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 Lifecyle Management.
2. In the Lightning Navigation bar, click **Orders**.
3. In the upper-right corner, click **New**.
4. Enter the following information:

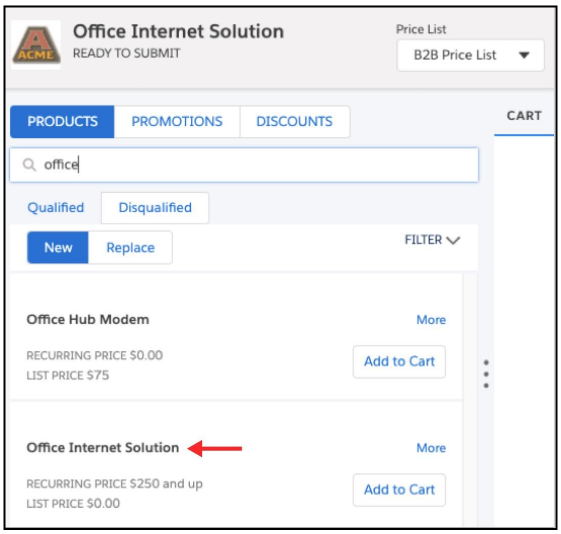
Field	Value
Order Name	`Office Internet Solution`
Account Name	**Acme**

Price List	**B2B Price List**
Order Start Date	**[today's date]**

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`.



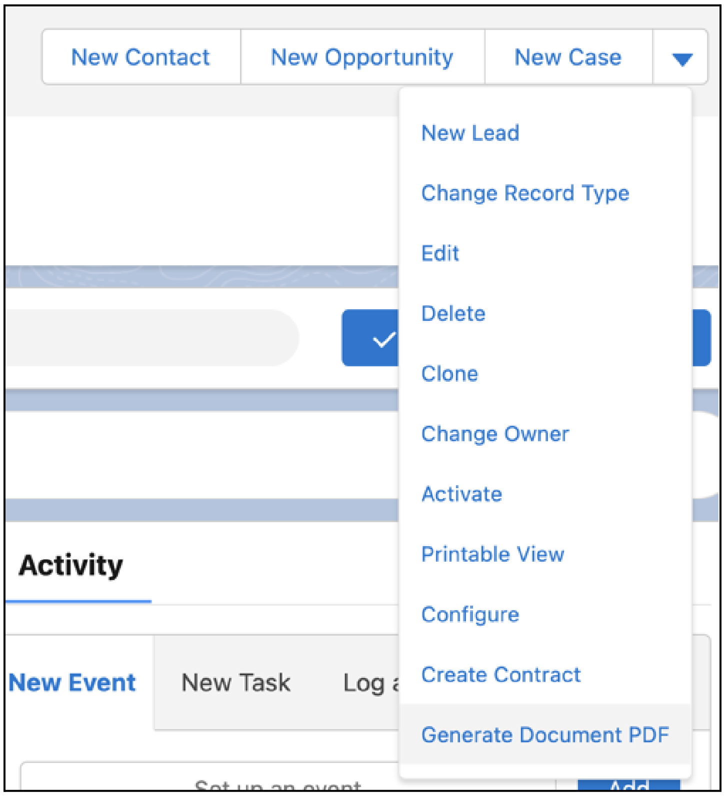
8. Click **Add to Cart** next to **Office Internet Solution PS**.

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.

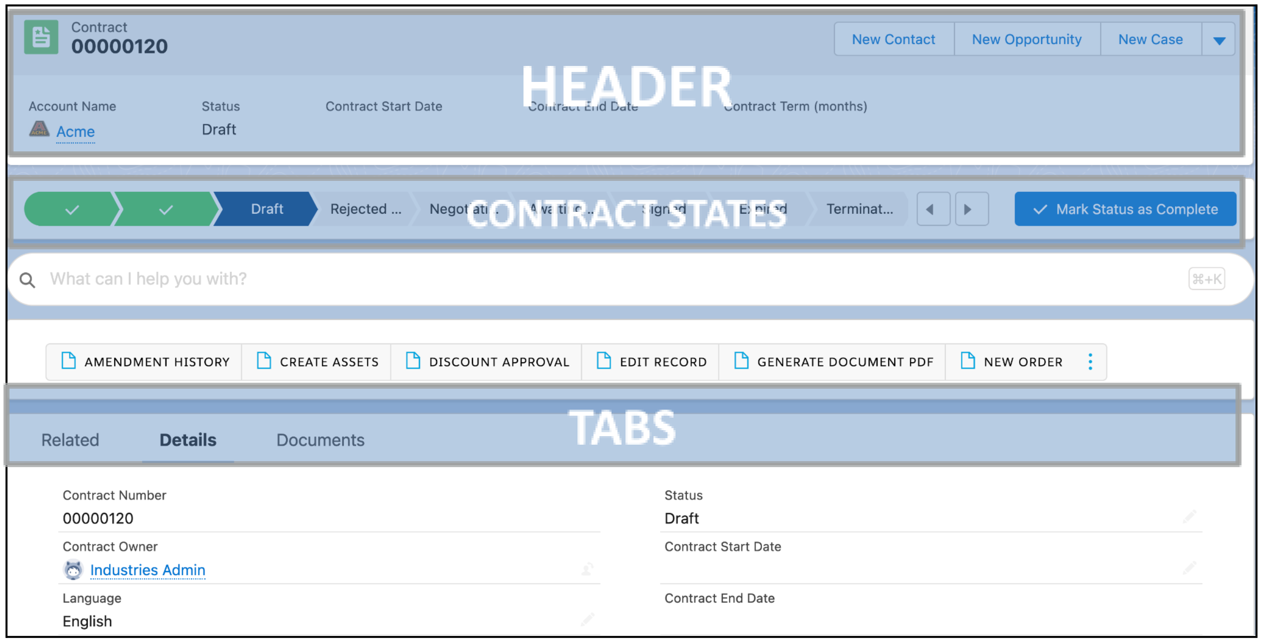
12. Select **Create Contract** from the drop down on the top right.



Review the main sections of the Contract page.

Task 2: Review the contract

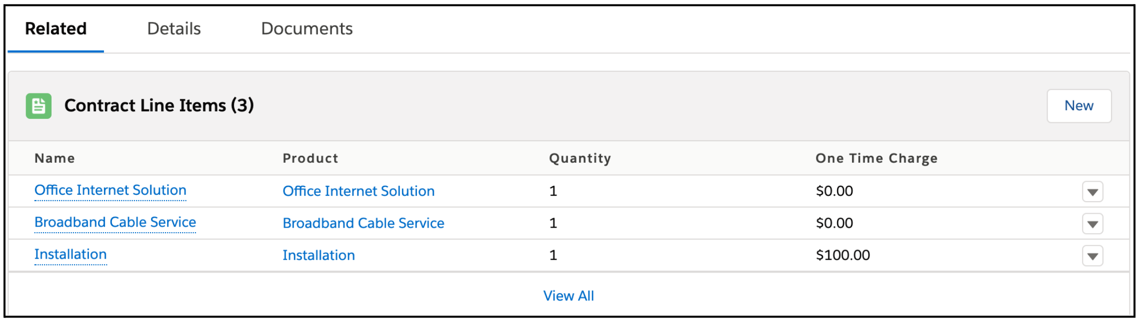
1. Notice the **contract header**. The header displays the account name with which the contract is associated (Acme), the current contract status (Draft), the contract's start and end dates and the length of time in months that the contract is valid. Also, notice the contract level action buttons on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



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.

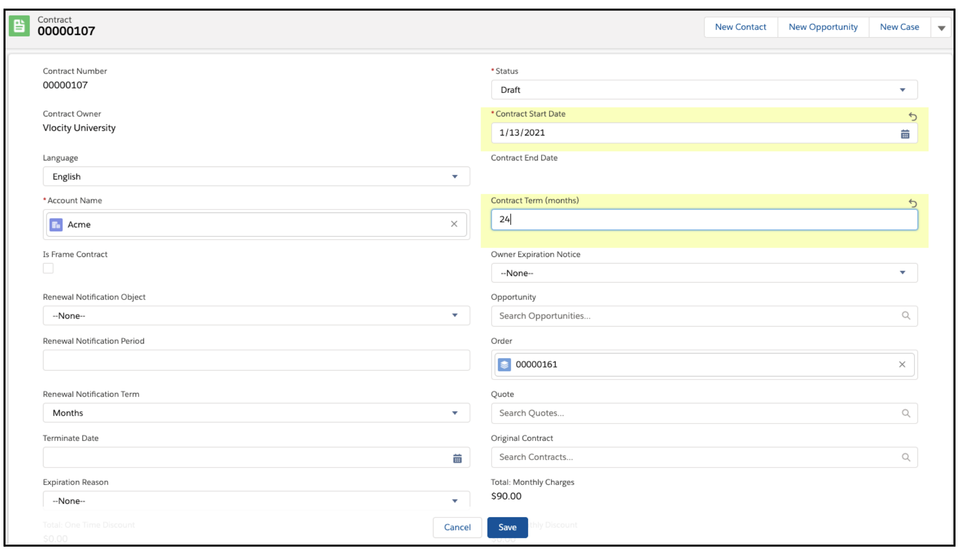
4. Select the **Related** tab to view the Contract Line Items, contract Approval History and documents attached in Notes & Attachments. Under the Contract Line Items section, click **View All** to view the line items.



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**.

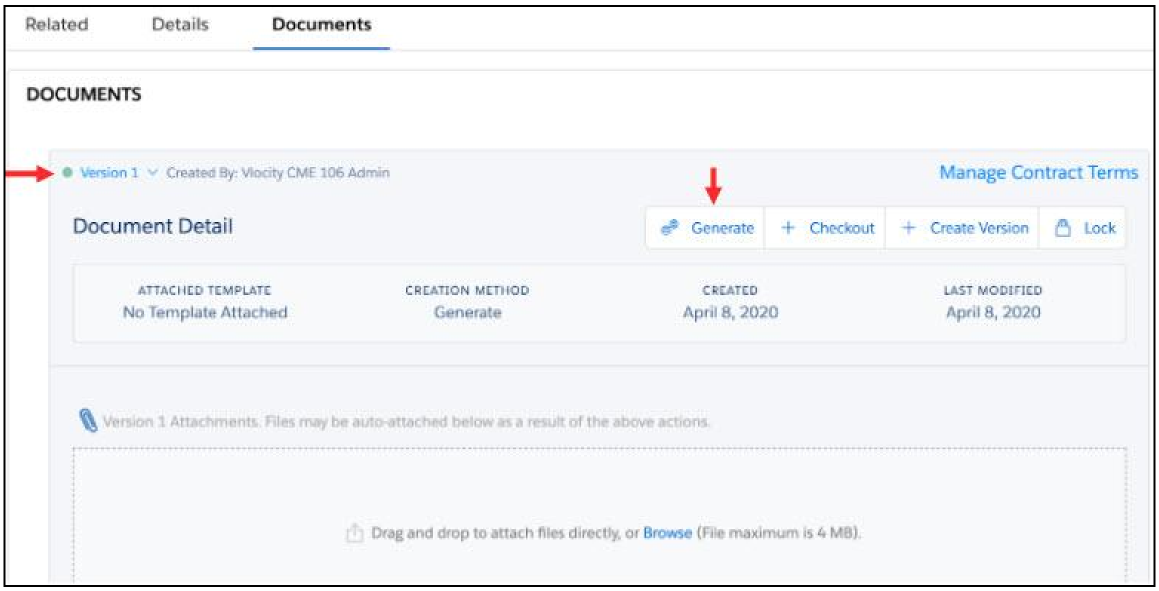


Once you update the contract details, notice the **Contract Start Date, Contract End Date** and **Contract Term (months)** fields are updated in the contract header.

Task 3: Generate a contract document

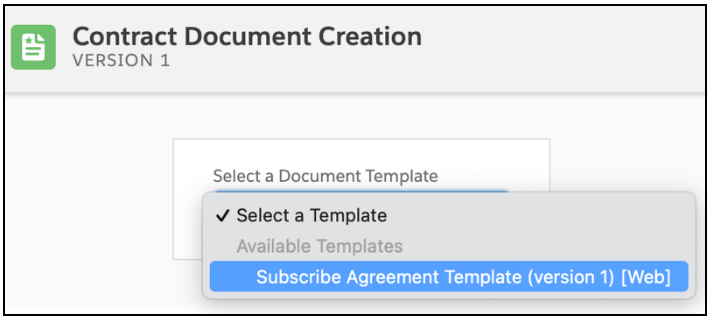
Now that we've created a contract, the next step is to generate a contract document based on one of the active document templates. Under the Documents tab, notice the contract document actions, which are distinct from the contract actions.

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.

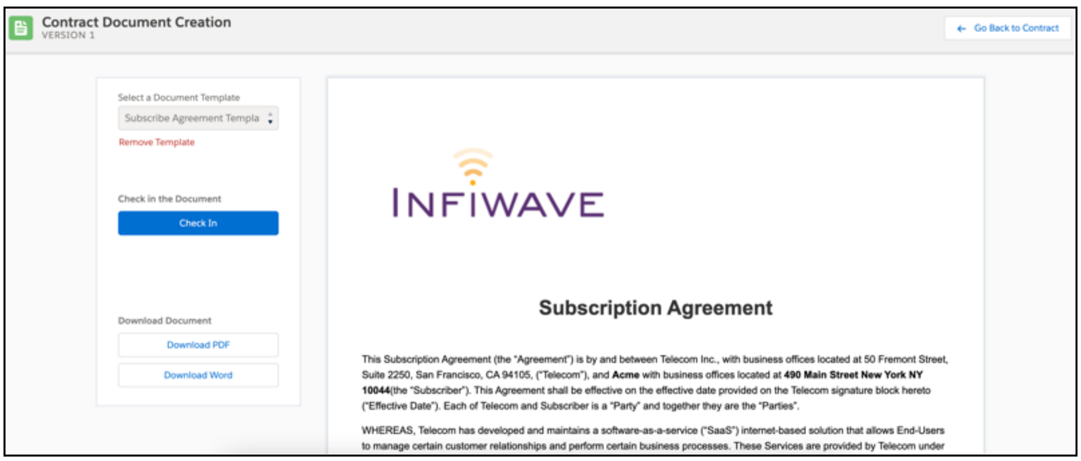


2. Click **Generate**. The Contract Document Creation page is displayed. However, there's no document template attached yet.

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

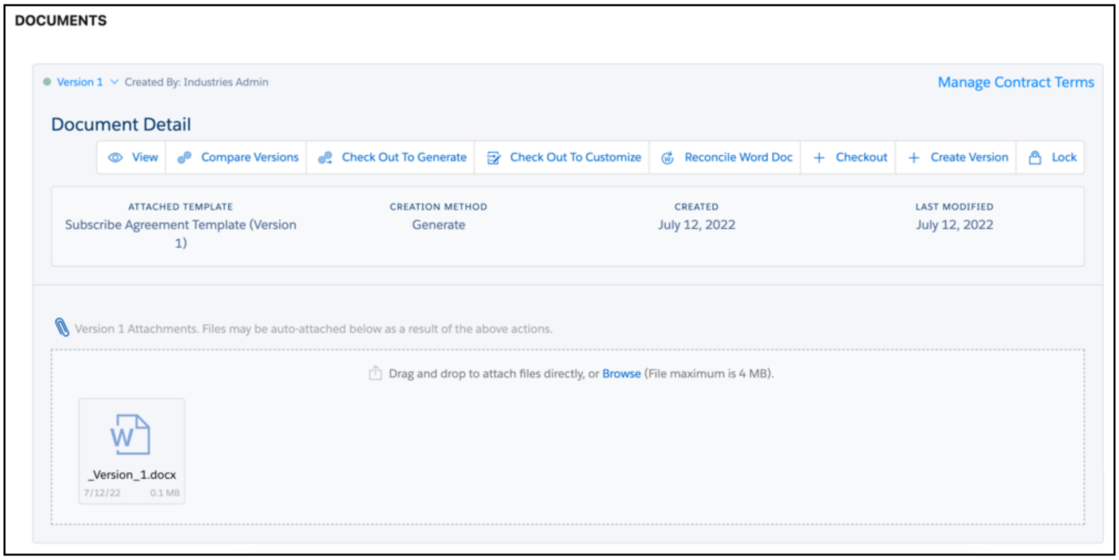


4. Select the **Subscribe Agreement Template (version 1) [Web]** template. The document template is displayed in the pane.



5. Click **Check In**.

6. 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.

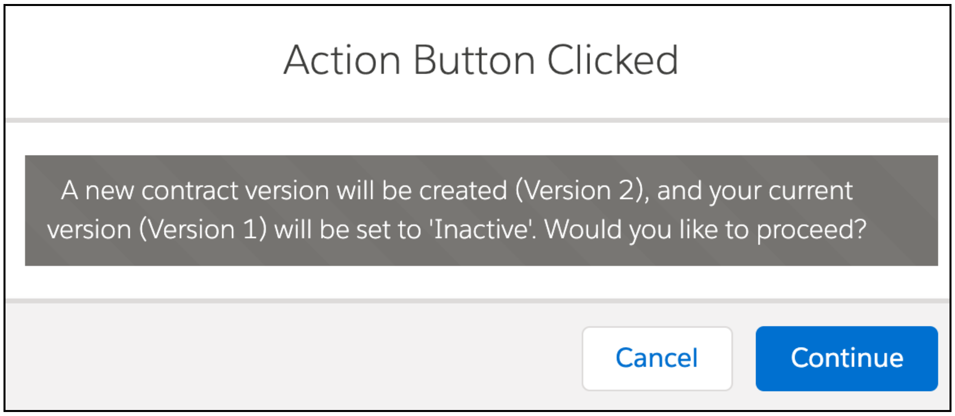


NOTE:
You can perform various contract document operations on each contract document version. These operations are Vlocity Actions. The Contract State Model controls the available actions for each version and who can perform them and when.

Task 4: Customise a generated contract document

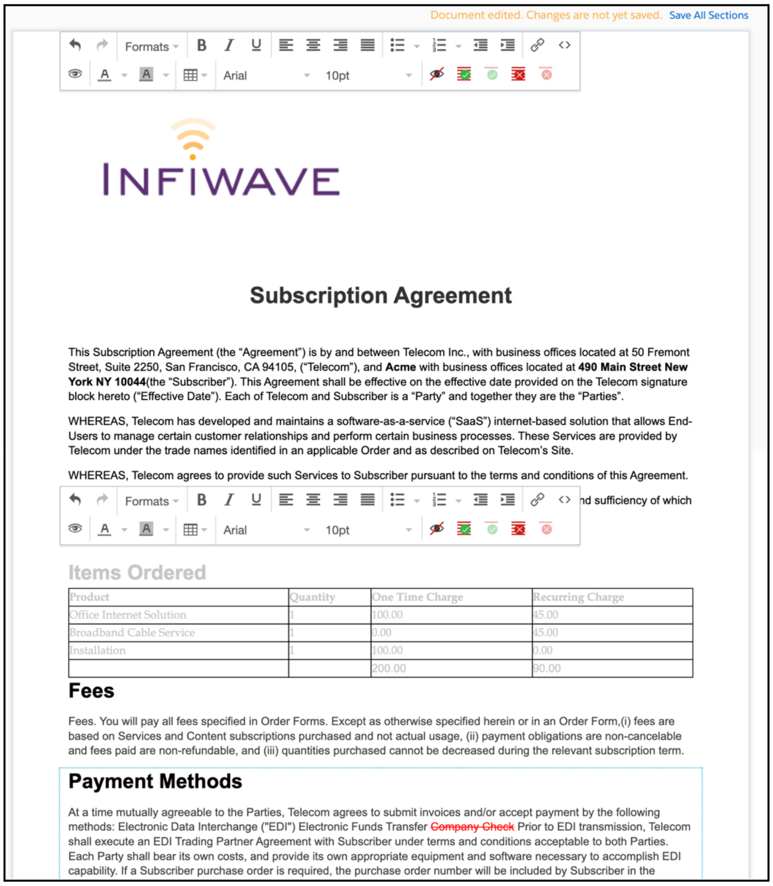
We've generated a contract document, and now it's time to customize it.

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.

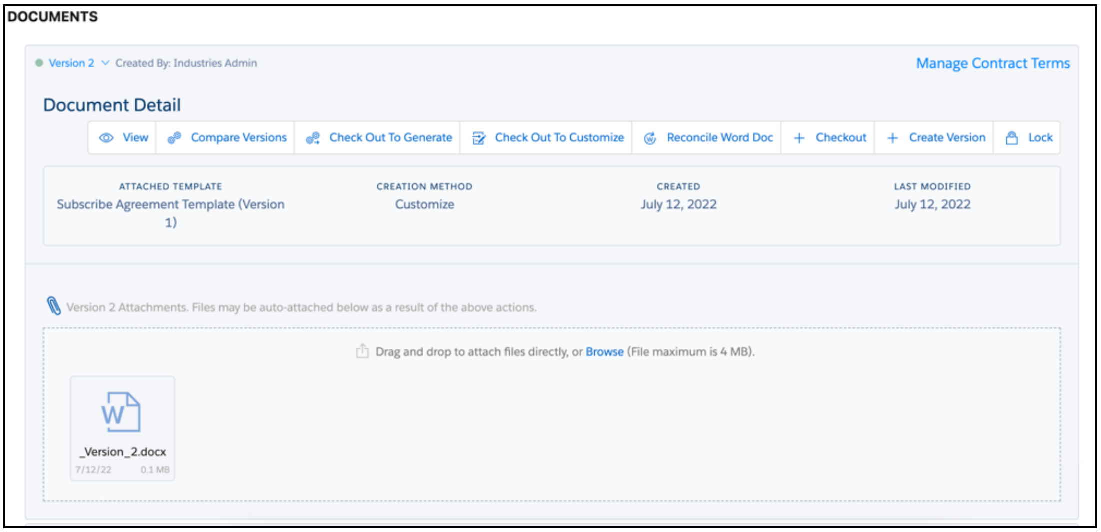
5. Notice the “Document contains redlines” message, and the **Accept and Reject Redlines** buttons. We’re not going to accept the redlines in this version of the contract document, so don’t click these buttons.



6. Click **Save All Sections**.

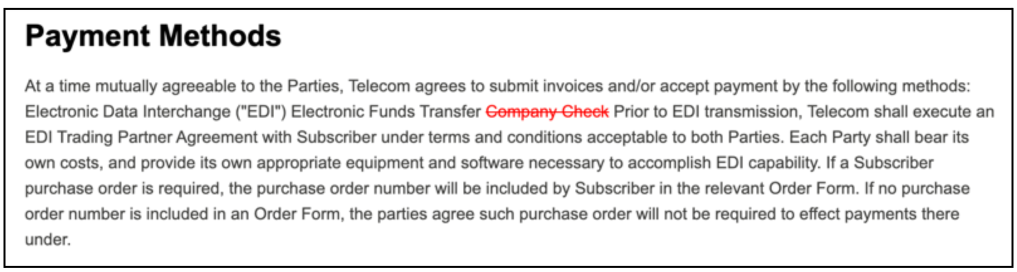
7. Click **Check In**.

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



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.

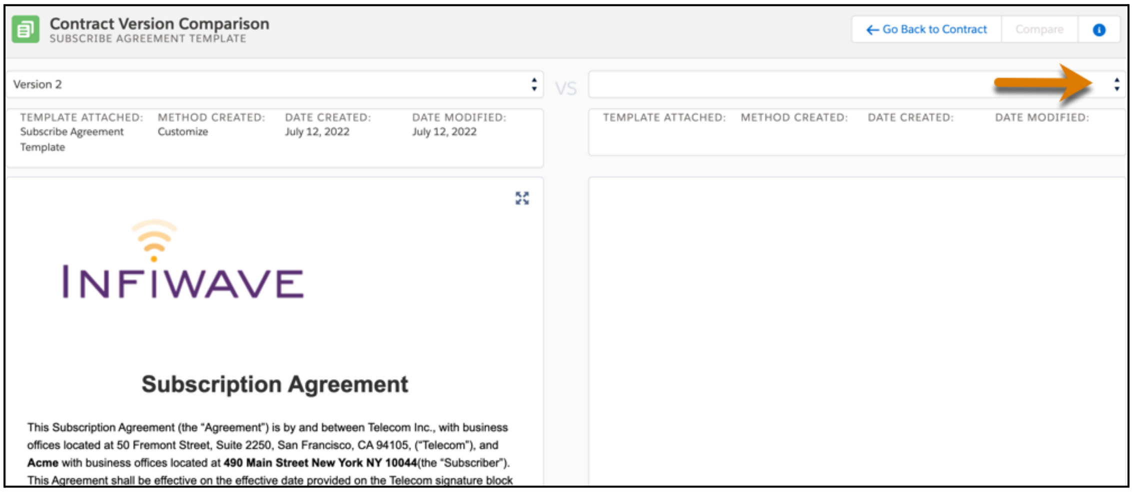


Payment Methods

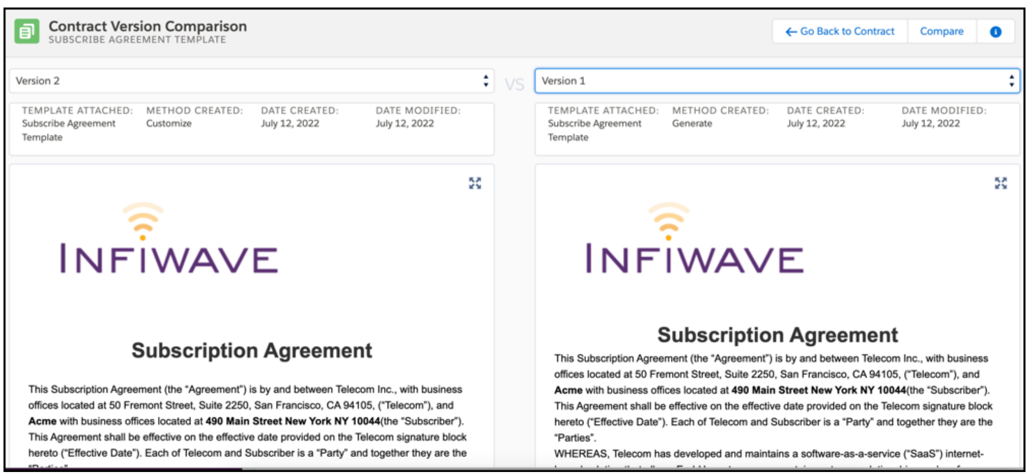
At a time mutually agreeable to the Parties, Telecom agrees to submit invoices and/or accept payment by the following methods: Electronic Data Interchange ("EDI") Electronic Funds Transfer ~~Company Check~~ Prior to EDI transmission, Telecom shall execute an EDI Trading Partner Agreement with Subscriber 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.

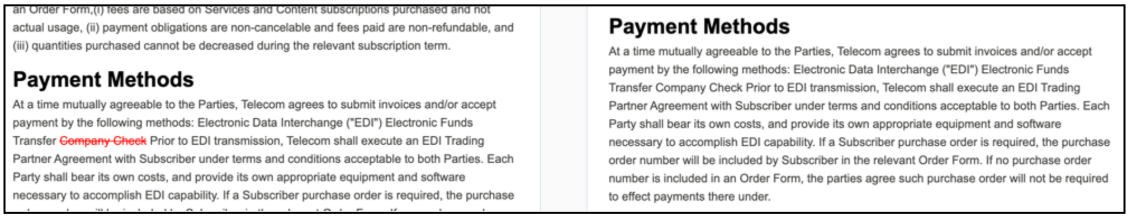


a. Select **Version 1**. Both versions are now visible in the panes.



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.

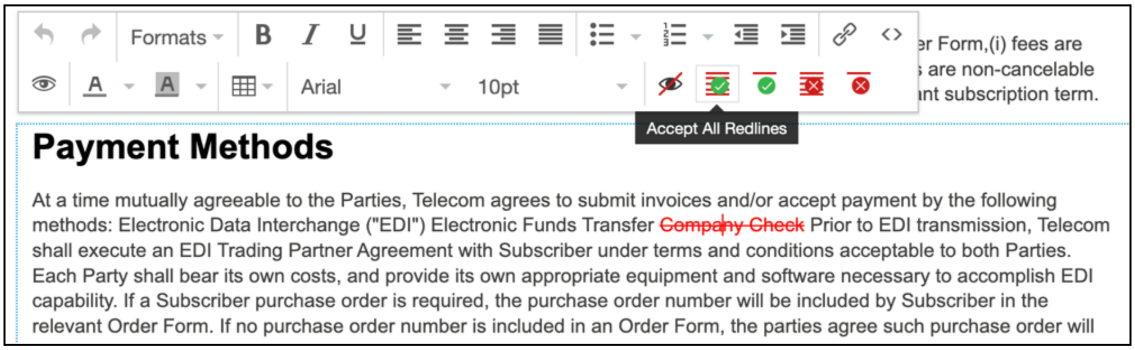


d. Click **Go Back to Contract**. The next steps are to accept the redlines in a new version of the document.

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

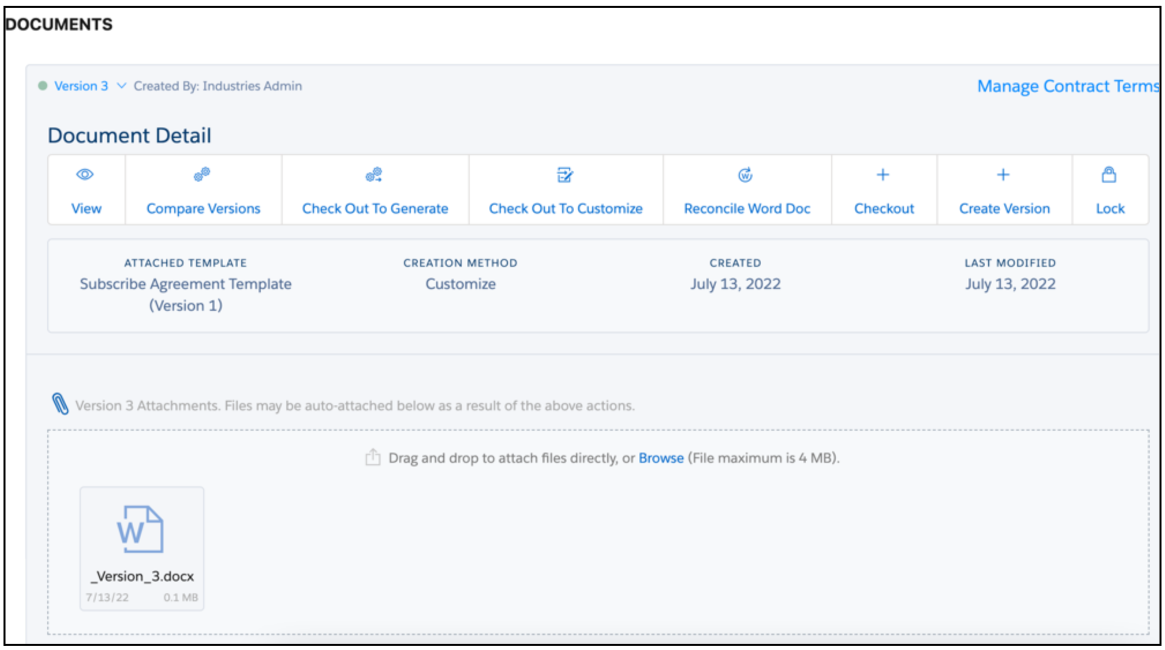
12. Click **Continue**. Version 3 of the contract document is now displayed.

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



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

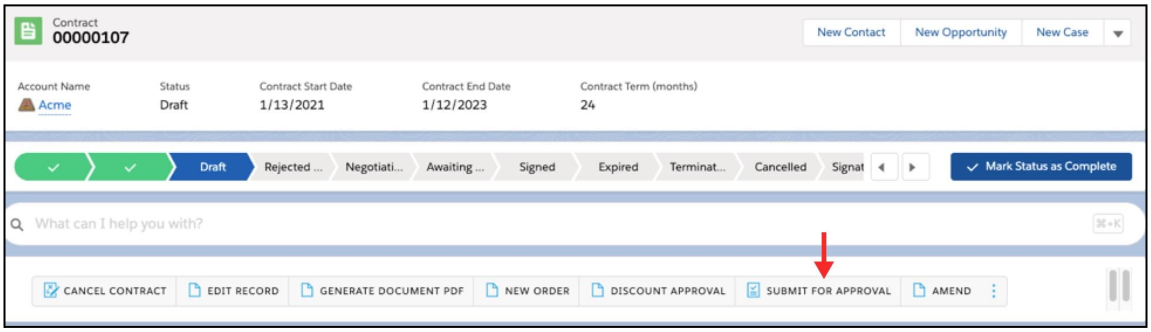
15. Under the Documents tab, **Version 3** of the contract document is now active.



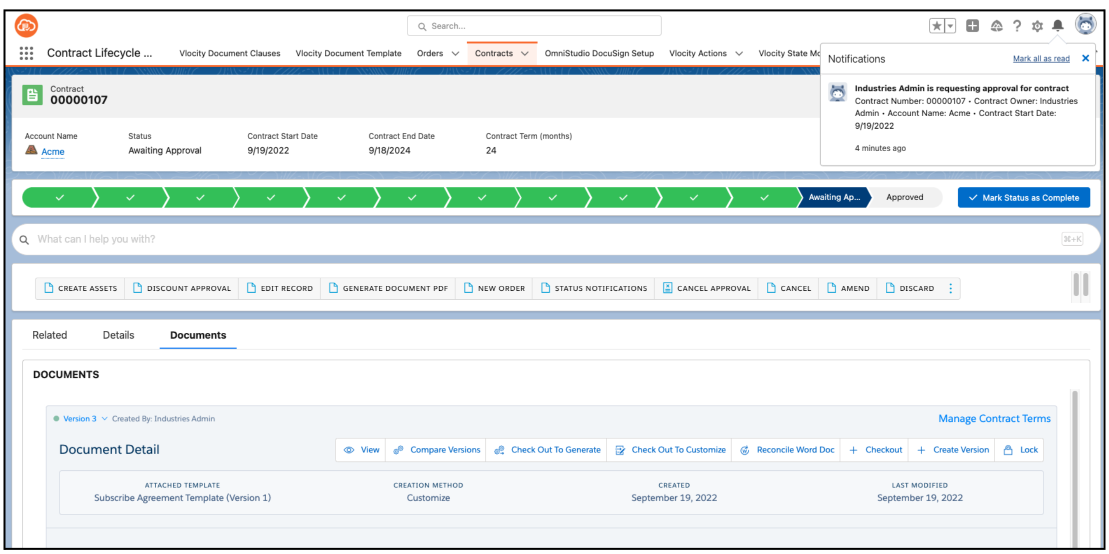
Task 5: Submit a contract document for internal approval

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

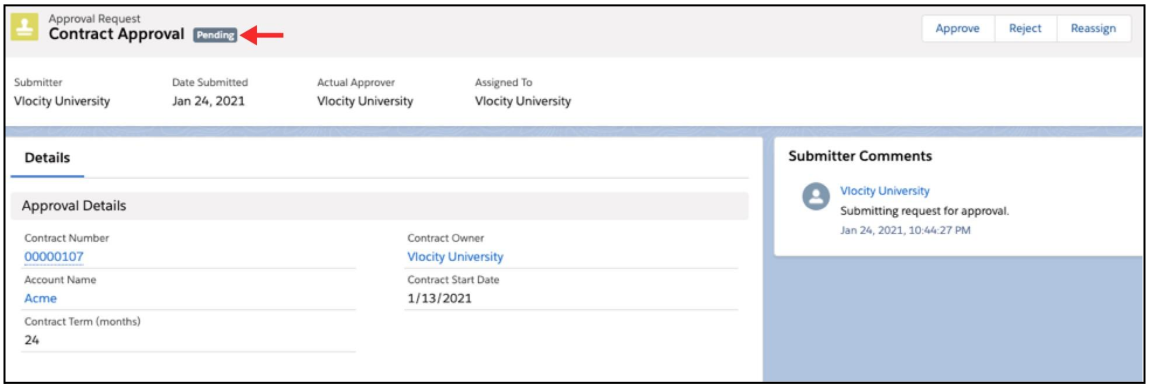
1. Under Contracts Actions, click **SUBMIT FOR APPROVAL**. The contract status changes to Awaiting Approval. You'll also receive a notification email.



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**.



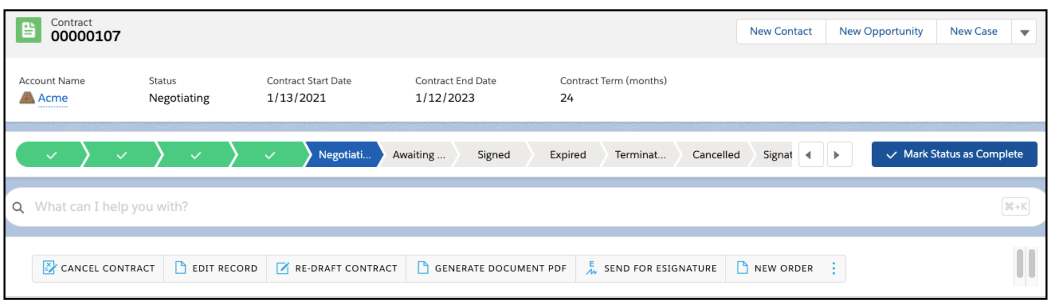
4. Click **Approve**, enter `Approved`, then click **Approve** again. The Contract Approval status changes to Approved.

5. Go back to the Contract page tab and then refresh the page.

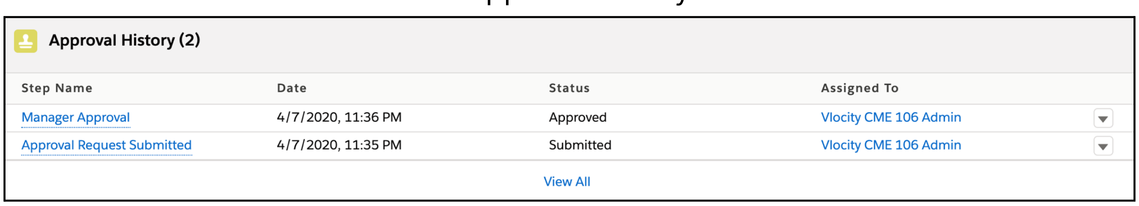
6. Notice the following changes:

    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.



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

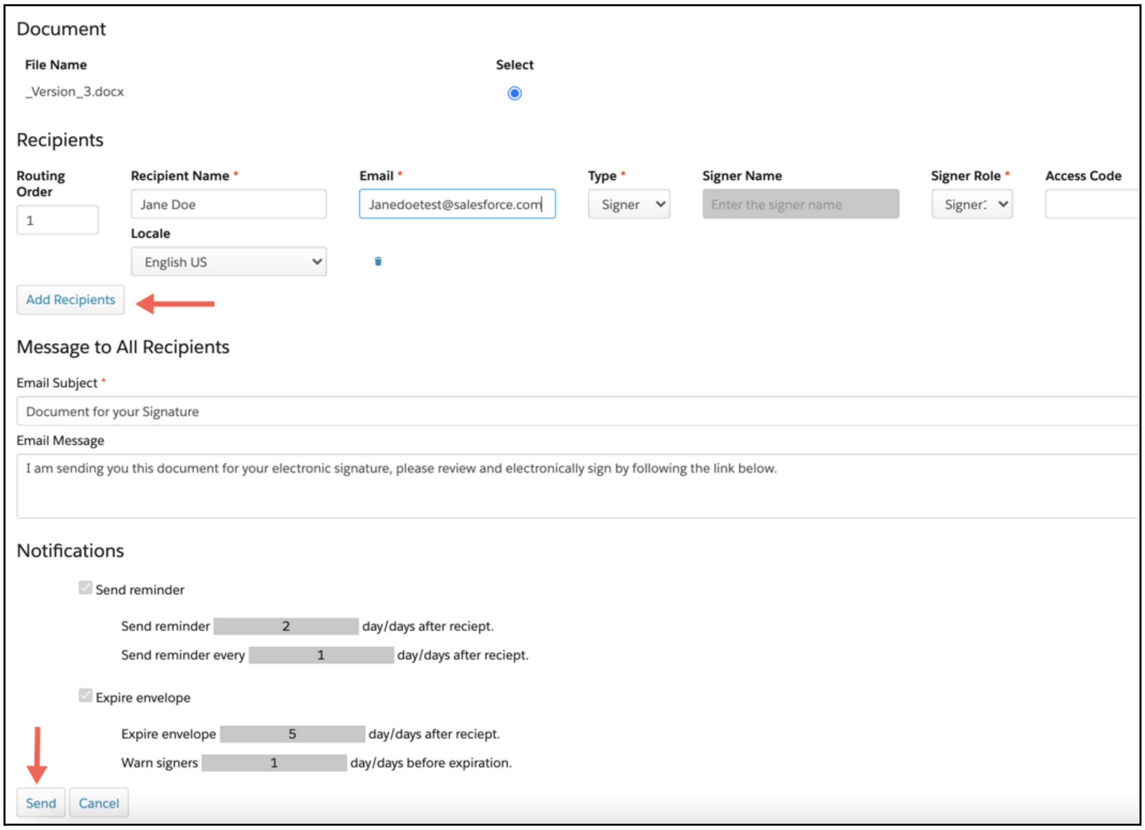


Task 6: Send a contract document for signature

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.

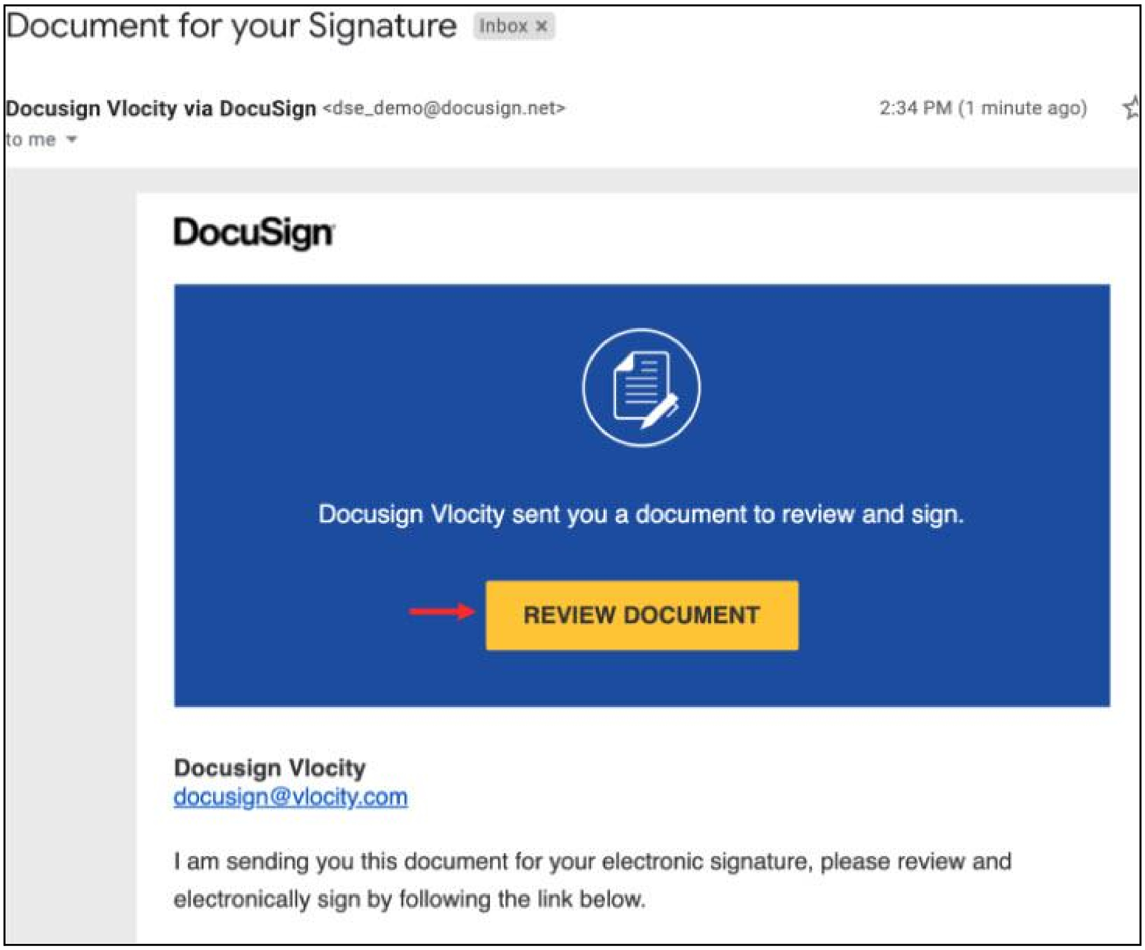
2. Click **Add Recipients**, then enter `your own name` as the **Recipient Name** and `your own email` as the **Recipient Email**.



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).

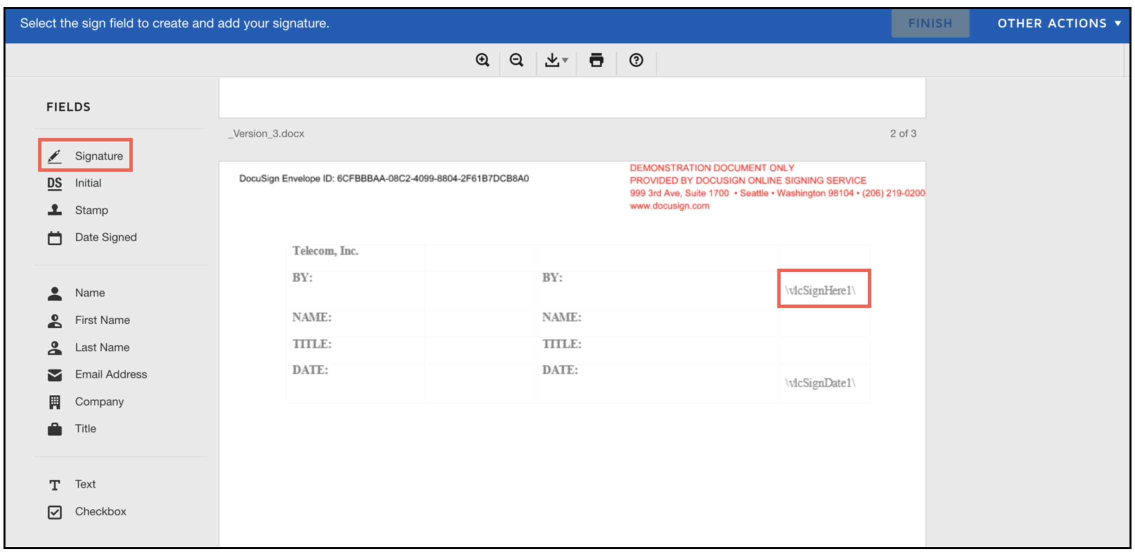
5. Go to your inbox and open the “**Document for your Signature**” email.



6. Click **REVIEW DOCUMENT**.

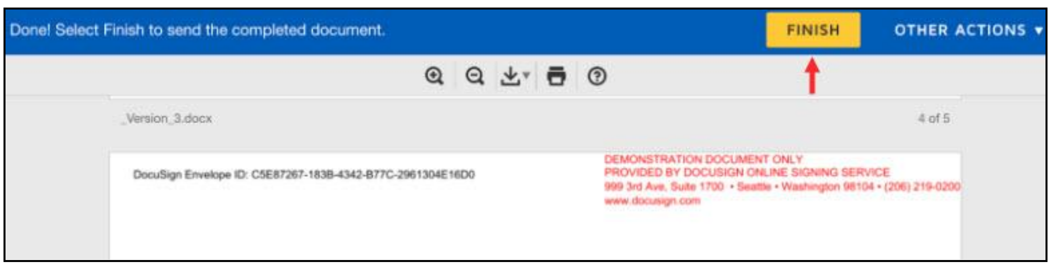
7. Select the **I agree to use electronic records and signatures** checkbox, then click **CONTINUE**.

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

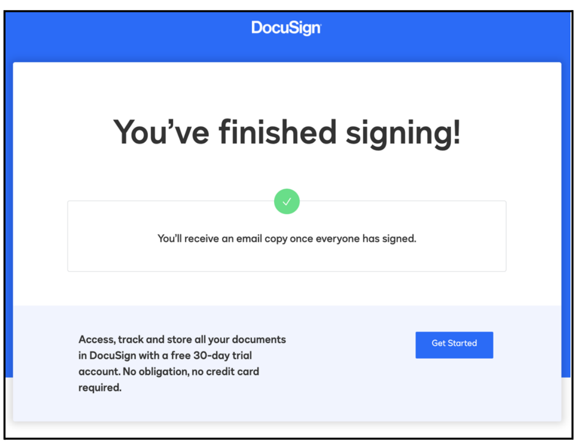


9. Preview your signature and initials, then click **ADOPT AND SIGN**. (If your signature is not there, you will need to create it).

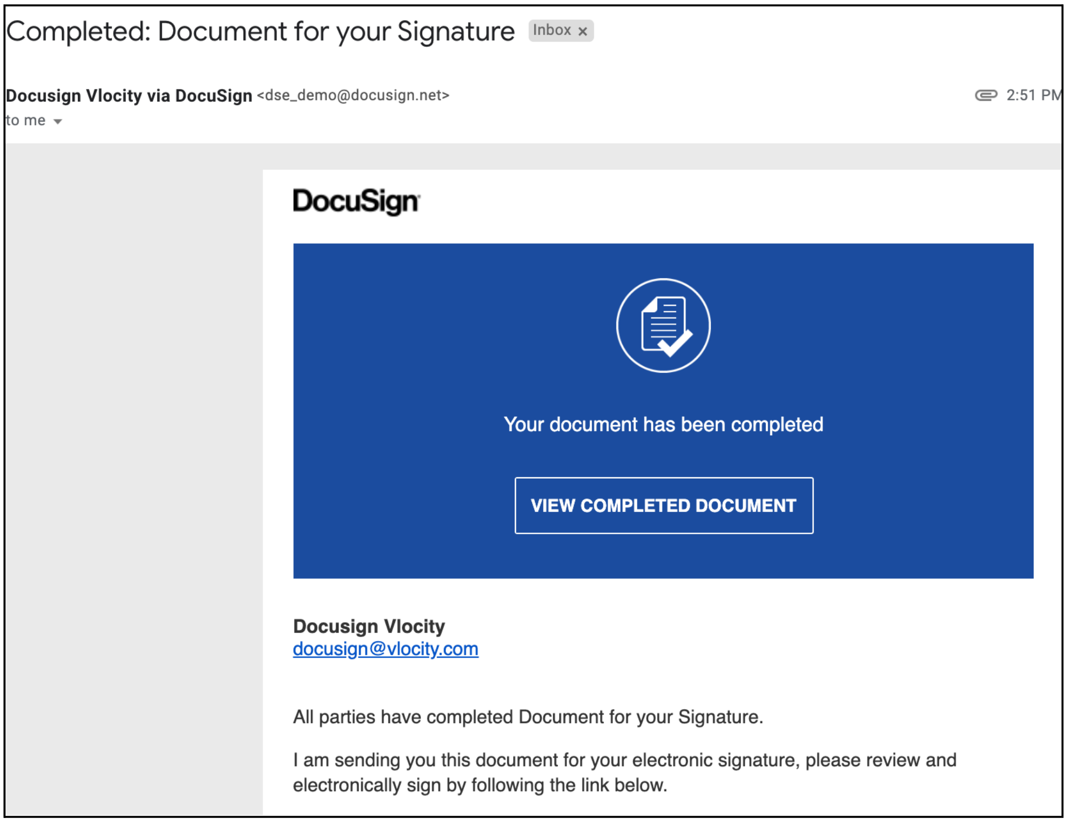
10. Click **FINISH**.



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

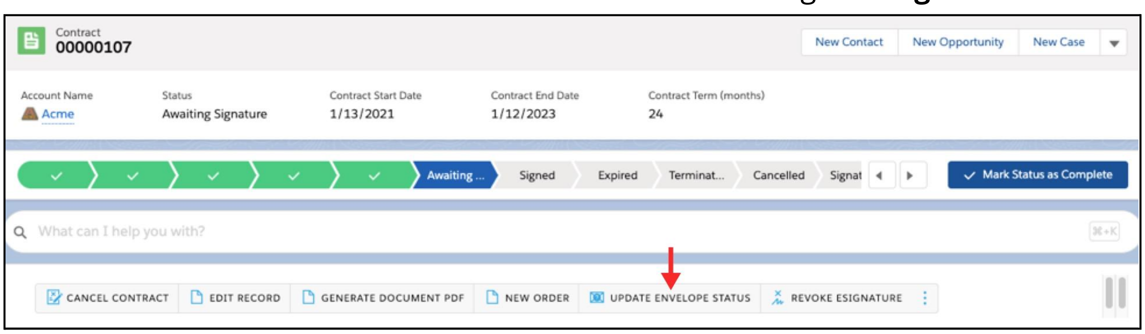


12. You’ll receive a confirmation email, which you can also review.

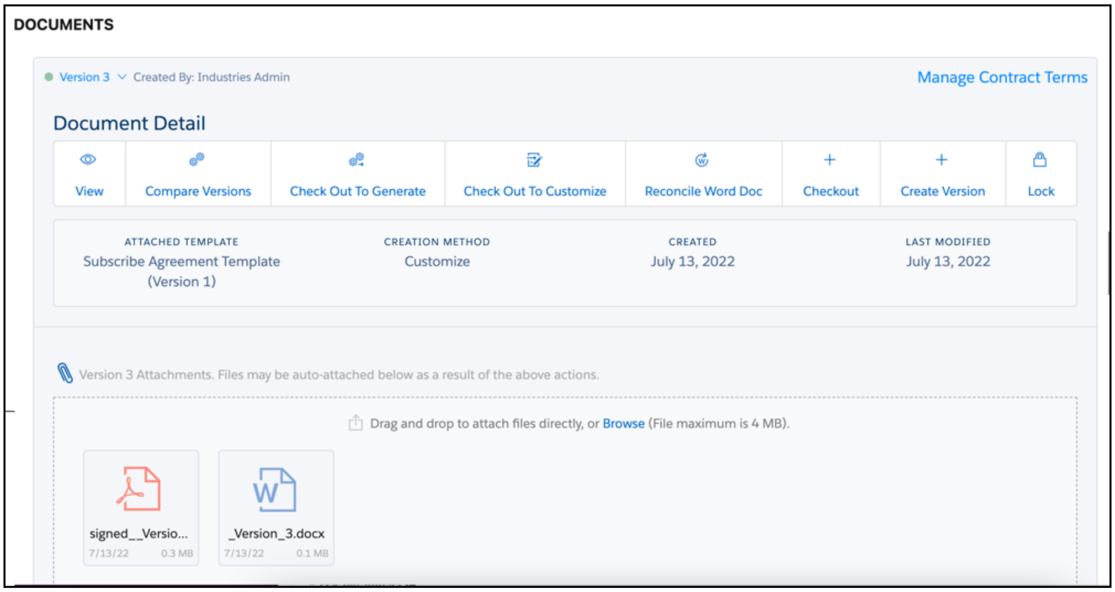


13. Go back to the contract record.

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

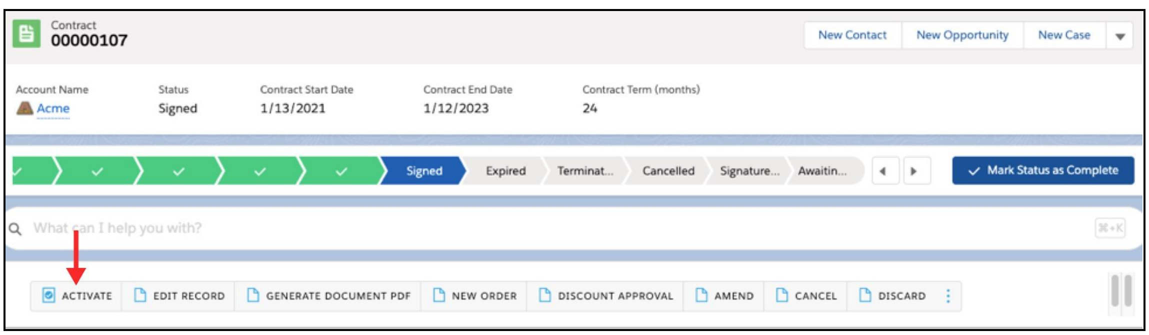


15. Notice the signed document is now attached to **Version 3** of the contract document.



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.