

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. Activate the health care service provider 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)**.

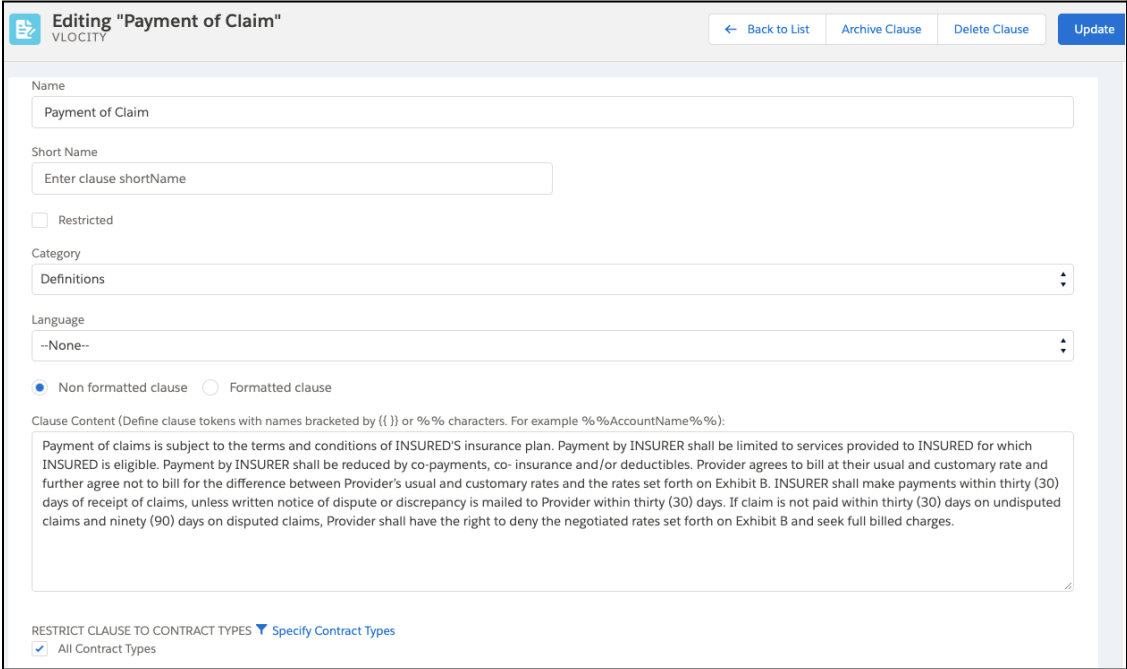


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2. In the **Lightning Navigation bar**, click **Vlocity Document Clauses**. We've added several clauses already.
3. At the top of the page, click **New**.

4. Enter the following information.

Field	Value
Name	Payment of Claim
Category	Definitions
Language	None
Clause Content	Payment of claims is subject to the terms and conditions of INSURED'S insurance plan. Payment by INSURER shall be limited to services provided to INSURED for which INSURED is eligible. Payment by INSURER shall be reduced by co-payments, co- insurance and/or deductibles. Provider agrees to bill at their usual and customary rate and further agree not to bill for the difference between Provider's usual and customary rates and the rates set forth on Exhibit B. INSURER shall make payments within thirty (30) days of receipt of claims, unless written notice of dispute or discrepancy is mailed to Provider within thirty (30) days. If claim is not paid within thirty (30) days on undisputed claims and ninety (90) days on disputed claims, Provider shall have the right to deny the negotiated rates set forth on Exhibit B and seek full billed charges.
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 templates later.



Editing "Payment of Claim"
VLOCITY

← Back to List Archive Clause Delete Clause **Update**

Name
Payment of Claim

Short Name
Enter clause shortName

Restricted

Category
Definitions

Language
--None--

Non formatted clause Formatted clause

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

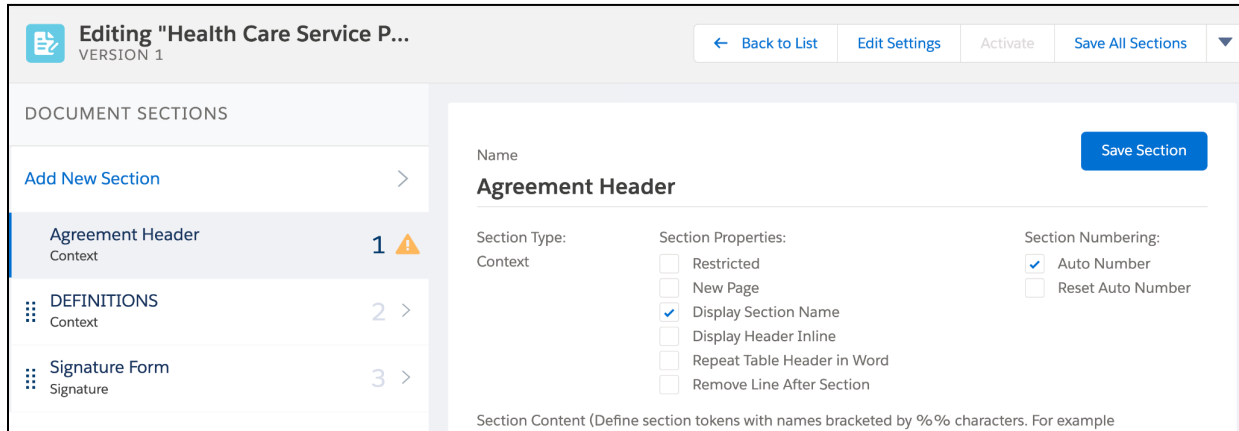
Payment of claims is subject to the terms and conditions of INSURED'S insurance plan. Payment by INSURER shall be limited to services provided to INSURED for which INSURED is eligible. Payment by INSURER shall be reduced by co-payments, co- insurance and/or deductibles. Provider agrees to bill at their usual and customary rate and further agree not to bill for the difference between Provider's usual and customary rates and the rates set forth on Exhibit B. INSURER shall make payments within thirty (30) days of receipt of claims, unless written notice of dispute or discrepancy is mailed to Provider within thirty (30) days. If claim is not paid within thirty (30) days on undisputed claims and ninety (90) days on disputed claims, Provider shall have the right to deny the negotiated rates set forth on Exhibit B and seek full billed charges.

RESTRICT CLAUSE TO CONTRACT TYPES ▼ Specify Contract Types

All Contract Types

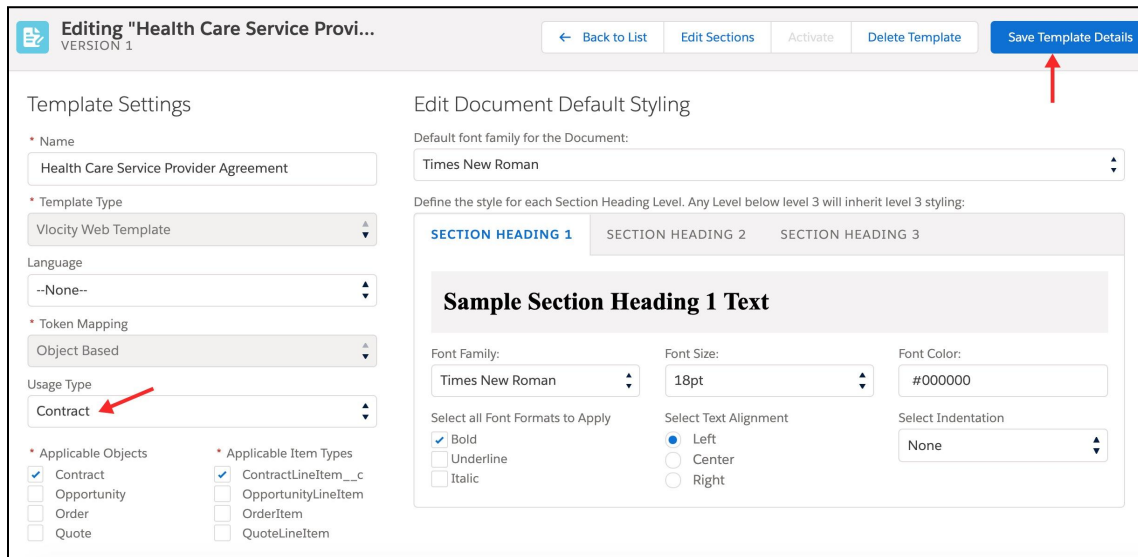
Task 2: Create a Web Document Template

1. In the **Lightning Navigation bar**, click **Vlocity Document Template**.
2. On the Vlocity Document Template page, expand the **Health Care Service Provider Agreement** document template so that **Health Care Service Provider Agreement (Version 1)** displays, then select this version to view the template sections.

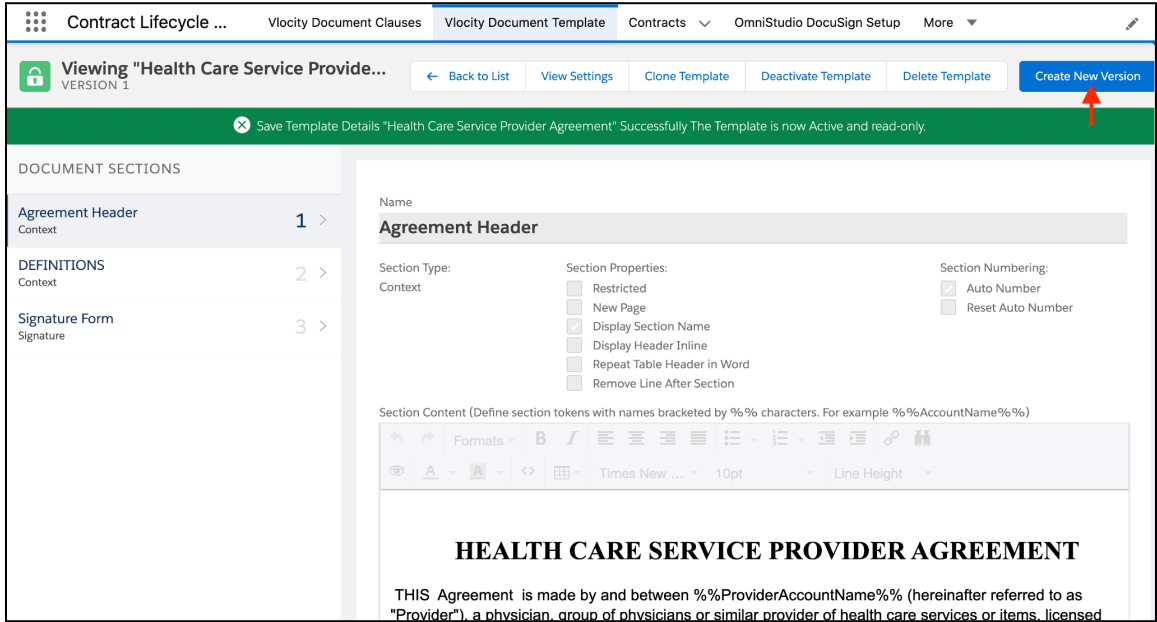


The screenshot shows the 'Editing "Health Care Service P...' interface for 'VERSION 1'. At the top, there are navigation buttons: 'Back to List', 'Edit Settings', 'Activate', and 'Save All Sections'. Below this is a 'DOCUMENT SECTIONS' sidebar with 'Add New Section' and three items: 'Agreement Header' (Context, 1 warning), 'DEFINITIONS' (Context, 2), and 'Signature Form' (Signature, 3). The main area shows the 'Agreement Header' section with a 'Save Section' button. It includes fields for 'Name' (set to 'Agreement Header'), 'Section Type' (Context), and 'Section Properties' (Restricted, New Page, Display Section Name, Display Header Inline, Repeat Table Header in Word, Remove Line After Section). 'Section Numbering' is set to 'Auto Number'. A note at the bottom says 'Section Content (Define section tokens with names bracketed by %% characters. For example

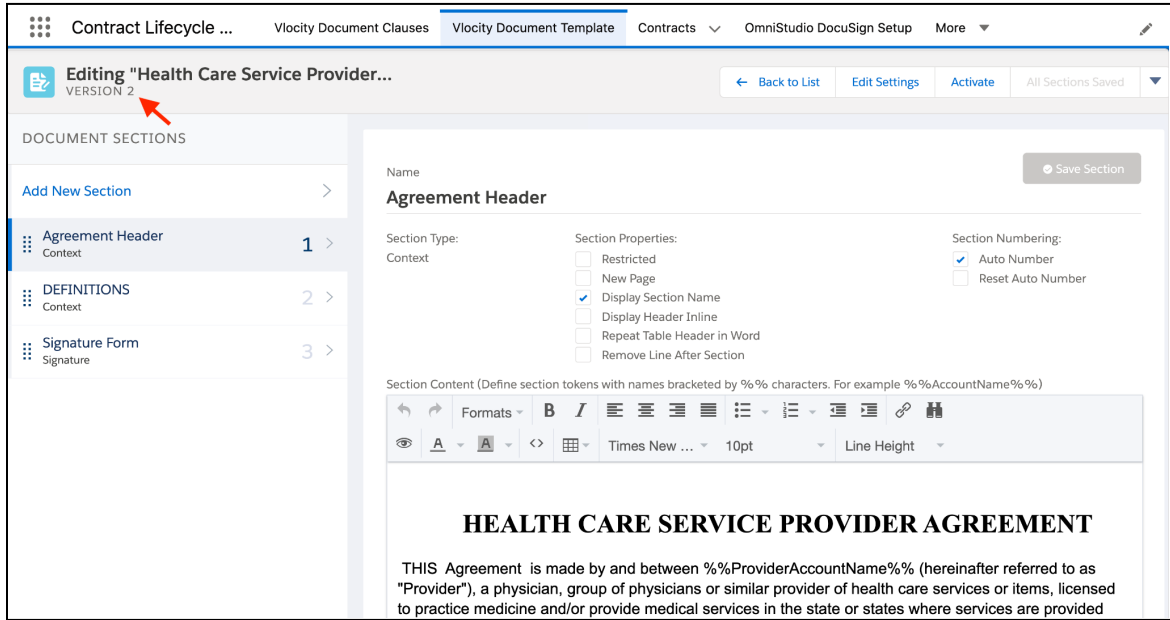
3. Click **Edit Settings** to review the template settings. Notice that **Object Based** is selected in the **Token Mapping** field. Set (or update) **Usage Type** is **Contract** and note that this template applies to the Contract object and Contract Line Items only.



4. Click **Save Template Details**.
5. Click **Activate**. (You may need to click **Edit Sections**, then click **Save All Sections** first.)
6. Click **Yes, Save Template** when you see the confirmation prompt. The template is now active and read-only. To make further changes to the template, we'll create a new version for editing.

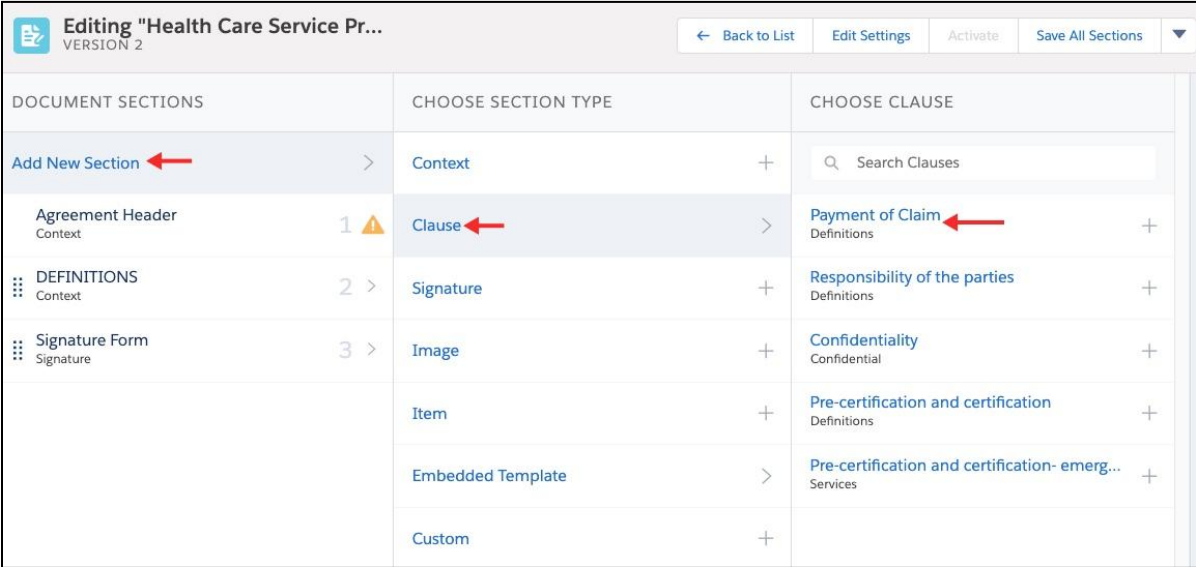


7. Click **Create New Version**. Version 2 of Health Care Service Provider Agreement displays.



Task 3: Add template sections

1. 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 +	Search Clauses
Agreement Header Context 1 ⚠	Clause ←	Payment of Claim ← Definitions +
DEFINITIONS Context 2 >	Signature +	Responsibility of the parties Definitions +
Signature Form Signature 3 >	Image +	Confidentiality Confidential +
	Item +	Pre-certification and certification Definitions +
	Embedded Template >	Pre-certification and certification- emerg... Services +
	Custom +	



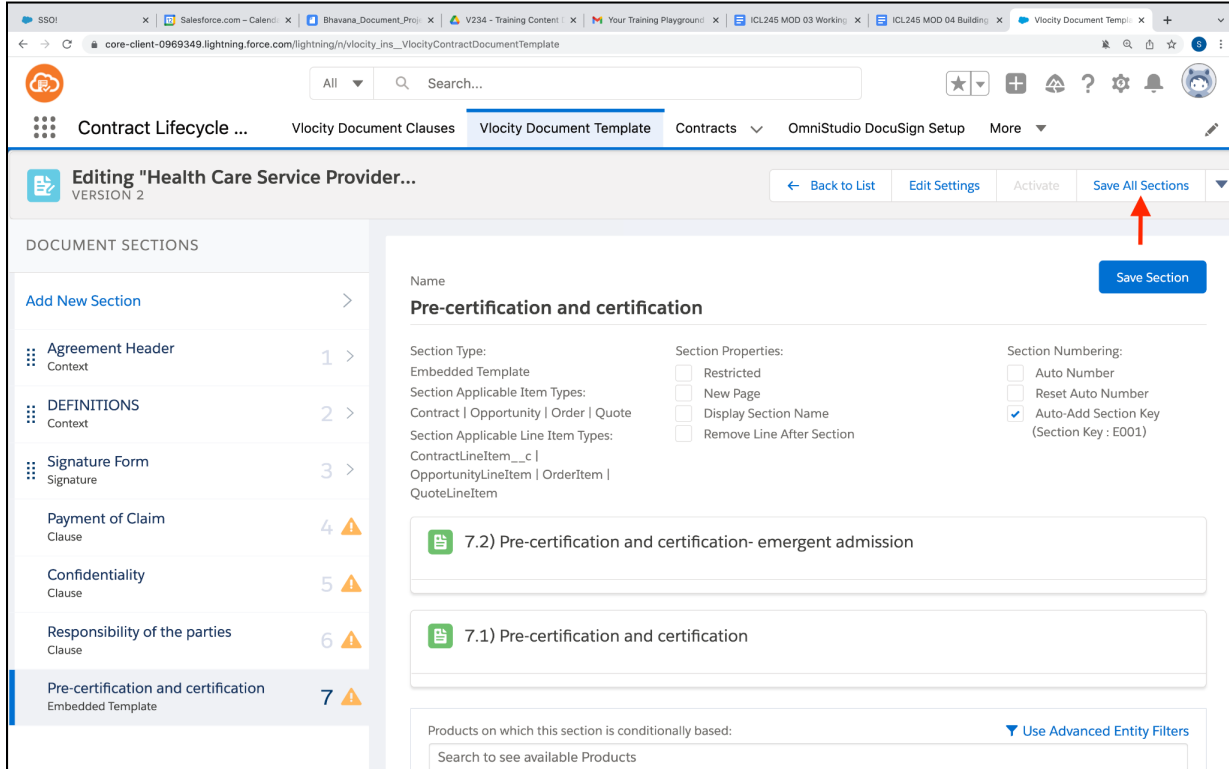
2. Select **Payment of Claim**, which is the clause you created back in Task 1. The clause is added to the template. Notice it appears as the last section in the template.

The screenshot shows the Salesforce document editor interface. At the top, there are navigation tabs: 'Contract Lifecycle ...', 'Vlocity Document Clauses', 'Vlocity Document Template', 'Contracts', and 'More'. Below this, the document title is 'Editing "Health Care Service P...' with 'VERSION 2' underneath. Action buttons include 'Back to List', 'Edit Settings', 'Activate', and 'Save All Sections'. On the left, a 'DOCUMENT SECTIONS' sidebar lists: 'Add New Section', 'Agreement Header' (Context, 1), 'DEFINITIONS' (Context, 2), 'Signature Form' (Signature, 3), and 'Payment of Claim' (Clause, 4) which is highlighted with a red arrow. The main editing area shows the 'Payment of Claim' section with a 'Name' field containing 'Payment of Claim' and a 'Save Section' button. Below the name are three columns of settings: 'Section Type' (Clause), 'Section Properties' (Restricted, New Page, Display Section Name, Repeat Table Header in Word, Remove Line After Section), and 'Section Numbering' (Auto Number, Reset Auto Number). A 'Section Content' field contains the text: 'Payment of claims is subject to the terms and conditions of INSURED'S insurance plan. Payment by INSURER shall be limited to services provided to INSURED for which INSURED is eligible. Payment by INSURER shall be reduced by co-payments, co- insurance and/or deductibles. Provider agrees to bill at their usual and customary rate and further agree not to bill for the difference between Provider's usual and'.

3. Repeat Steps 1 - 2 to add the **Confidentiality** and **Responsibility of the parties** clauses. Your document template should now look as follows:

4. 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.

5. Select **Pre-certification and certification**. This template is added as an embedded template in the Health Care Service Provider Agreement.





6. 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.



NOTE:


We still have one section to add (an Image section for a logo), but first, we'll re-arrange the newly-added sections in the order we want in the template, then edit some of the section names.


7. Use the Drag and Drop button () to re-arrange the template sections as shown below.


 **Editing "Health Care Service Pro...**
VERSION 2


DOCUMENT SECTIONS


[Add New Section](#) >


 **Agreement Header** 1 >
Context


 **DEFINITIONS** 2 >
Context

 **Pre-certification and certification** 3 >
Embedded Template

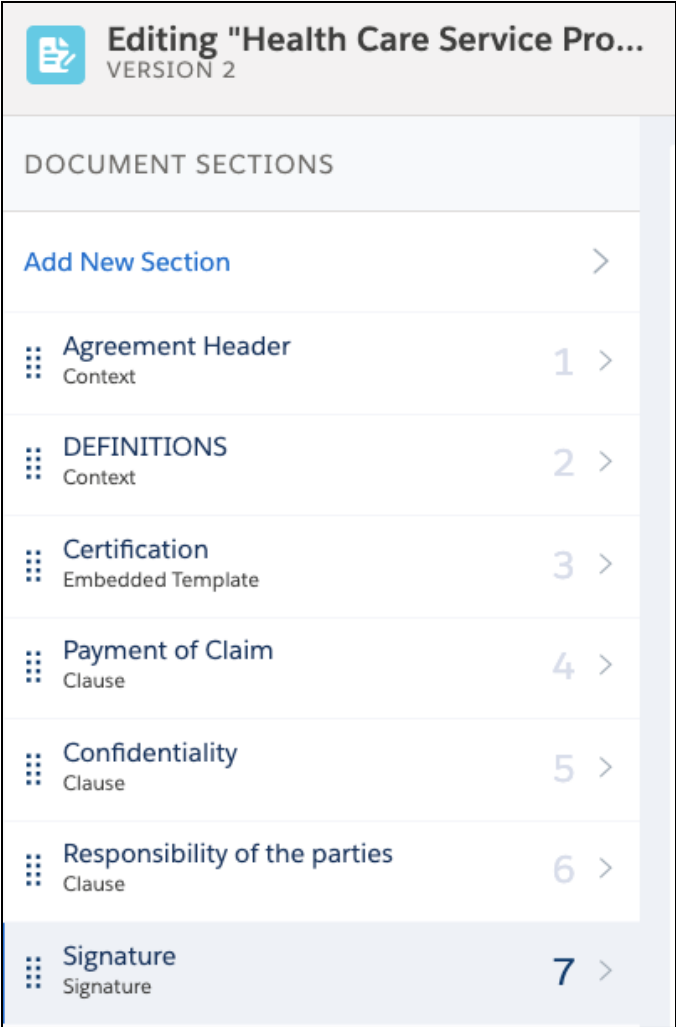
 **Payment of Claim** 4 >
Clause

 **Confidentiality** 5 >
Clause

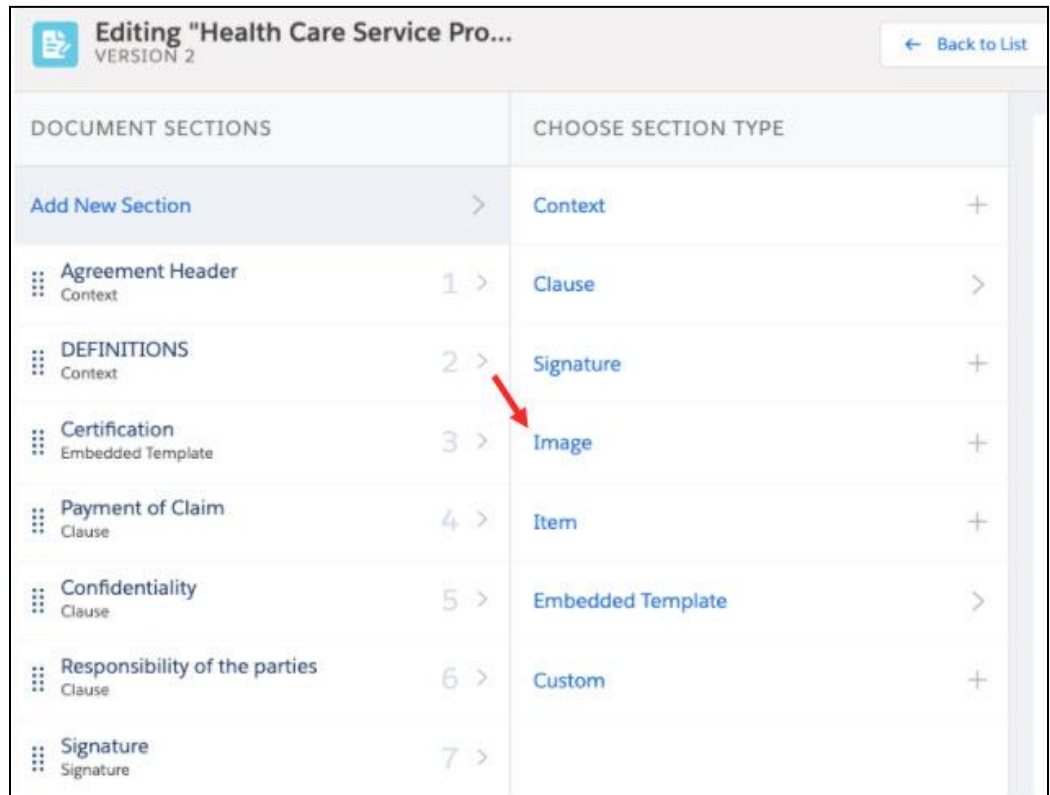
 **Responsibility of the parties** 6 >
Clause

 **Signature Form** 7 >
Signature

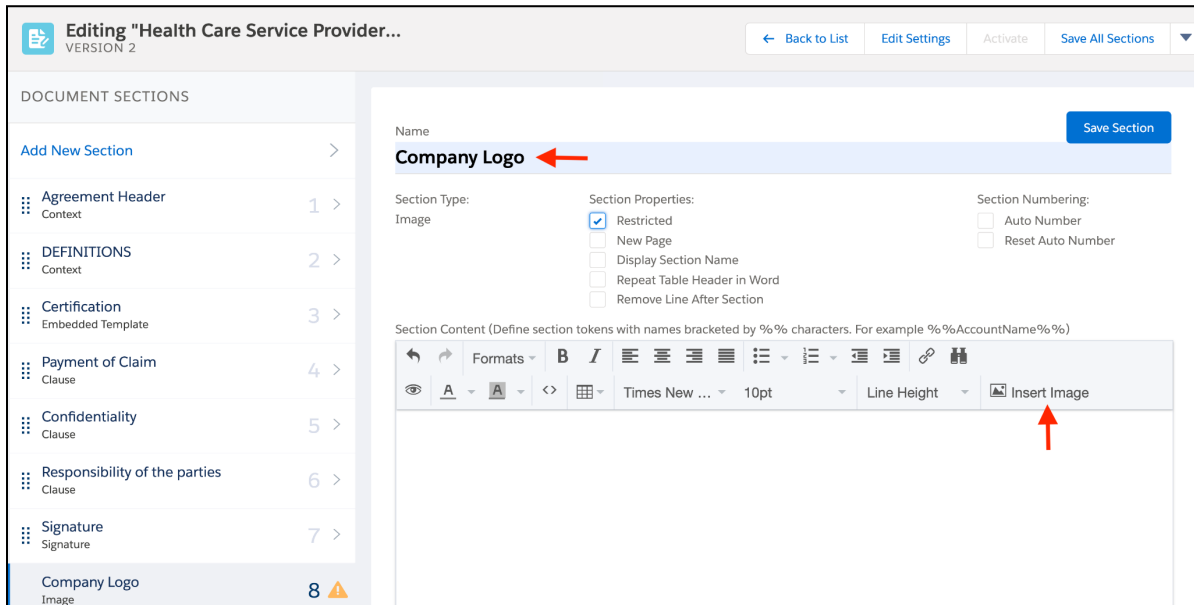
- 8. Now that they're in the correct sequence, let's rename a few of the sections:
 - a. Select **Pre-certification and certification**, rename it to *Certification*, then click **Save Section**.
 - b. Select **Signature Form**, rename it to *Signature*, then click **Save Section**.
 - c. Your template should now look as shown below.



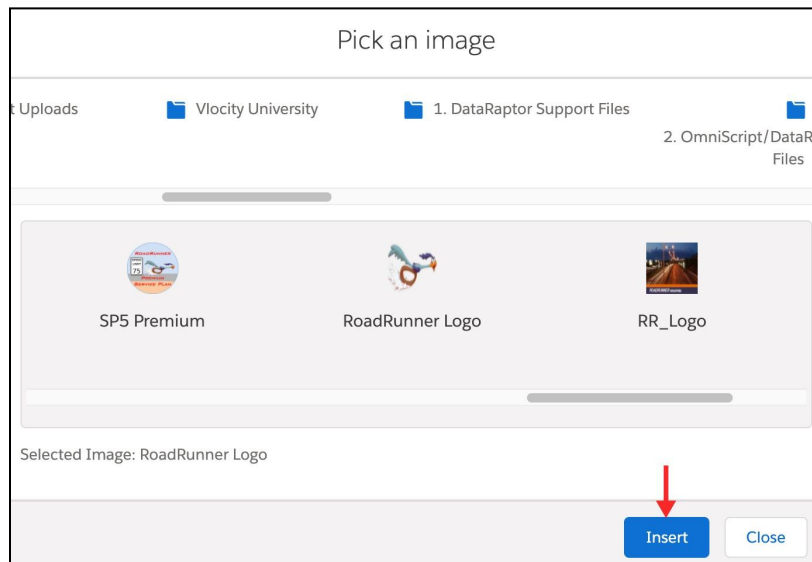
9. Add an Image section for your Company Logo:
 - a. Click **Add New Section**, then click **Image**.



- b. Enter `Company Logo` as the section name.
 - c. Under Section Properties, select **Restricted**. Restricted clauses cannot be edited unless the user profile has the appropriate access.

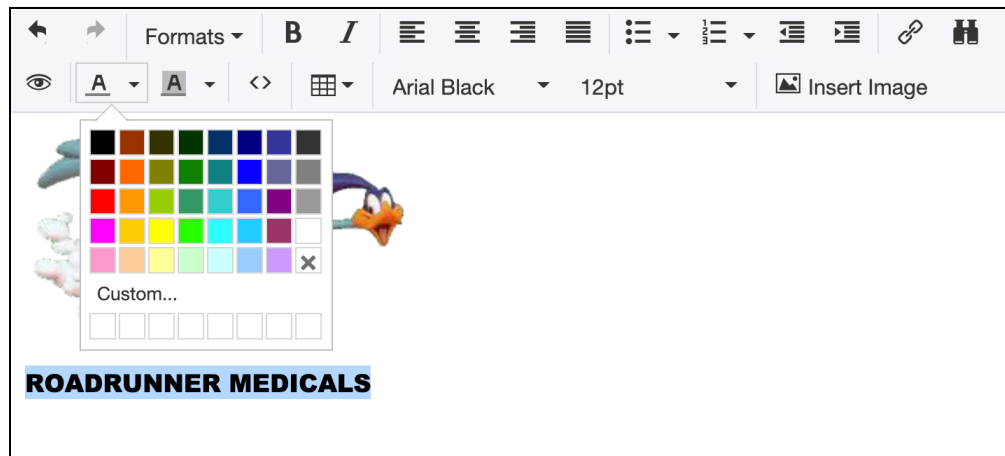


- d. In the editing toolbar, click **Insert Image**.
- e. In the **Pick an image** dialog, click the **Vlocity University** folder and select the **RoadRunner Logo**.



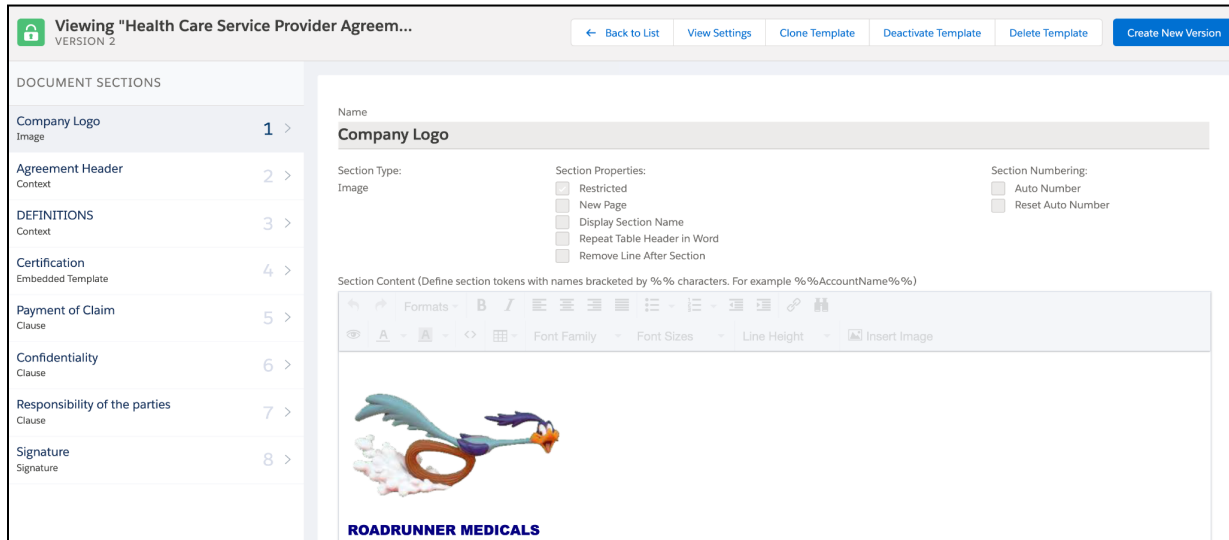
- f. Click **Insert**.

- g. Position your cursor in the table cell after the image, and press **Enter**.
- h. Using the text color menu, set the **text color** to a color of your choosing.
- i. Using the font menu, set the font to **Arial Black**.
- j. Using the font size menu, set the font size to **12 pt**.
- k. Enter **ROADRUNNER MEDICALS**.



- l. Click **Save Section**.

10. Drag the **Company Logo** section to the top of the section list, so that it's the first section in the template.



11. Confirm that you have all the sections you need in this template, and they're in the correct sequence.

12. Select the section properties for the following four sections:

Section	Properties You Must Select
Payment of Claim	Restricted, Display Section Name, Auto Number
Certification	Display Section Name, Auto Number
Confidentiality	Display Section Name, Auto Number
Responsibility of the parties	Display Section Name, Auto Number

13. Click **Save All Sections**.

Task 4: Activate the Health Care Service Provider 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.
3. Click **Back to List**. Version 2 of the Health Care Service Provider Agreement template is now active.

<input type="checkbox"/>	NAME	TEMPLATE TYPE	LANGUAGE	APPLICABLE OBJECTS	MAPPING TYPE	STATUS	LAST MODIFIED DATE	ACTIVE
>	Fee Schedule Agr...	Microsoft Word .DOCX T...			JSON Based	Active	Dec 7, 2022	<input checked="" type="checkbox"/>
▼	Health Care Servi...	Vlocity Web Template		Contract	Object Based	Archived	Dec 7, 2022	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Health Care Servic					Archived	Modified on Dec 7, 202...	<input type="checkbox"/>
<input type="checkbox"/>	Health Care Servic					Active	Modified on Dec 7, 202...	<input checked="" type="checkbox"/>

The template is now available for generating documents under Contracts.