

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: Work with Contracts

Requirements

Sophia's sales team does a great job closing B2B orders but they are working with a home-grown system where contracts are stored as files and are created manually without a contract management system. Knowing that Felix is piloting new software for the Contact Center, she wonders if he can also build contract management software to help her sales team stay organized.

Meeting with Sophia, Felix demonstrates that moving from paper to CLM software can standardize and organize the creation of contracts.

Prerequisites

- None

Tasks

1. Create a contract
2. Review the contract
3. Generate a new contract document
4. Customise a generated contract document
5. Submit a contract for internal approval
6. Send a contract document for eSignature

Time: 30 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 contract

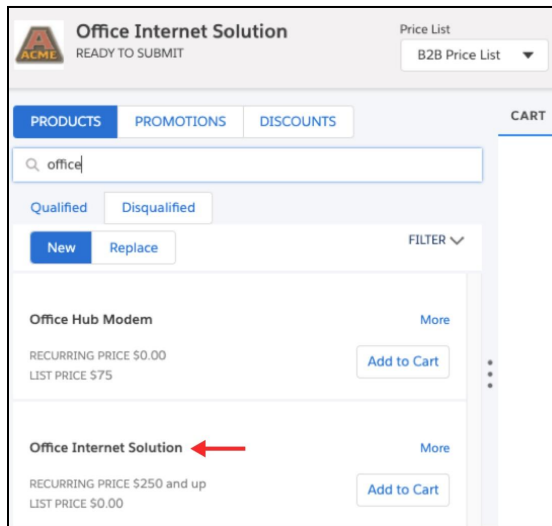
1. Using the **Lightning App Launcher**  , navigate to the Contract Lifecycle Management.
2. In the Lightning Navigation bar, click **Orders**.
3. In the upper-right corner, click **New**.
4. Enter the following information:


Field	Value
Order Name	Office Internet Solution
Account Name	Acme

Price List	B2B Price List
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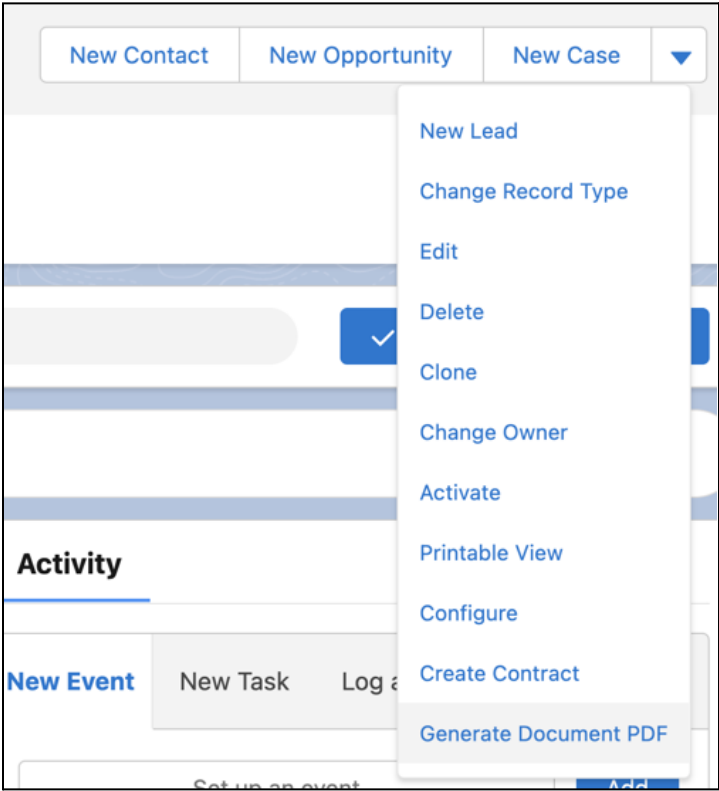
Order Start Date	[today's date]
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5. Click **Save**.
6. Click on the **Power Launcher's** search field and click **Configure Order**. This invokes the Cart.
7. In the **search dialog** of the product list, enter `office`.



8. Click **Add to Cart** next to **Office Internet Solution PS**.
9. Click the **Take Me There** icon  to configure the missing attribute.
10. Using the **Download Speed** dropdown menu, select **200 Mbps**. Click **Close**.
11. Click **View Record** to exit the Cart. Click on the **Orders** tab and select the **Office Internet Solution** order created.

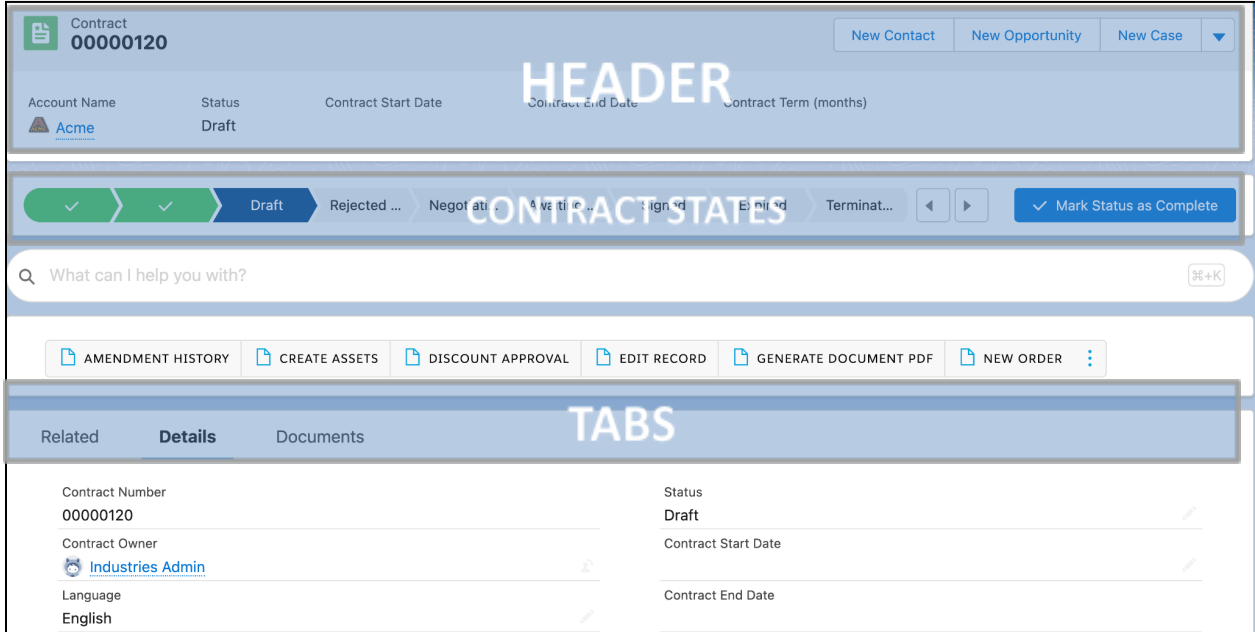
12. Select **Create Contract** from the drop down on the top right.



Review the main sections of the Contract page.


Task 2: Review the contract

1. Notice the **contract header**. The header displays the account name with which the contract is associated (Acme), the current contract status (Draft), the contract's start and end dates and the length of time in months that the contract is valid. Also, notice the contract level action buttons on the top right corner.

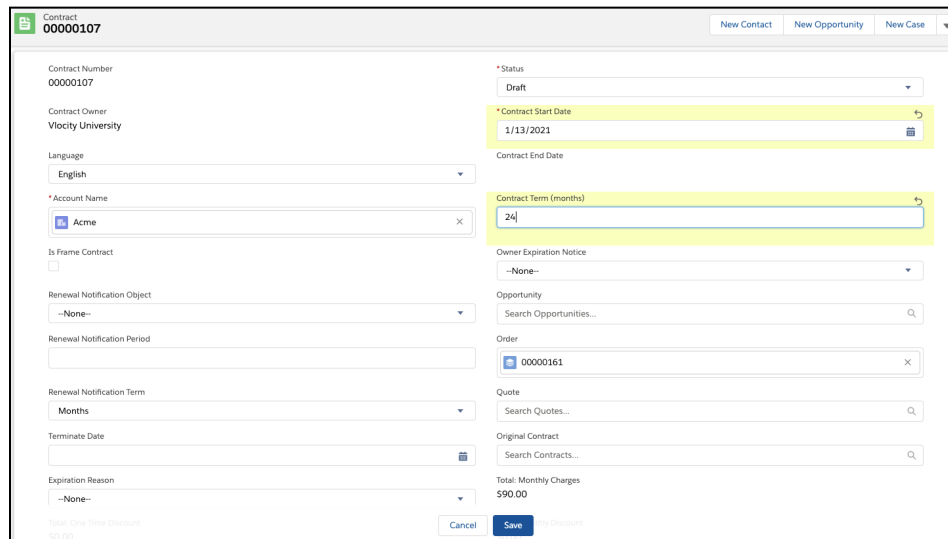


The screenshot displays the Salesforce interface for a contract record. At the top, the contract number 00000120 is shown. Below this, the account name is Acme, the status is Draft, and the contract start and end dates are visible. The contract term in months is also shown. The CONTRACT STATES section shows a progress bar with states: Draft, Rejected, Negotiated, Activated, Signed, Expired, and Terminated. The TABS section shows three tabs: Related, Details, and Documents. The Details tab is selected, showing fields for Contract Number, Status, Contract Owner, Contract Start Date, Language, and Contract End Date.

2. The **Contract States** represent the various states that the contract goes through in its lifecycle. These states are defined using the Vlocity State Model.
3. The three **tabs** are available to view the additional contract details, line items, and documents.
4. Select the **Related** tab to view the Contract Line Items, contract Approval History and documents attached in Notes & Attachments. Under the Contract Line Items section, click **View All** to view the line items.

Related				Details	Documents
 Contract Line Items (3)				New	
Name	Product	Quantity	One Time Charge		
Office Internet Solution	Office Internet Solution	1	\$0.00	▼	
Broadband Cable Service	Broadband Cable Service	1	\$0.00	▼	
Installation	Installation	1	\$100.00	▼	
View All					

5. Click the **Details** tab and notice the contract details: **Contract Number**, **Account Name**, **Status**, **Contract Start Date**, **Contract End Date** and **Contract Term**. The order number displays in the **Order** field.
6. Let's edit contract details.
 - a. Select today's date for the **Contract Start Date**.
 - b. Enter 24 for **Contract Term (months)**.
 - c. Click **Save**.

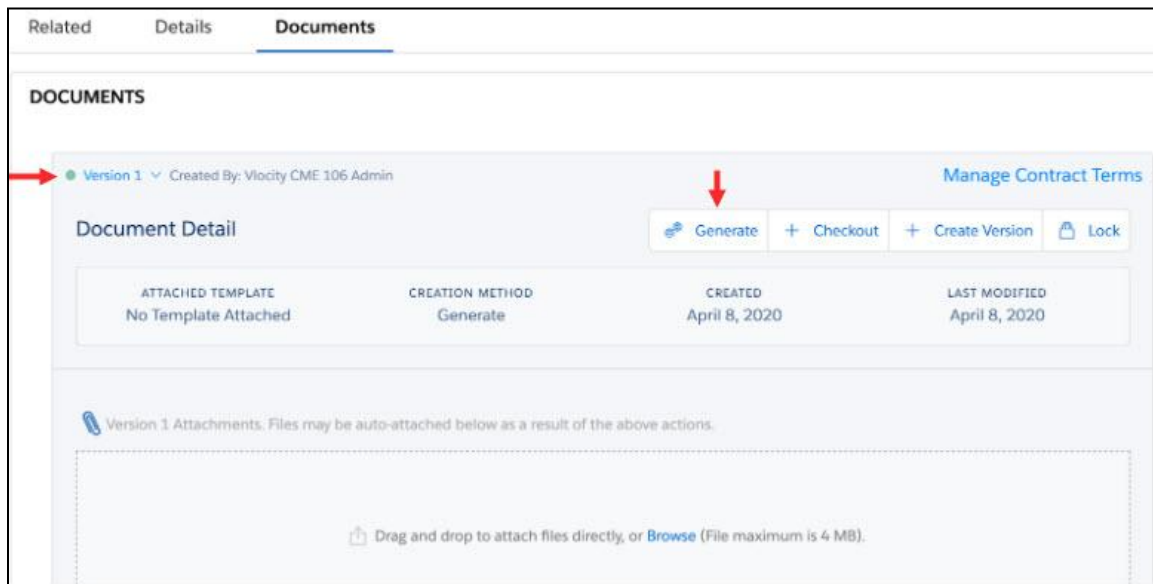


Once you update the contract details, notice the **Contract Start Date**, **Contract End Date** and **Contract Term (months)** fields are updated in the contract header.

Task 3: Generate a contract document

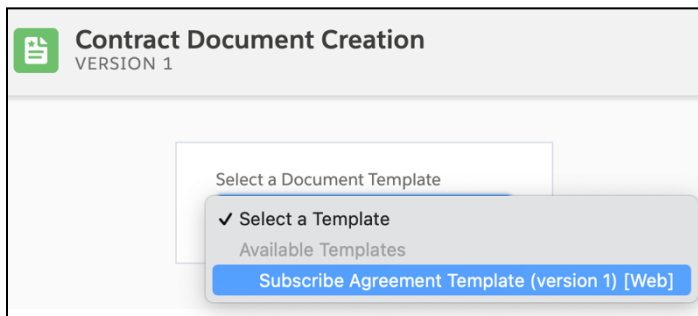
Now that we've created a contract, the next step is to generate a contract document based on one of the active document templates. Under the Documents tab, notice the contract document actions, which are distinct from the contract actions.

1. The Documents page shows that Version 1 of the contract document has no template attached yet, and it's ready for you to generate.

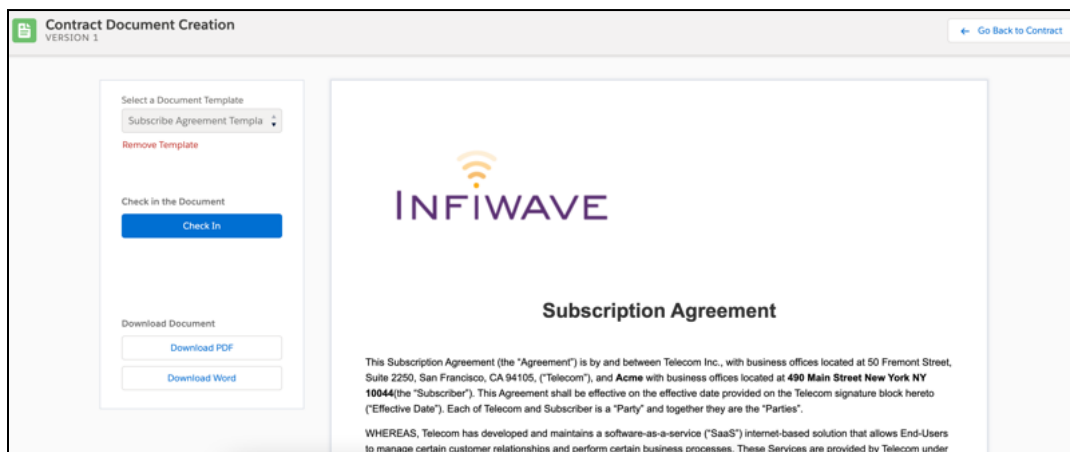


2. Click **Generate**. The Contract Document Creation page is displayed. However, there's no document template attached yet.

3. Open the **Select a Document Template** menu to view the list of available templates.

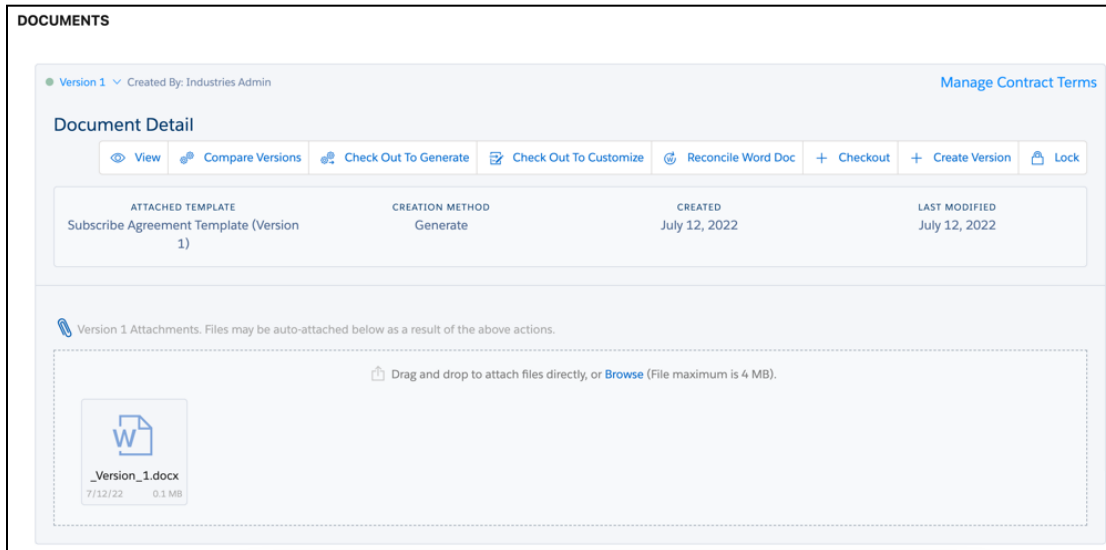


4. Select the **Subscribe Agreement Template (version 1) [Web]** template. The document template is displayed in the pane.



5. Click **Check In**.

- Under the Documents tab, Version 1 now has a generated template. Notice that a Word document version of the generated document is attached and that more contract document actions are now available.



DOCUMENTS

Version 1 Created By: Industries Admin Manage Contract Terms

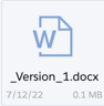
Document Detail

[View](#) [Compare Versions](#) [Check Out To Generate](#) [Check Out To Customize](#) [Reconcile Word Doc](#) [+ Checkout](#) [+ Create Version](#) [Lock](#)

ATTACHED TEMPLATE	CREATION METHOD	CREATED	LAST MODIFIED
Subscribe Agreement Template (Version 1)	Generate	July 12, 2022	July 12, 2022

Version 1 Attachments. Files may be auto-attached below as a result of the above actions.

Drag and drop to attach files directly, or [Browse](#) (File maximum is 4 MB).


_Version_1.docx
7/12/22 0.1 MB



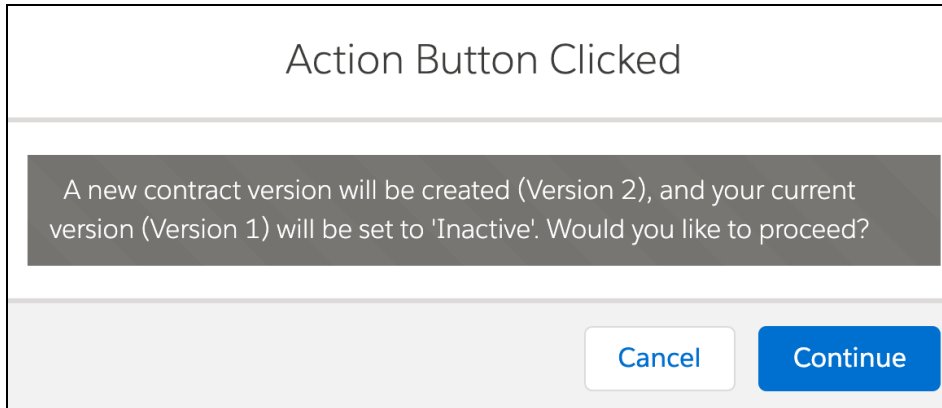
NOTE:

You can perform various contract document operations on each contract document version. These operations are Vlocity Actions. The Contract State Model controls the available actions for each version and who can perform them and when.

Task 4: Customise a generated contract document

We've generated a contract document, and now it's time to customize it.

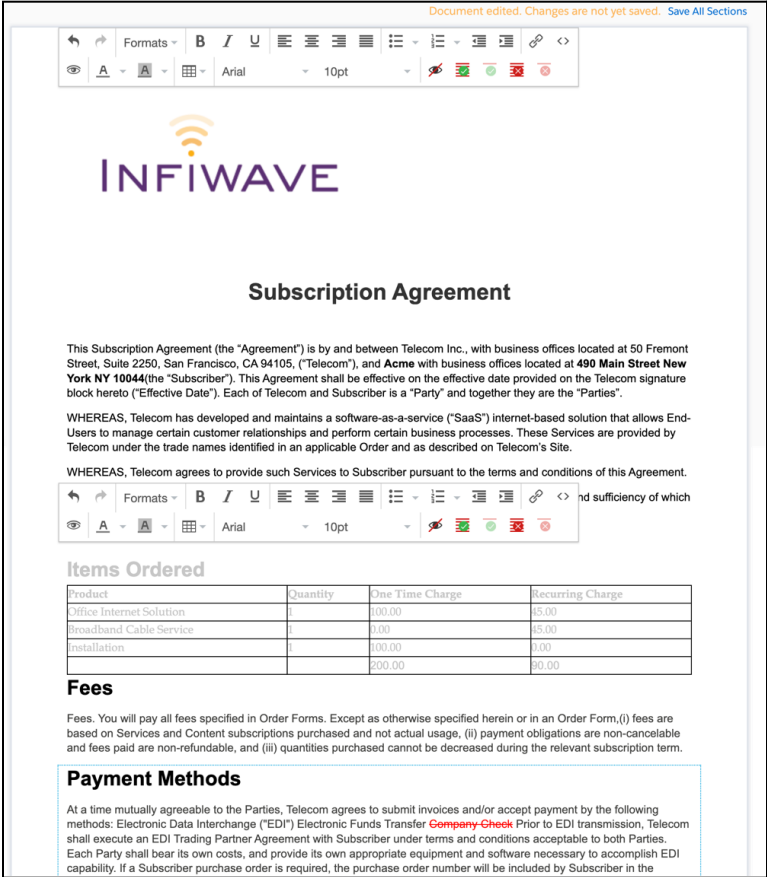
1. Click **Check Out To Customize**. The Action Button Clicked notification is displayed.



2. Click **Continue** at the prompt.
3. Scroll down the online version of the document and click on the **Payment Methods** clause.
4. Select the “**Company Check**” text and delete it. Notice that the text turns red, and you can hover over the text to view who deleted the text and when.

- 5. Notice the “Document contains redlines” message, and the **Accept and Reject Redlines** buttons. We’re not going to accept the redlines in this version of the contract document, so don’t click these buttons.

Document edited. Changes are not yet saved. [Save All Sections](#)



INFIWAVE

Subscription Agreement

This 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 **Acme** with business offices located at **490 Main Street New York NY 10044**(the "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.

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Items Ordered

Product	Quantity	One Time Charge	Recurring Charge
Office Internet Solution	1	100.00	45.00
Broadband Cable Service	1	0.00	45.00
Installation	1	100.00	0.00
		200.00	90.00

Fees

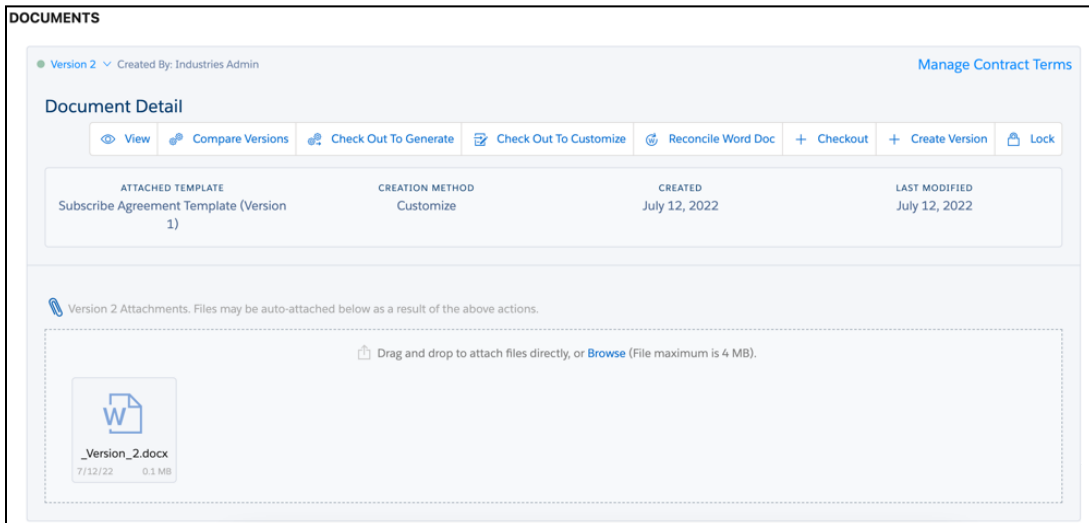
Fees. You will pay all fees specified in Order Forms. Except as otherwise specified herein or in an Order Form, (i) fees are based on Services and Content subscriptions purchased and not actual usage, (ii) payment obligations are non-cancelable and fees paid are non-refundable, and (iii) quantities purchased cannot be decreased during the relevant subscription term.

Payment Methods

At a time mutually agreeable to the Parties, Telecom agrees to submit invoices and/or accept payment by the following methods: Electronic Data Interchange ("EDI") Electronic Funds Transfer Company-Check Prior to EDI transmission, Telecom shall execute an EDI Trading Partner Agreement with Subscriber under terms and conditions acceptable to both Parties. Each Party shall bear its own costs, and provide its own appropriate equipment and software necessary to accomplish EDI capability. If a Subscriber purchase order is required, the purchase order number will be included by Subscriber in the

- 6. Click **Save All Sections**.
- 7. Click **Check In**.

8. Under the Documents tab, **Version 2** is now active.



The screenshot shows the 'DOCUMENTS' interface for 'Version 2'. At the top, it says 'Version 2' with a dropdown arrow and 'Created By: Industries Admin'. There is a 'Manage Contract Terms' link. Below this is the 'Document Detail' section with a toolbar containing: View, Compare Versions, Check Out To Generate, Check Out To Customize, Reconcile Word Doc, Checkout, Create Version, and Lock. A table below the toolbar lists document details:

ATTACHED TEMPLATE	CREATION METHOD	CREATED	LAST MODIFIED
Subscribe Agreement Template (Version 1)	Customize	July 12, 2022	July 12, 2022

Below the table, there is a section for 'Version 2 Attachments'. It includes a note: 'Version 2 Attachments. Files may be auto-attached below as a result of the above actions.' and a dashed box for file uploads with the instruction: 'Drag and drop to attach files directly, or Browse (File maximum is 4 MB)'. One attachment is shown: a Word document icon labeled '_Version_2.docx' with a date of '7/12/22' and a size of '0.1 MB'.

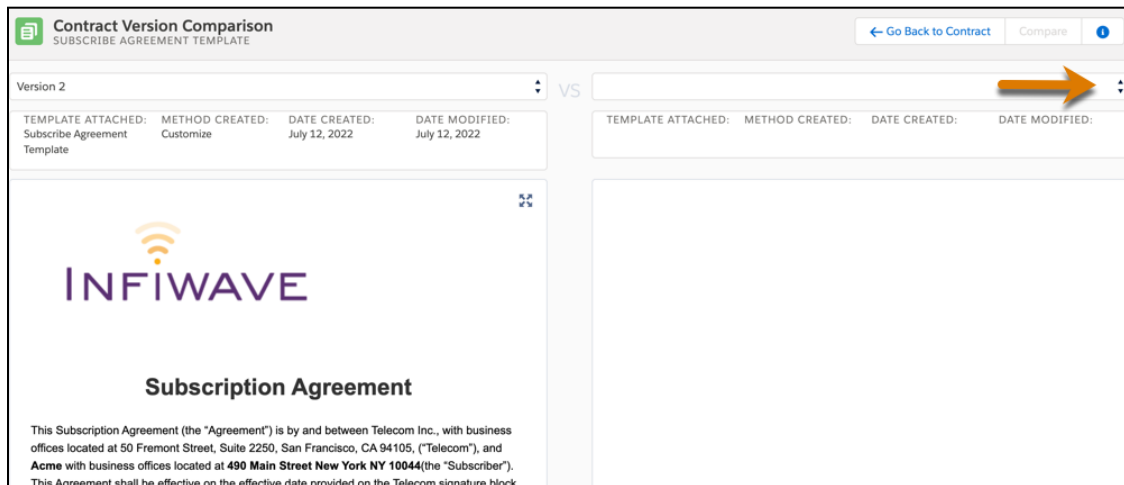
9. Click **View** to view the online version of Version 2.
- a. Scroll to the **Payment Methods** section to see that the redlines are visible.

Payment Methods

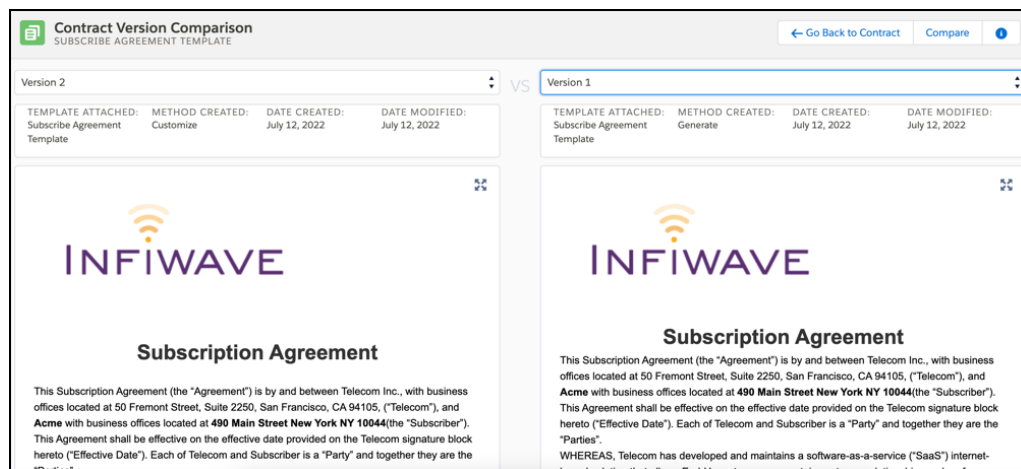
At a time mutually agreeable to the Parties, Telecom agrees to submit invoices and/or accept payment by the following methods: Electronic Data Interchange ("EDI") Electronic Funds Transfer ~~Company-Check~~ Prior to EDI transmission, Telecom shall execute an EDI Trading Partner Agreement with Subscriber under terms and conditions acceptable to both Parties. Each Party shall bear its own costs, and provide its own appropriate equipment and software necessary to accomplish EDI capability. If a Subscriber purchase order is required, the purchase order number will be included by Subscriber in the relevant Order Form. If no purchase order number is included in an Order Form, the parties agree such purchase order will not be required to effect payments there under.

- b. Click **Go Back to Contract**.

10. Click **Compare Versions**. The Contract Version Comparison page is displayed. As you opened this page from Version 2, this version displays on the left. You now need to select a different version on the right.



- a. Select **Version 1**. Both versions are now visible in the panes.



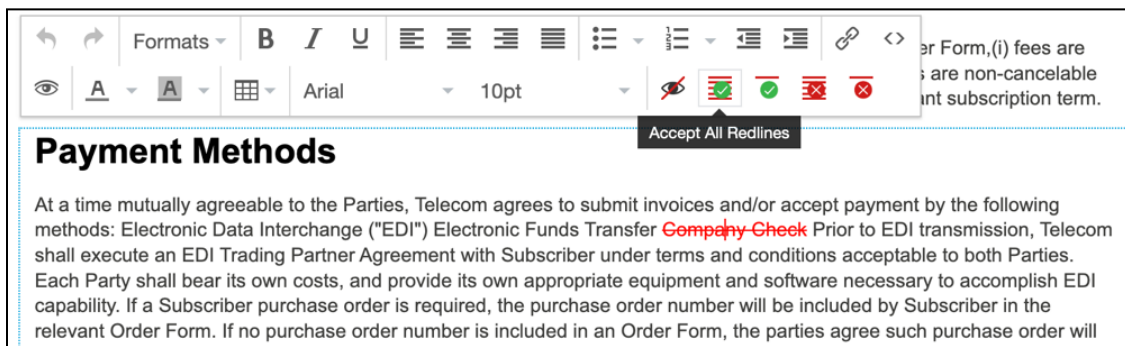
- b. Click **Compare**. Notice the Show Redlines button is set by default.

- c. Scroll down to **Payment Methods** to view the redlines showing the differences between the versions.

<p>an Order Form,(i) fees are based on Services and Content subscriptions purchased and not actual usage, (ii) payment obligations are non-cancelable and fees paid are non-refundable, and (iii) quantities purchased cannot be decreased during the relevant subscription term.</p> <p>Payment Methods</p> <p>At a time mutually agreeable to the Parties, Telecom agrees to submit invoices and/or accept payment by the following methods: Electronic Data Interchange ("EDI") Electronic Funds Transfer Company Check Prior to EDI transmission, Telecom shall execute an EDI Trading Partner Agreement with Subscriber under terms and conditions acceptable to both Parties. Each Party shall bear its own costs, and provide its own appropriate equipment and software necessary to accomplish EDI capability. If a Subscriber purchase order is required, the purchase</p>	<p>Payment Methods</p> <p>At a time mutually agreeable to the Parties, Telecom agrees to submit invoices and/or accept payment by the following methods: Electronic Data Interchange ("EDI") Electronic Funds Transfer Company Check Prior to EDI transmission, Telecom shall execute an EDI Trading Partner Agreement with Subscriber under terms and conditions acceptable to both Parties. Each Party shall bear its own costs, and provide its own appropriate equipment and software necessary to accomplish EDI capability. If a Subscriber purchase order is required, the purchase order number will be included by Subscriber in the relevant Order Form. If no purchase order number is included in an Order Form, the parties agree such purchase order will not be required to effect payments there under.</p>
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- d. Click **Go Back to Contract**. The next steps are to accept the redlines in a new version of the document.
11. Click **Check Out To Customize**. The Action Button Clicked notification is displayed.
12. Click **Continue**. Version 3 of the contract document is now displayed.

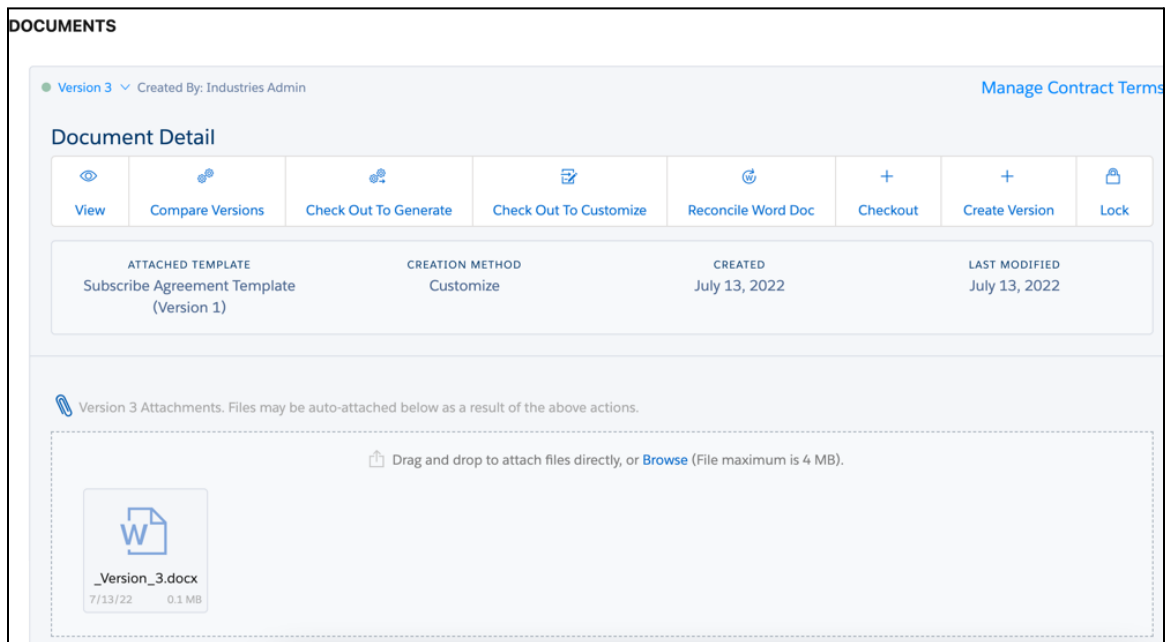
13. Scroll and select the Payment Methods, then click **Accept All Redlines**.



The screenshot shows a document editor interface. At the top is a rich text editor toolbar with various formatting options. Below the toolbar, the document content is visible. A section titled "Payment Methods" is highlighted with a blue border. The text in this section contains a redline: "Comply Check". A tooltip with the text "Accept All Redlines" is positioned over a button in the document.

14. Click **Save All Sections**, then click **Check In**.

15. Under the Documents tab, **Version 3** of the contract document is now active.



The screenshot displays the "DOCUMENTS" interface. At the top, it shows "Version 3" selected and "Created By: Industries Admin". A "Manage Contract Terms" link is visible. Below this is a "Document Detail" section with a row of action buttons: View, Compare Versions, Check Out To Generate, Check Out To Customize, Reconcile Word Doc, Checkout, Create Version, and Lock. A table below the buttons provides details for the document:

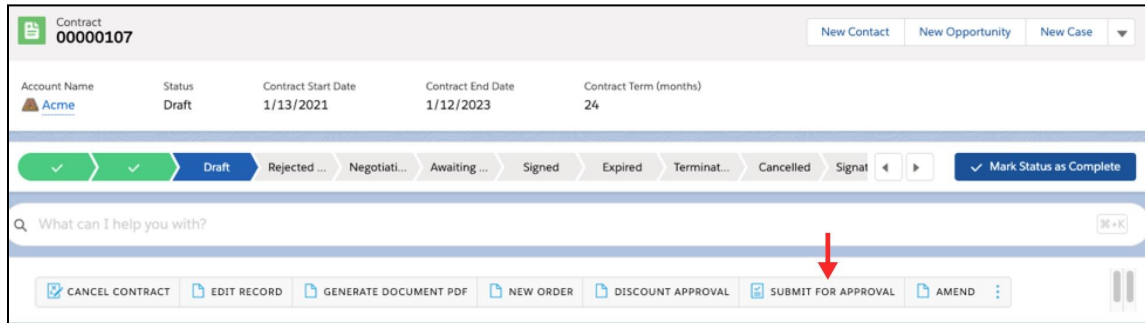
ATTACHED TEMPLATE	CREATION METHOD	CREATED	LAST MODIFIED
Subscribe Agreement Template (Version 1)	Customize	July 13, 2022	July 13, 2022

Below the table, there is a section for "Version 3 Attachments" with a message: "Files may be auto-attached below as a result of the above actions." A dashed box contains a "Drag and drop to attach files directly, or Browse (File maximum is 4 MB)." instruction. An attachment card is shown with a Word document icon, the filename "_Version_3.docx", and the date "7/13/22" and size "0.1 MB".

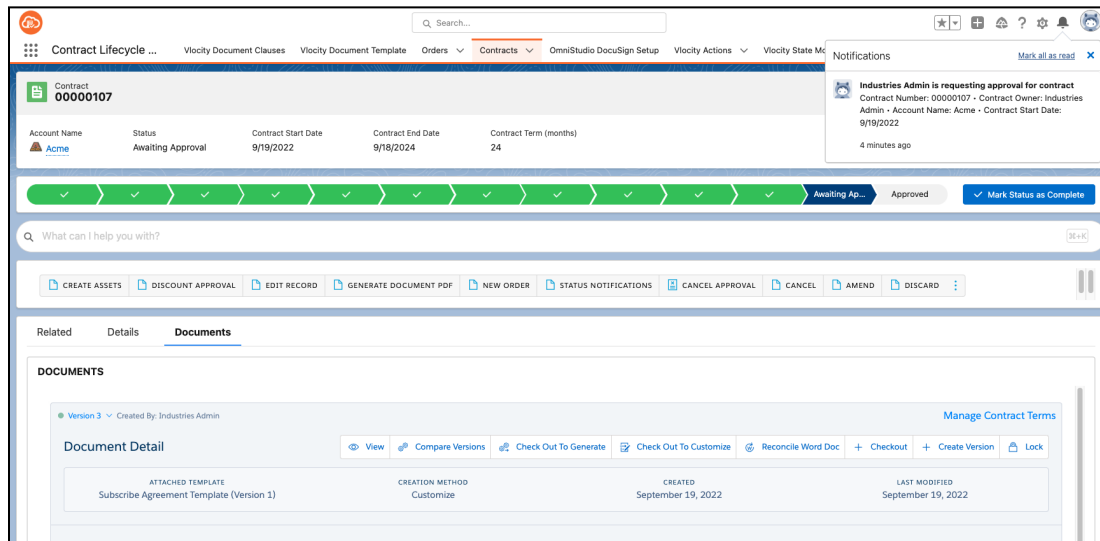
Task 5: Submit a contract document for internal approval

Now that you've customized the contract document, it's time to send it for internal approval. The contract is still in Draft status.

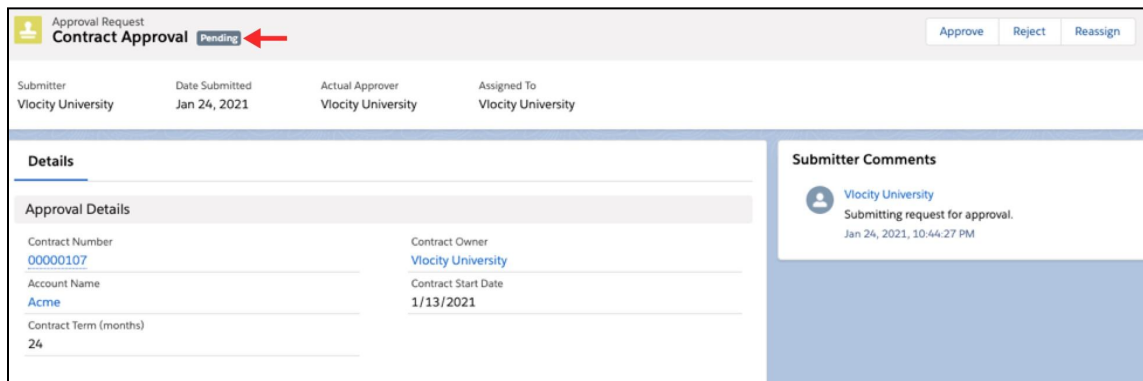
1. Under Contracts Actions, click **SUBMIT FOR APPROVAL**. The contract status changes to Awaiting Approval. You'll also receive a notification email.



2. Click the bell icon on top right and then click the notification. This opens the Contract Approval Request page.

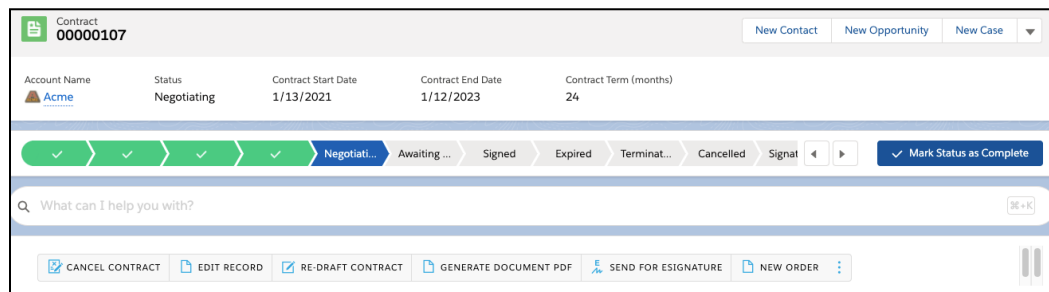


3. The Contract Approval status is **Pending**.



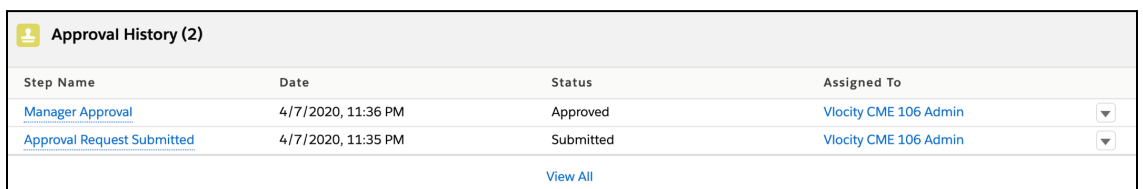
The screenshot shows the 'Approval Request' page for a contract. The status is 'Pending', indicated by a red arrow. The submitter is 'Vlocity University', submitted on 'Jan 24, 2021', and assigned to 'Vlocity University'. The details section shows contract number '00000107', account name 'Acme', and contract term '24' months. A submitter comment from 'Vlocity University' states 'Submitting request for approval.' on 'Jan 24, 2021, 10:44:27 PM'. Action buttons for 'Approve', 'Reject', and 'Reassign' are visible in the top right.

4. Click **Approve**, enter `Approved`, then click **Approve** again. The Contract Approval status changes to **Approved**.
5. Go back to the Contract page tab and then refresh the page.
6. Notice the following changes:
 - a. The contract status is now set to **Negotiating**.
 - b. The contract actions are now different. Your contract has now reached a status where you can send it to the customer for eSignature.



The screenshot shows the contract details for '00000107'. The account is 'Acme'. The status is 'Negotiating'. The contract start date is '1/13/2021' and the end date is '1/12/2023'. A progress bar at the bottom shows the current status 'Negotiating...' followed by 'Awaiting ...', 'Signed', 'Expired', 'Terminat...', and 'Cancelled'. Action buttons include 'CANCEL CONTRACT', 'EDIT RECORD', 'RE-DRAFT CONTRACT', 'GENERATE DOCUMENT PDF', 'SEND FOR ESIGNATURE', and 'NEW ORDER'.

7. Select the **Related** tab to view the Approval History.



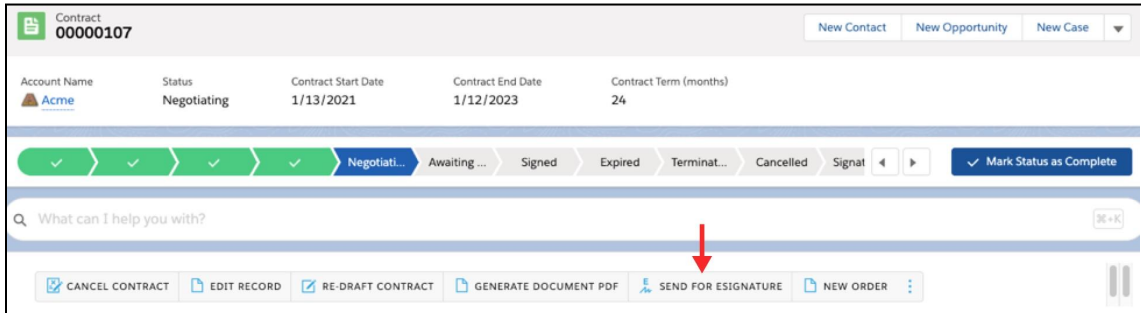
Step Name	Date	Status	Assigned To
Manager Approval	4/7/2020, 11:36 PM	Approved	Vlocity CME 106 Admin
Approval Request Submitted	4/7/2020, 11:35 PM	Submitted	Vlocity CME 106 Admin

[View All](#)

Task 6: Send a contract document for signature

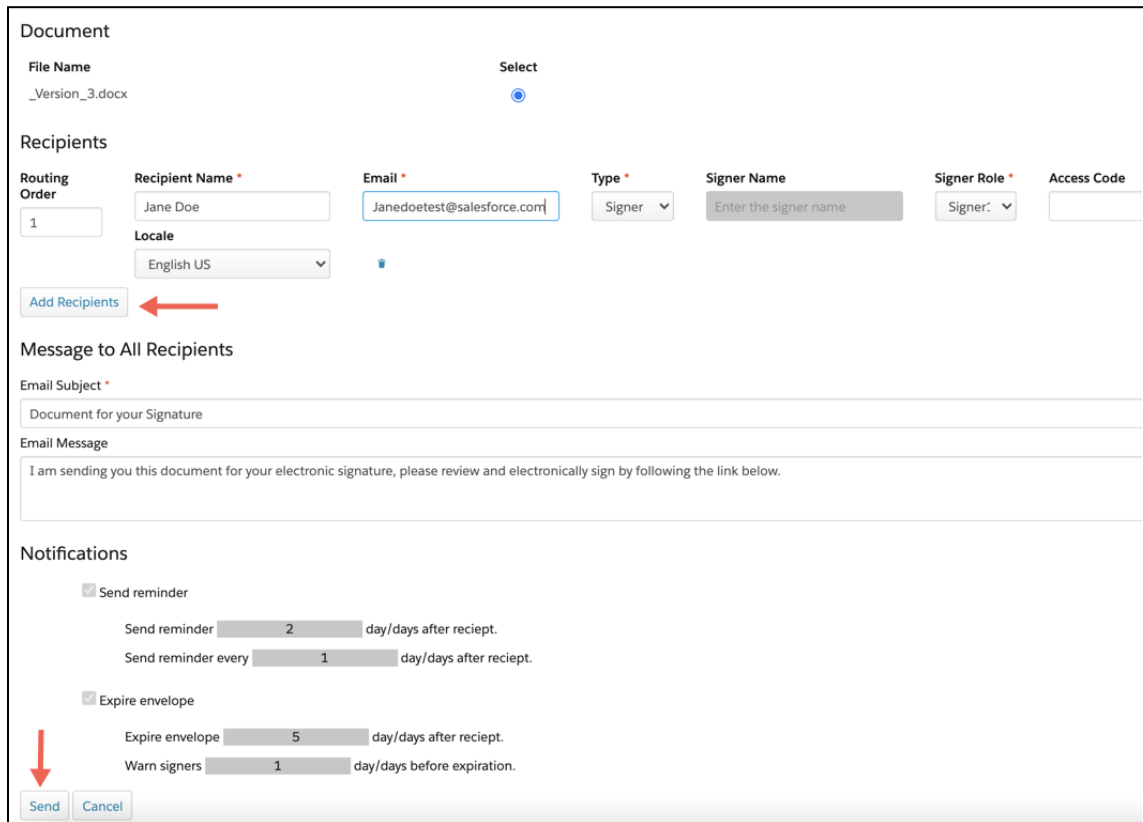
Now that the contract document is approved, you can send it to your customer for eSignature.

1. Click the **SEND FOR ESIGNATURE** action to open the Document Email Message to Recipients page.



The screenshot shows the Salesforce interface for a contract record. At the top, the contract ID is 00000107. Below this, a table lists contract details: Account Name (Acme), Status (Negotiating), Contract Start Date (1/13/2021), Contract End Date (1/12/2023), and Contract Term (months) (24). A progress bar below the table shows the contract's history through various stages: Negotiating (current), Awaiting..., Signed, Expired, Terminat..., and Cancelled. A 'Mark Status as Complete' button is visible on the right. Below the progress bar is a search bar with the text 'What can I help you with?'. At the bottom, an action bar contains several buttons: CANCEL CONTRACT, EDIT RECORD, RE-DRAFT CONTRACT, GENERATE DOCUMENT PDF, SEND FOR ESIGNATURE (highlighted with a red arrow), and NEW ORDER. A vertical menu icon is on the far right.

2. Click **Add Recipients**, then enter your own name as the **Recipient Name** and your own email as the **Recipient Email**.



Document

File Name: _Version_3.docx

Recipients

Routing Order	Recipient Name *	Email *	Type *	Signer Name	Signer Role *	Access Code
1	Jane Doe	Janedoetest@salesforce.com	Signer	Enter the signer name	Signer	

Locale: English US

Add Recipients

Message to All Recipients

Email Subject: Document for your Signature

Email Message: I am sending you this document for your electronic signature, please review and electronically sign by following the link below.

Notifications

Send reminder

Send reminder: 2 day/days after receipt.

Send reminder every: 1 day/days after receipt.

Expire envelope

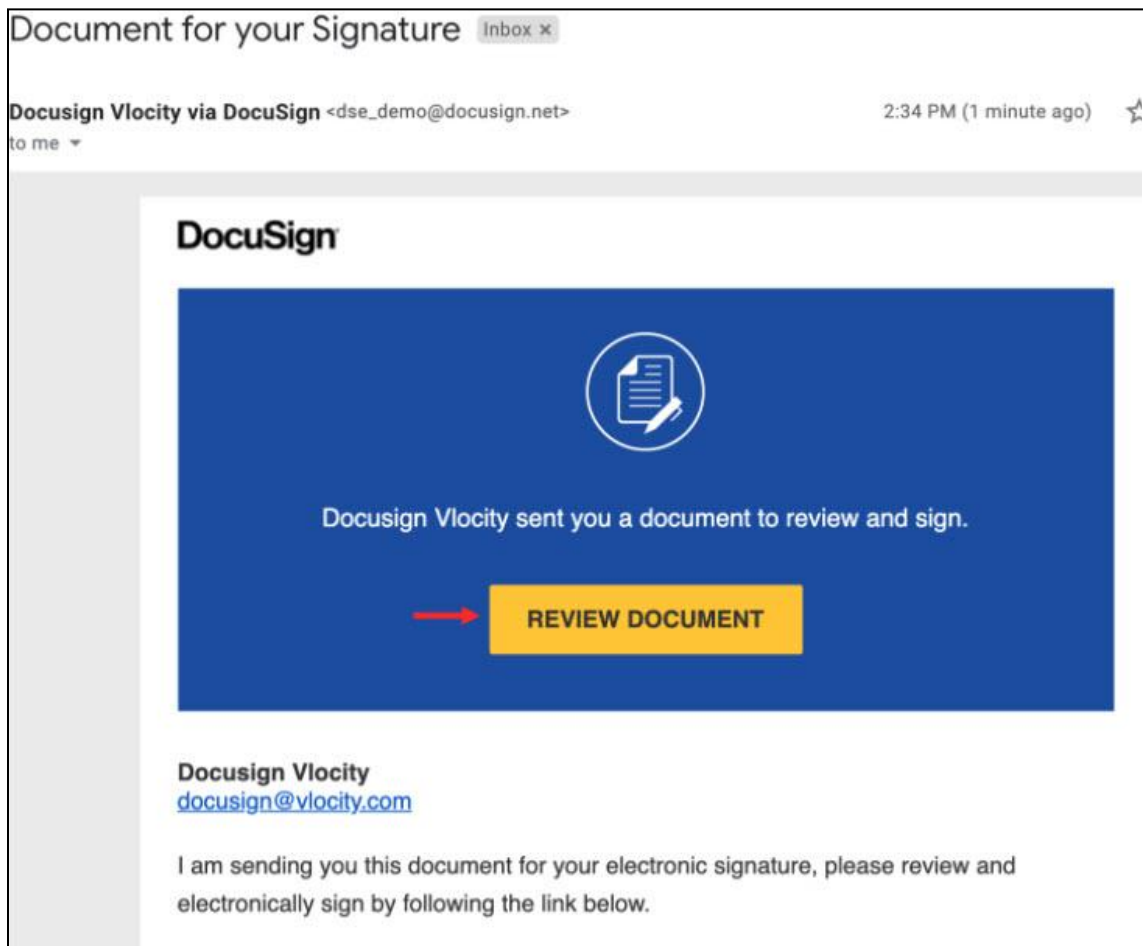
Expire envelope: 5 day/days after receipt.

Warn signers: 1 day/days before expiration.

Send Cancel

3. Click **Send**. You'll receive a notification email.
4. Notice that the contract status is now set to **Awaiting Signature** and the contract actions have changed again. (If needed, refresh the browser).

5. Go to your inbox and open the “Document for your Signature” email.

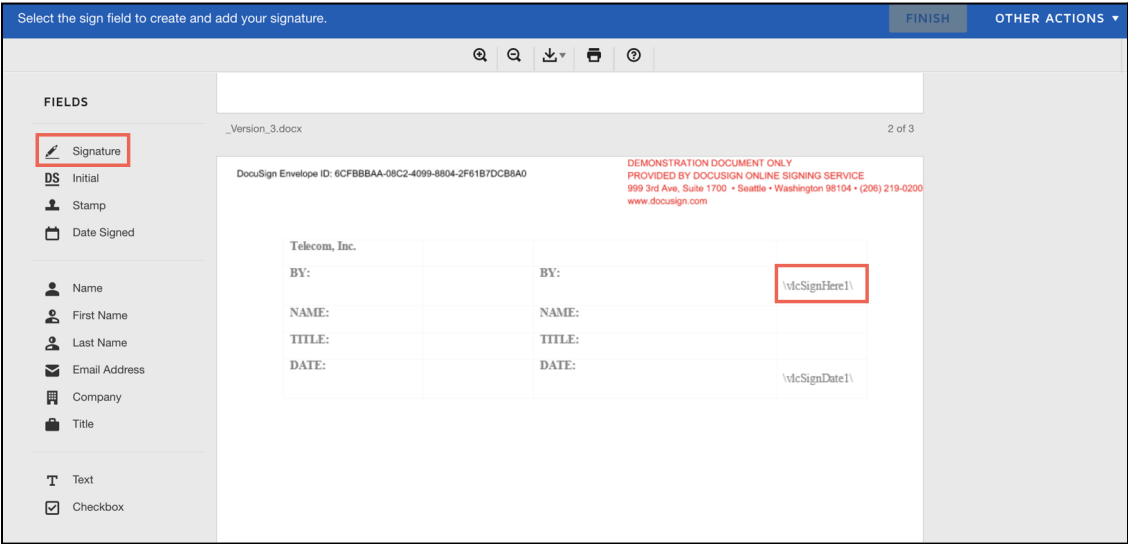


6. Click **REVIEW DOCUMENT**.

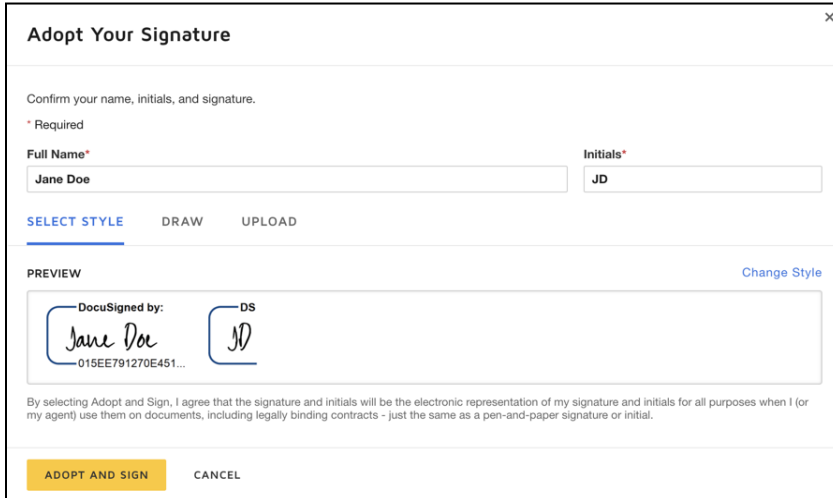
- 7. Select the **I agree to use electronic records and signatures** checkbox, then click **CONTINUE**.



- 8. Click **Signature** on left under the Fields section and then drag the yellow Sign chevron on the sign here field.



- Preview your signature and initials, then click **ADOPT AND SIGN**. (If your signature is not there, you will need to create it).



Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Jane Doe Initials* JD

SELECT STYLE DRAW UPLOAD

PREVIEW Change Style

DocuSigned by: Jane Doe DS JD
015EE791270E451...

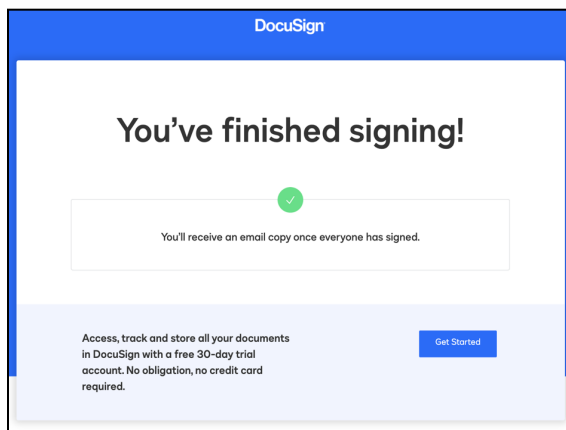
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

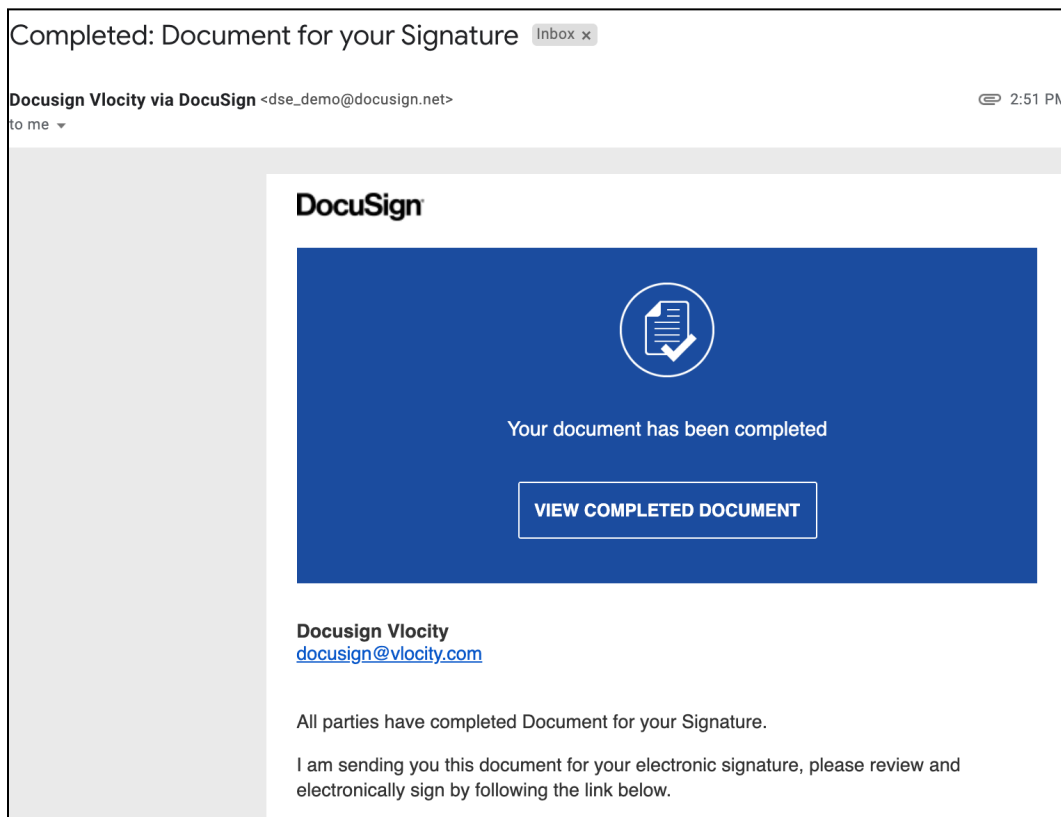
- Click **FINISH**.



- Click **NO THANKS** at the Save a Copy of Your Document prompt. You'll see this confirmation message.

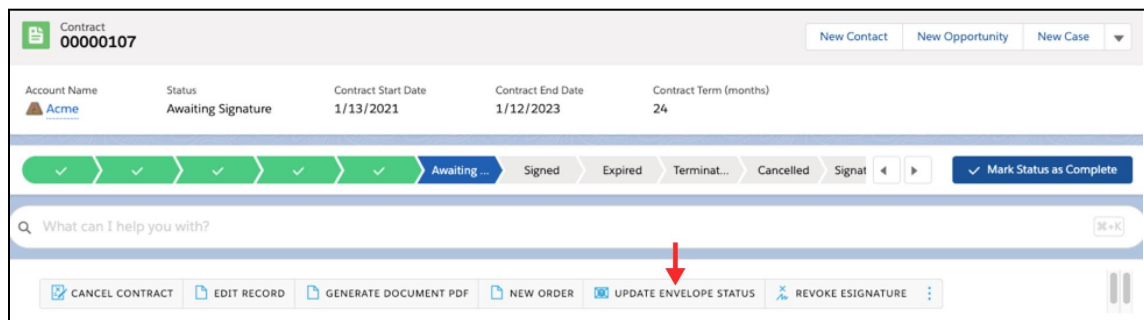


12. You'll receive a confirmation email, which you can also review.

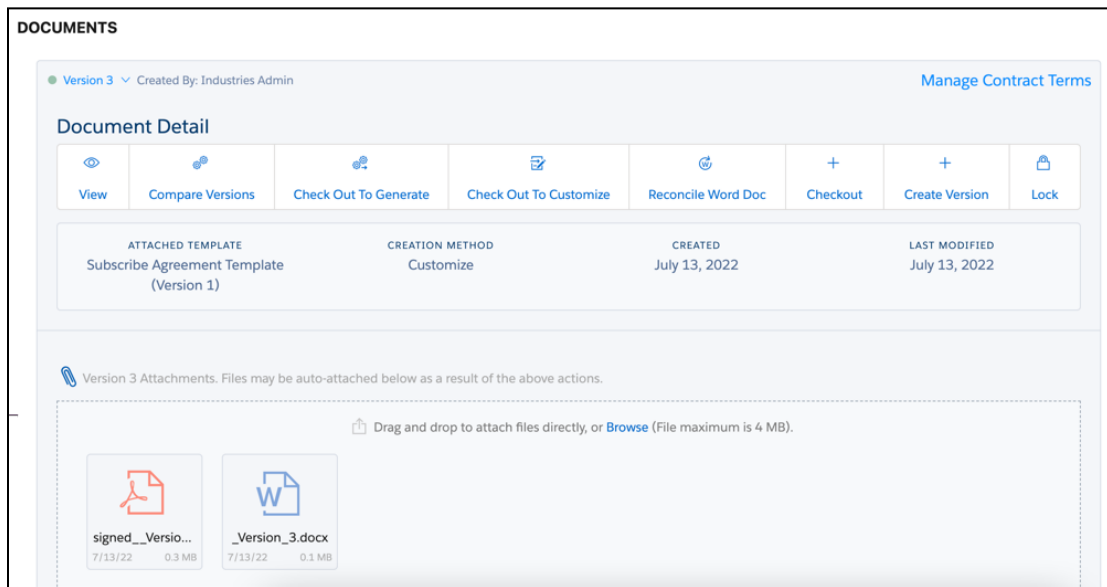


13. Go back to the contract record.

14. Click **UPDATE ENVELOPE STATUS**. The contract status changes to **Signed**.

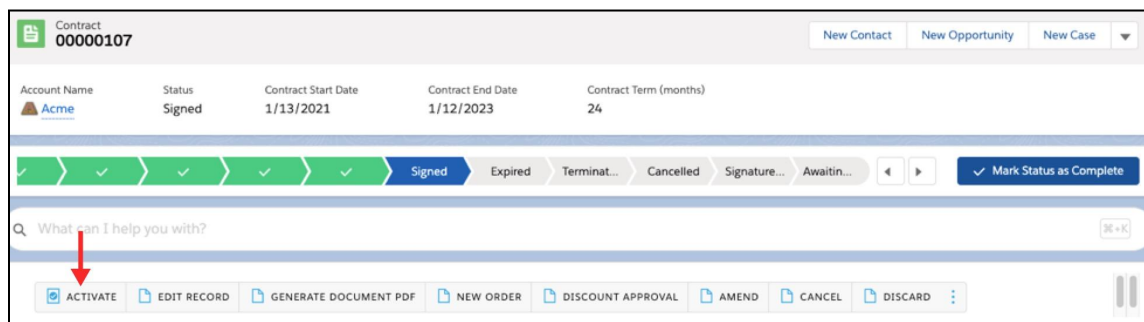


15. Notice the signed document is now attached to **Version 3** of the contract document.



Finally, let's activate the signed contract.

16. Click **ACTIVATE** to activate the contract.



17. The contract status changes to Activated. You can also see this status under the Details tab.

