management (CLM)**.
2. In the **Lightning Navigation bar**, click **Vlocity Document Clauses**. We've added several clauses already.
3. At the top of the page, click **New**.

4. Enter the following information.

Field	Value
Enter clause name	Payment Terms
Restricted	✓
Category	Services
Language	None
Clause Content	All pricing and payments are and shall be in U.S. dollars. Subscriber shall pay each invoice within 30 days of receipt unless it has a bona fide dispute with respect to payment of such invoice or portion thereof. If there is a bona fide dispute regarding any invoice rendered or the amount paid, the disputing Party shall notify the other by written Notice thereof, and the Parties shall use their best efforts to resolve such dispute expeditiously. If an aggrieved Party notifies the other in writing of a disputed invoice or payment, and there is a good faith basis for such dispute, the time for paying the portion of the invoice in dispute shall be extended by a period of time equal to the time between receipt of such notice and the resolution of such dispute. Undisputed portions of any invoice shall be paid as stated above.
Restrict Clause to Contract Types	All Contract Types = ✓

- 5. Click **Save**. The new clause is added to the document clause list. The image below shows the created clause. You'll add this clause to template later.



Editing "Payment Terms"
VLOCITY

← Back to List Archive Clause Delete Clause Update

Name
Payment Terms

Short Name
Enter clause shortName

Restricted

Category
Services

Language
--None--

Non formatted clause Formatted clause

Clause Content (Define clause tokens with names bracketed by { } or %% characters. For example %%AccountName%%):

All pricing and payments are and shall be in U.S. dollars. Subscriber shall pay each invoice within 30 days of receipt unless it has a bona fide dispute with respect to payment of such invoice or portion thereof. If there is a bona fide dispute regarding any invoice rendered or amount paid, the disputing Party shall notify the other by written Notice thereof, and the Parties shall use their best efforts to resolve such dispute expeditiously. If an aggrieved Party notifies the other in writing of a disputed invoice or payment, and there is a good faith basis for such dispute, the time for paying the portion of the invoice in dispute shall be extended by a period of time equal to the time between receipt of such notice and the resolution of such dispute. Undisputed portions of any invoice shall be paid as stated above.

RESTRICT CLAUSE TO CONTRACT TYPES ▼ Specify Contract Types

All Contract Types

Task 2: Create a Web Document Template

1. In the **Lightning Navigation bar**, click **Vlocity Document Template**.
2. Click **New** on the top right section to create a new web document template. The **Start New Template** page opens.
3. In the **Template Settings** section, enter the following information:

Field	Variable Token
Name	Telecom Services Agreement
Template Type	Vlocity Web Template
Language	English
Token Mapping	Object Based
Usage Type	Contract
Applicable Objects	Contract
Applicable Item Types	ContractLineItem__c

4. Click **Save Template Details**.



Start New Template

VERSION 1

[← Back to List](#) [Save Template Details ▲](#)

Template Settings

- Name: **Telecom Services Agreement**
- Template Type: **Vlocity Web Template**
- Language: **English**
- Token Mapping: **Object Based**
- Usage Type: **Contract**
- Applicable Objects:
 - Contract
 - Opportunity
 - Order
 - Quote
- Applicable Item Types:
 - ContractLineItem__c
 - OpportunityLineItem
 - OrderItem
 - QuoteLineItem
- Is Signature Required:
 Signature Required
- PDF Generation Mechanism: **Default**
- Restrict Template to Contract Types [Specify Contract Types](#)
 All Contract Types

Edit Document Default Styling

Default font family for the Document:
Times New Roman

Define the style for each Section Heading Level. Any Level below level 3 will inherit level 3 styling:

SECTION HEADING 1 SECTION HEADING 2 SECTION HEADING 3

Sample Section Heading 1 Text

Font Family: **Times New Roman** Font Size: **18pt** Font Color: **#000000**

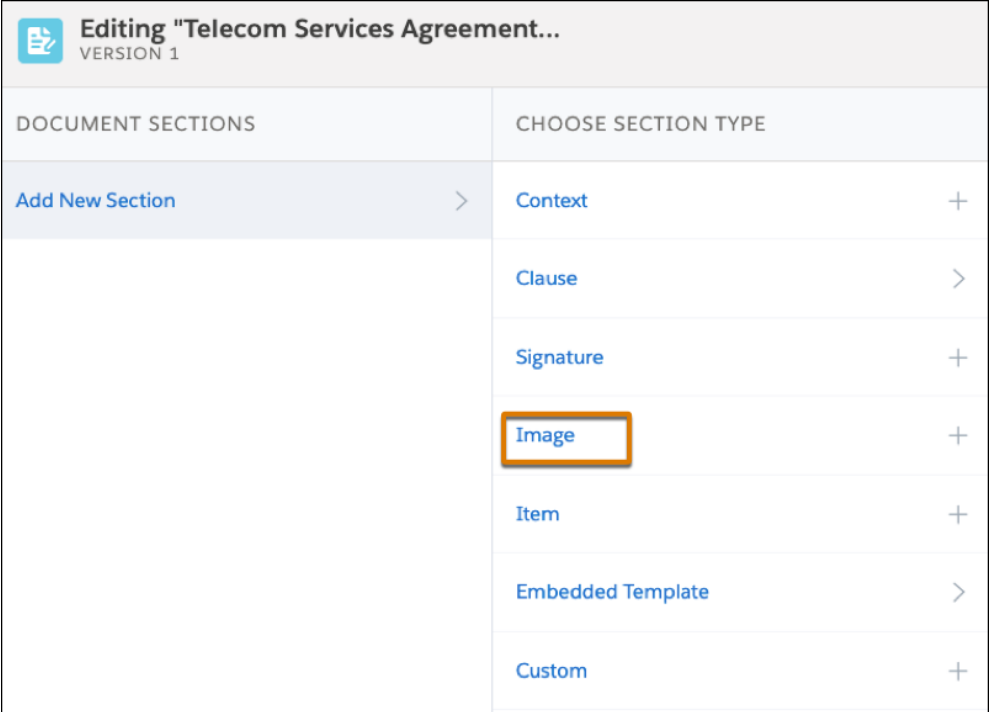
Select all Font Formats to Apply:
 Bold
 Underline
 Italic

Select Text Alignment:
 Left
 Center
 Right

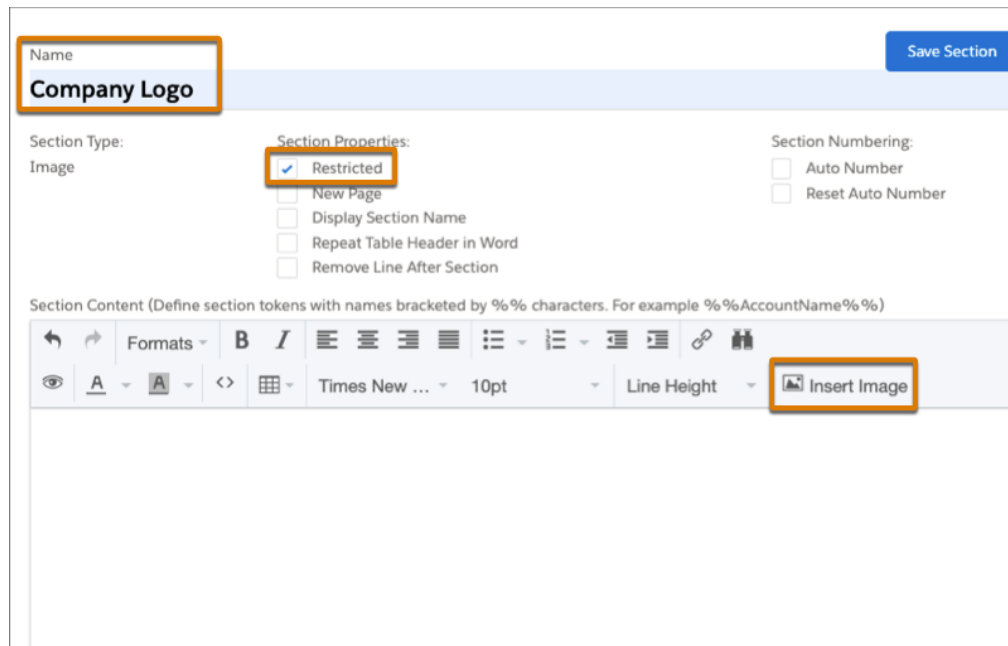
Select Indentation:
None

Task 3: Add template sections

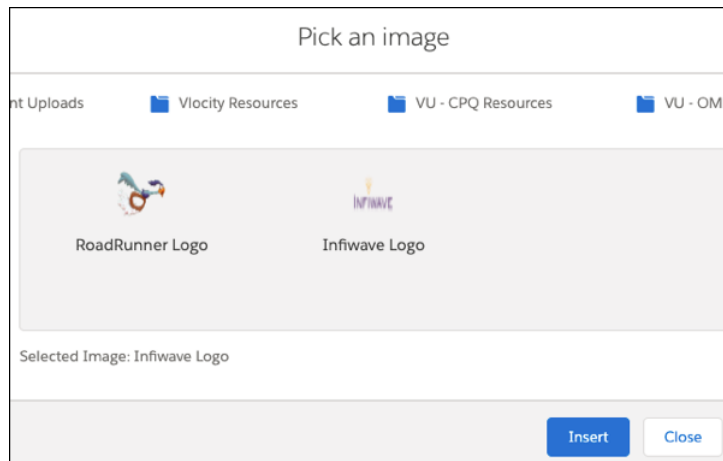
- 1. Add an Image section for your Company Logo:
 - a. Click **Add New Section**, then click **Image**.




- b. Enter `Company Logo` as the section name.
- c. Under Section Properties, select **Restricted**.



- d. In the editing toolbar, click **Insert Image**.
- e. In the **Pick an image** dialog, click the **VU - CPQ Resources** folder and select the **Infiwave Logo**.

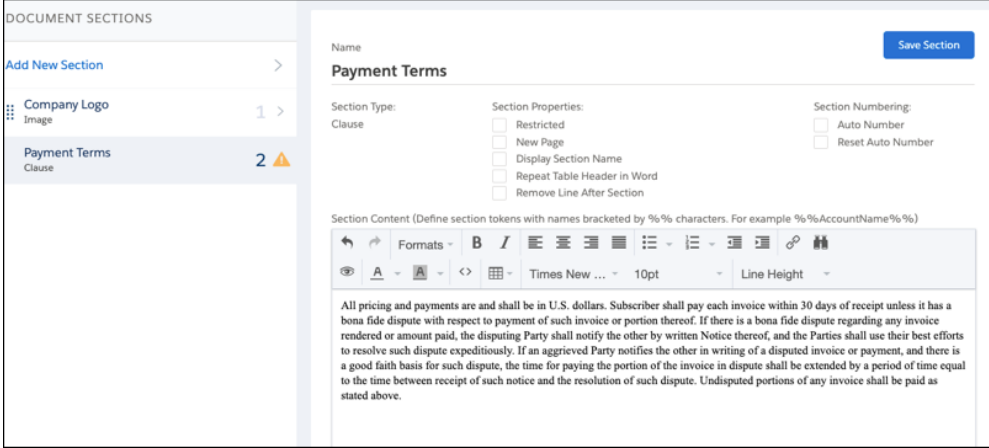


 **NOTE:**
Scroll in the “Pick an image” dialog to locate the “VU – CPQ Resources” folder.

- f. Click **Insert**.
 - g. Click **Save Section**.
2. Add Clause section.
- a. Click **Add New Section**, then select **Clause** as the section type. The list of available clauses is displayed. These are the clauses from the Vlocity Document Clauses page.

DOCUMENT SECTIONS	CHOOSE SECTION TYPE	CHOOSE CLAUSE
Add New Section >	Context +	<input type="text" value="payment terms"/>
	Clause >	Payment Terms Services +
	Signature +	
	Image +	
	Item +	
	Embedded Template >	
	Custom +	

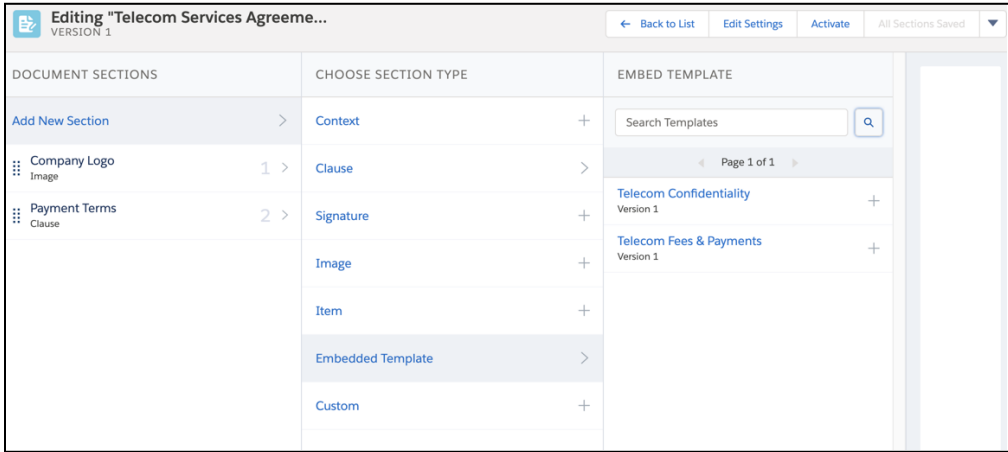
- b. Select **Payment Terms**, which is the clause you created back in Task 1. The clause is added to the template.



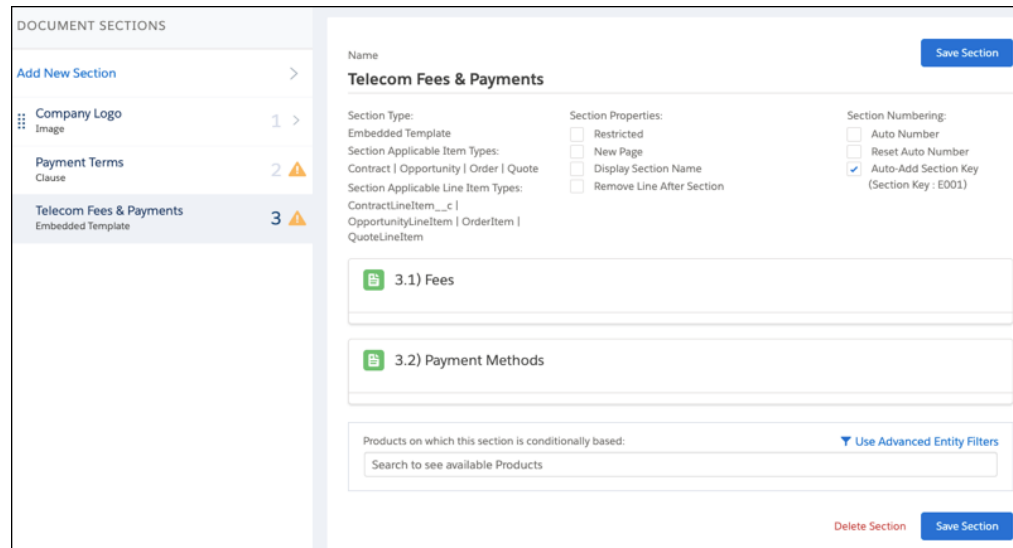
- c. Select **Display Section Name** from the Section Properties.

3. Add Embedded Template.

- a. Click **Add New Section**, then select **Embedded Template** as the section type. Click on the search icon next to Search Templates. The list of available templates is displayed. These are the document templates that are currently active.



- b. Select **Telecom Fees & Payments**. Your Telecom Services Agreement template now looks as follows:



The screenshot shows the 'DOCUMENT SECTIONS' interface. On the left, a list of sections includes 'Company Logo Image' (1), 'Payment Terms Clause' (2), and 'Telecom Fees & Payments Embedded Template' (3). The main area shows the configuration for 'Telecom Fees & Payments'. It includes fields for 'Name', 'Section Type' (Embedded Template), 'Section Properties' (Restricted, New Page, Display Section Name, Remove Line After Section), and 'Section Numbering' (Auto Number, Reset Auto Number, Auto-Add Section Key). Below these are two sub-sections: '3.1) Fees' and '3.2) Payment Methods'. At the bottom, there is a section for 'Products on which this section is conditionally based' with a search field and a 'Use Advanced Entity Filters' link.



NOTE:

If the **Telecom Fees & Payments** template is not available, then activate the template and try again.

- c. Select **Display Section Name** from the Section Properties.
4. Add Context Section.
- Click **Add New Section** and select **Context** as the section type.
 - Enter the following information:

Field	Value
Name	Agreement Header
Section Properties	✓ Restricted

Section Content

Telecom Services Agreement

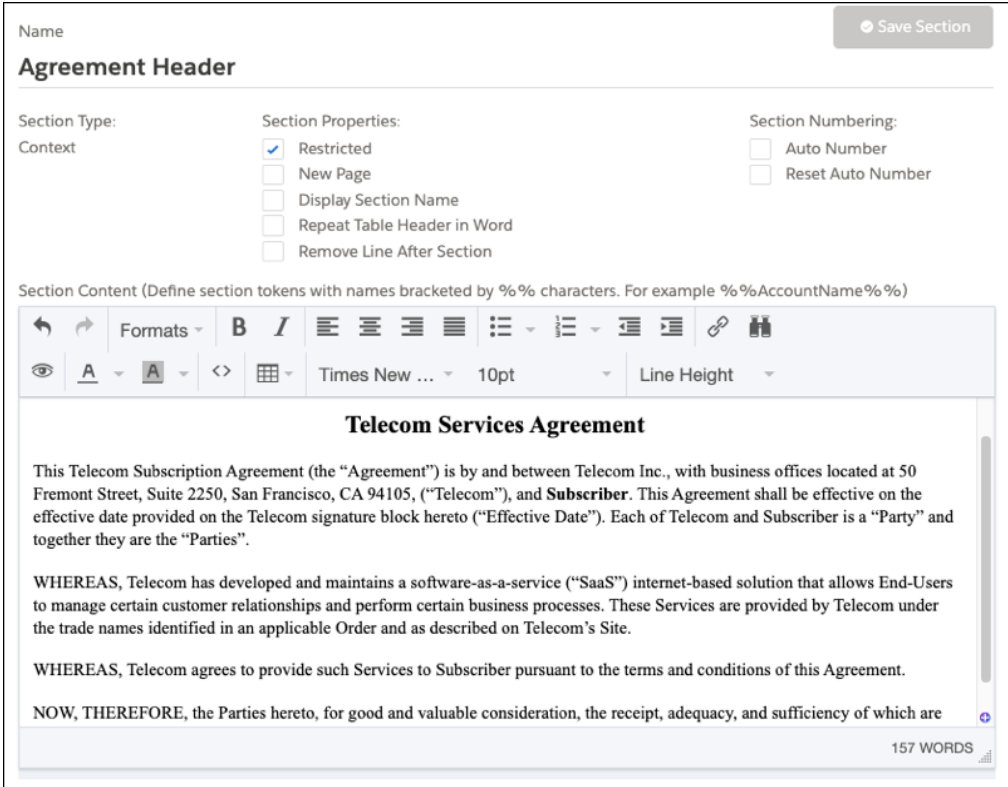
This Telecom Subscription Agreement (the "Agreement") is by and between Telecom Inc., with business offices located at 50 Fremont Street, Suite 2250, San Francisco, CA 94105, ("Telecom"), and **Subscriber**. This Agreement shall be effective on the effective date provided on the Telecom signature block hereto ("Effective Date"). Each of Telecom and Subscriber is a "Party" and together they are the "Parties".

WHEREAS, Telecom has developed and maintains a software-as-a-service ("SaaS") internet-based solution that allows End-Users to manage certain customer relationships and perform certain business processes. These Services are provided by Telecom under the trade names identified in an applicable Order and as described on Telecom's Site.

WHEREAS, Telecom agrees to provide such Services to Subscriber pursuant to the terms and conditions of this Agreement.

NOW, THEREFORE, the Parties hereto, for good and valuable consideration, the receipt, adequacy, and sufficiency of which are hereby acknowledged, and intending to be legally bound, hereby agree as follows.

c. Click **Save Section**.



Name: Agreement Header Save Section

Section Type: Context

Section Properties:

- Restricted
- New Page
- Display Section Name
- Repeat Table Header in Word
- Remove Line After Section

Section Numbering:

- Auto Number
- Reset Auto Number

Section Content (Define section tokens with names bracketed by %% characters. For example %%AccountName%%)

Telecom Services Agreement

This Telecom Subscription Agreement (the "Agreement") is by and between Telecom Inc., with business offices located at 50 Fremont Street, Suite 2250, San Francisco, CA 94105, ("Telecom"), and **Subscriber**. This Agreement shall be effective on the effective date provided on the Telecom signature block hereto ("Effective Date"). Each of Telecom and Subscriber is a "Party" and together they are the "Parties".

WHEREAS, Telecom has developed and maintains a software-as-a-service ("SaaS") internet-based solution that allows End-Users to manage certain customer relationships and perform certain business processes. These Services are provided by Telecom under the trade names identified in an applicable Order and as described on Telecom's Site.

WHEREAS, Telecom agrees to provide such Services to Subscriber pursuant to the terms and conditions of this Agreement.

NOW, THEREFORE, the Parties hereto, for good and valuable consideration, the receipt, adequacy, and sufficiency of which are

157 WORDS

5. Add Item Section.

- a. Click **Add New Section** and select **Item** as section type.
- b. Enter `Items Ordered` as Section Name.
- c. Select **Display Section Name** under Section Properties.
- d. Click **Add Column** and enter the following information:

Column Header	Column Token
Product	%%product%%
Quantity	%%Quantity%%

- e. Click **Define Mapping** for token `%%product%%`. Select `vlocity_cmt__Product2Id__c` from the dropdown and map it to **Name** from the second dropdown. Click **Apply**.

Token Mapping

Define Data Mapping for token `%%product%%` for Applicable Type: `ContractLineItem__c`

`vlocity_cmt__Product2Id__c` `Name`

Token Mapping:
`vlocity_cmt__Product2Id__r.Name`

- f. Click **Define Mapping** for token `%%Quantity%%`. Select `vlocity_cmt__Quantity__c` from the dropdown. Click **Apply**.

Token Mapping

Define Data Mapping for token `%%Quantity%%` for Applicable Type: `ContractLineItem__c`

`vlocity_cmt__Quantity__c`

Token Mapping:
`vlocity_cmt__Quantity__c`

g. Click **Save Section**.

Name
Save Section

Items Ordered

Section Type:

Item

Section Properties:

New Page

Display Section Name

Repeat Table Header in Word

Remove Line After Section

Section Numbering:

Auto Number

Reset Auto Number

Construct a Table For Item Section by Adding a Column

COLUMN HEADER
COLUMN TOKENS
TOTAL TOKENS

Font Family:

Arial

Font Size:

10pt

Font Color:

#000000

Fill Color:

i.e. #FF0000

Select all Font Formats to Apply

Bold

Underline

Italic

Select Text Alignment

Left

Center

Right

Border::

1px solid #000000

All columns must include a header and a %%token%%. If included, please specify total token as a %%totalToken%%.

Product
%%product%%
Display Total:

Quantity
%%Quantity%%
Display Total:

+

Add Column

%%product%%

ContractLineItem__c

vlocity_cmt__Product2Id__r.Name

[Edit Settings](#)

%%Quantity%%

ContractLineItem__c

vlocity_cmt__Quantity__c

[Edit Settings](#)

6. Add Signature Section.

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16

- Click **Add New Section** and select **Signature** as section type.
- Enter Section Name as `Signature Form`.
- Select **New Page** under Section Properties.
- Select **Table** in Section Content and insert 2X2 Table. Enter the following information:

Signer	\vlcSignHere1\
--------	----------------

Date	\vlcSignDate1\
------	----------------

Name Save Section

Signature Form

Section Type: Signature

Section Properties:

- Restricted
- New Page
- Display Section Name
- Repeat Table Header in Word
- Remove Line After Section

Section Numbering:

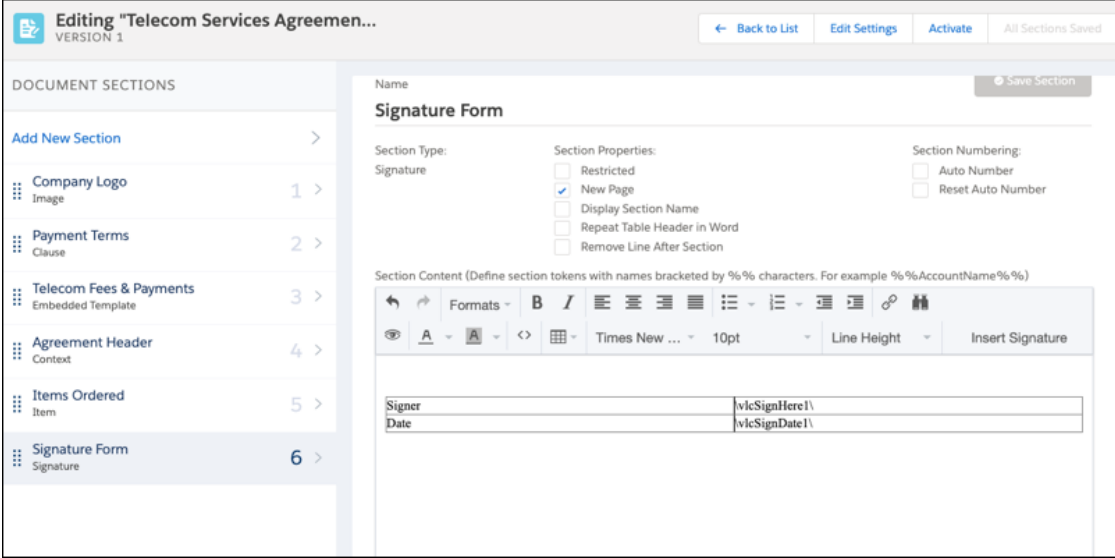
- Auto Number
- Reset Auto Number


Section Content (Define section tokens with names bracketed by %% characters. For example %%AccountName%%)

Rich text editor toolbar: Undo, Redo, Formats, Bold, Italic, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Table, Font face (Arial), Font size (10pt), Line Height, Insert Signature

Signer	\vlcSignHere1\
Date	\vlcSignDate1\

7. Click **Save All Sections** to save your work up to this point. Note that you could have clicked Save Section each time you added a new section.

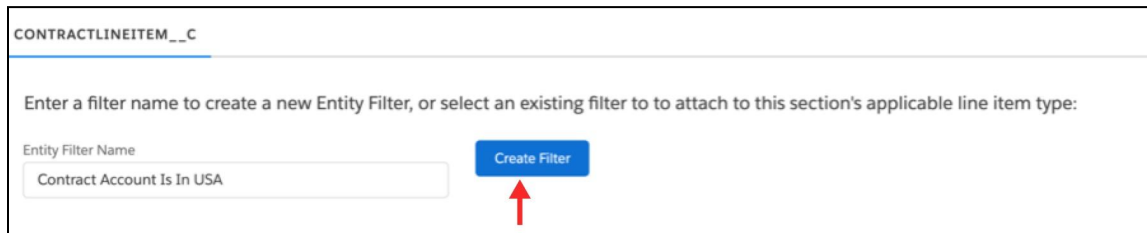


You can also use the Drag and Drop button () to re-arrange the template sections.

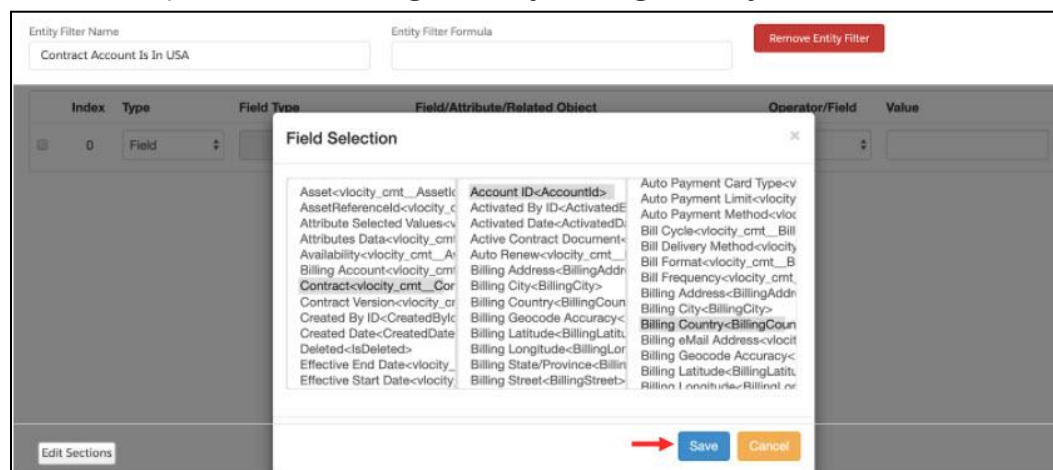
Task 4: Set template section display conditions

We now need to set the conditional display for a couple of the sections.

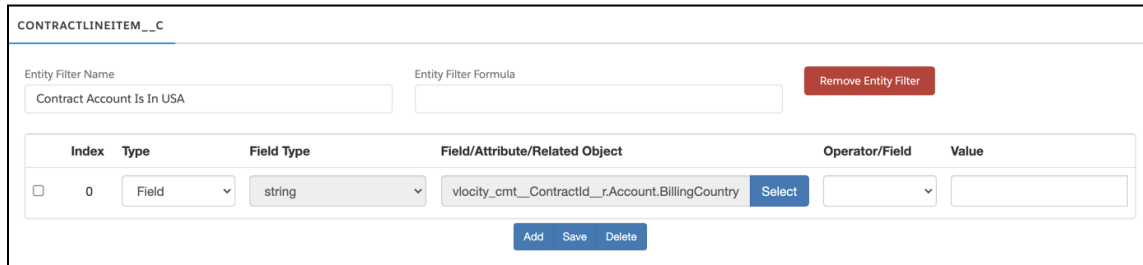
1. Open the **Payment Terms** section, scroll to view below the clause content, then click **Use Advanced Entity Filters**.
2. Rename the entity filter to `Contract Account Is In USA`, then click **Create Filter**.



3. Click **Add**.
4. Keep **Field** selected as the type.
5. Click **Select** in the **Field/Attribute/Related Object** field:
 - a. Select **Contract<vlocity_cmt__ContractId__c>**.
 - b. In the second pane, select **Account ID<AccountId>**.
 - c. In the third pane, select **Billing Country<BillingCountry>**.

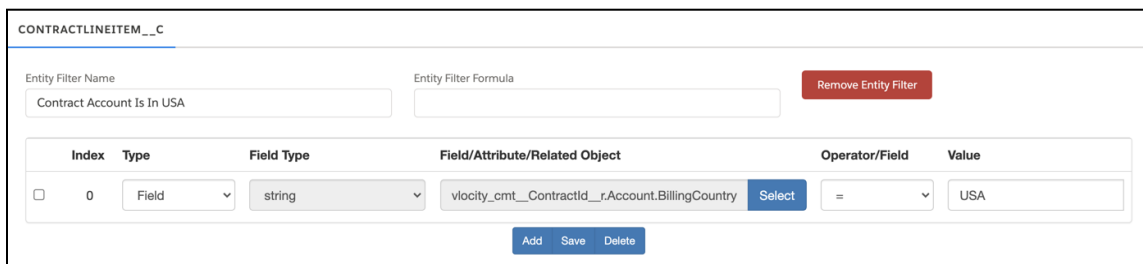


6. Click **Save**. The Field/Attribute/Related Object displays as:
vlocity_cmt__ContractId__r.Account.BillingCountry.



Index	Type	Field Type	Field/Attribute/Related Object	Operator/Field	Value
0	Field	string	vlocity_cmt__ContractId__r.Account.BillingCountry	Select	

7. Select **=** as the **Operator/Field**, then enter **USA** as the **Value**.



Index	Type	Field Type	Field/Attribute/Related Object	Operator/Field	Value
0	Field	string	vlocity_cmt__ContractId__r.Account.BillingCountry	=	USA

8. Click **Save**, then click **Edit Sections**. An entity filter is now set for the Payment Terms section.



Entity Filters on which this section is conditionally based:

ContractLineItem__c: Contract Account Is In USA

[Edit Advanced Entity Filters](#)

[Switch Back to Basic Product Filters](#)

Task 5: Activate the telecom services agreement template

We're now ready to activate this template.

1. Click **Activate**. (You may need to click **Save All Sections** first).
2. Click **Yes, Save Template** when you see the confirmation prompt. A message indicates that the template is now active and read-only.

The template is now available for generating documents under Contracts.