

# 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](mailto: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. Customize a generated contract document
5. Submit a contract for internal approval
6. Send a contract document for eSignature

**Time:** 30 mins

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**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.

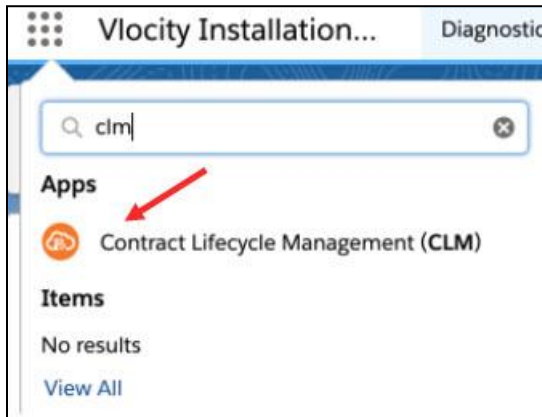
**For more information, see:**

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

## Task 1: Create a contract

Contracts can be integrated within the sales process. In this task, we'll view a contract and its various screens.

1. Using the **Lightning App Launcher**  , navigate to **Contract Lifecycle Management (CLM)**.



2. In the **Lightning Navigation bar**, click **Contracts**.
3. In the Contracts window, click **New**. Select **Contract** as the record type and click **Next** and provide the below information:

Field	Value
Language	None
Account Name	Acme
Contract Start Date	[Today]
Contract Term	12

**New Contract: Contract**

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**Contract Information**

Contract Number	* Status Draft
* Account Name Acme	* Contract Start Date 10/4/2022
Price Book Search Price Books...	Language --None--
Producer Search Contacts...	* Contract Term (months) 12

4. Click **Save**.
5. Review the main sections of the Contract page.



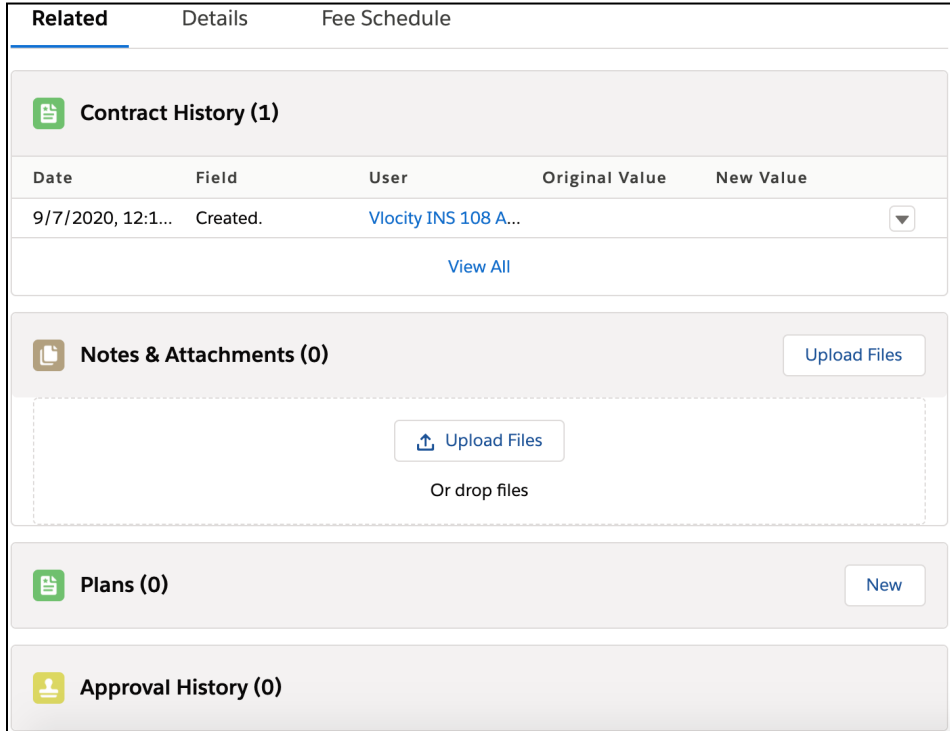
Task 2: Review the contract

- 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 shows a Salesforce Contract record for contract number 00000102. The header section includes the account name 'Acme', status 'Draft', start date '8/23/2020', end date '8/22/2021', and term '12' months. Action buttons for 'New Opportunity', 'New Lead', 'Edit', 'Delete', and 'Change Owner' are visible. Below the header is a 'CONTRACT STATES' section with a progress bar showing 'Draft' as the current state, followed by 'Awaiting ...', 'Approved', 'Cancelled', and 'Expired'. A 'Mark Status as Complete' button is also present. The 'TABS' section includes 'Details', 'Related', and 'Fee Schedule'. The 'Details' tab is active, showing fields for Contract Number (00000102), Account Name (Acme), Status (Draft), and Contract Start Date (8/23/2020). Action buttons for 'CANCEL CONTRACT', 'CHANGE CONTACT', and 'XOMEXECUTE CUSTOM OMNISCRIP' are also shown. A 'Rules Log' section on the right indicates 'No rules logged.'

- 2. The **Contract States** represents the various states that the contract goes through in its lifecycle. These states are defined using the Vlocity State Model.

- Under the **Related** tab, view the Contract History, contract Approval History, as well as documents attached in Notes & Attachments.

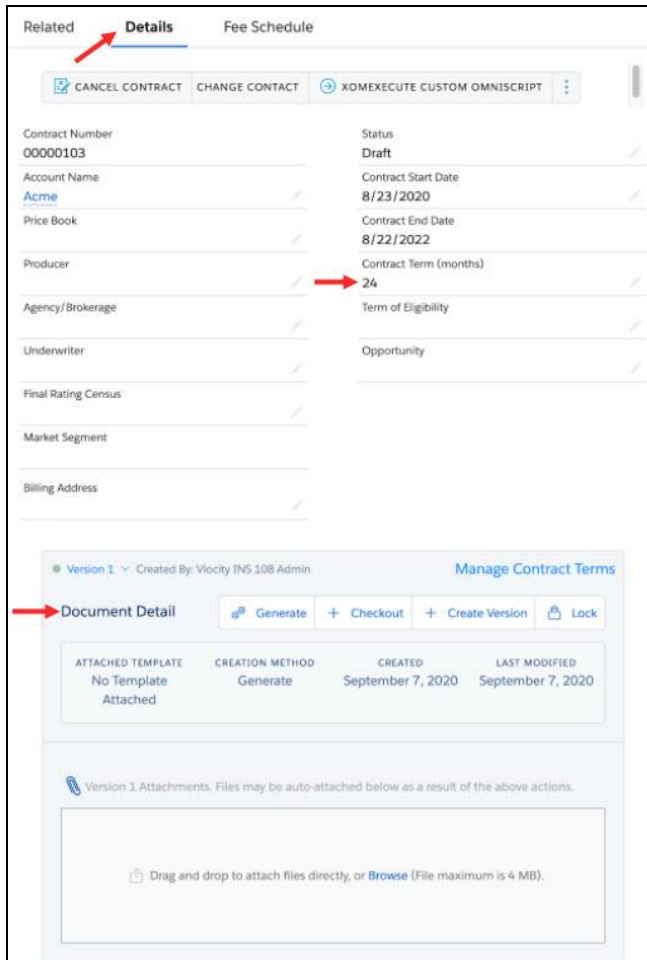


The screenshot shows the 'Related' tab interface with the following sections:

- Contract History (1)**: A table with columns: Date, Field, User, Original Value, New Value. One row is visible: 9/7/2020, 12:1... Created. Vlocity INS 108 A... A 'View All' link is below the table.
- Notes & Attachments (0)**: Includes an 'Upload Files' button and a dashed box with an 'Upload Files' button and 'Or drop files' text.
- Plans (0)**: Includes a 'New' button.
- Approval History (0)**: No visible content.

- Select the **Details** tab.
- Notice the contract details: **Contract Number**, **Account Name**, **Status**, **Contract Start Date**, **Contract End Date** and **Contract Term**. Also, notice the contract actions. These actions are displayed as buttons. Selecting the row of vertical dots allows the user to view additional Contract Actions.

6. Edit **Contract Term (months)** and update the value to 24. Click **Save**.  
Under the Details tab, scroll to the **Document Detail** section to view and manage the contract document versions and their attached files.



The screenshot shows the 'Details' tab of a contract record. The 'Contract Term (months)' field is set to 24. Below the details, the 'Document Detail' section is visible, showing a table of document versions and an attachment area.

ATTACHED TEMPLATE	CREATION METHOD	CREATED	LAST MODIFIED
No Template Attached	Generate	September 7, 2020	September 7, 2020

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




The screenshot shows the contract header with the following fields:

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
Acme	Draft	8/23/2020	8/22/2022	24



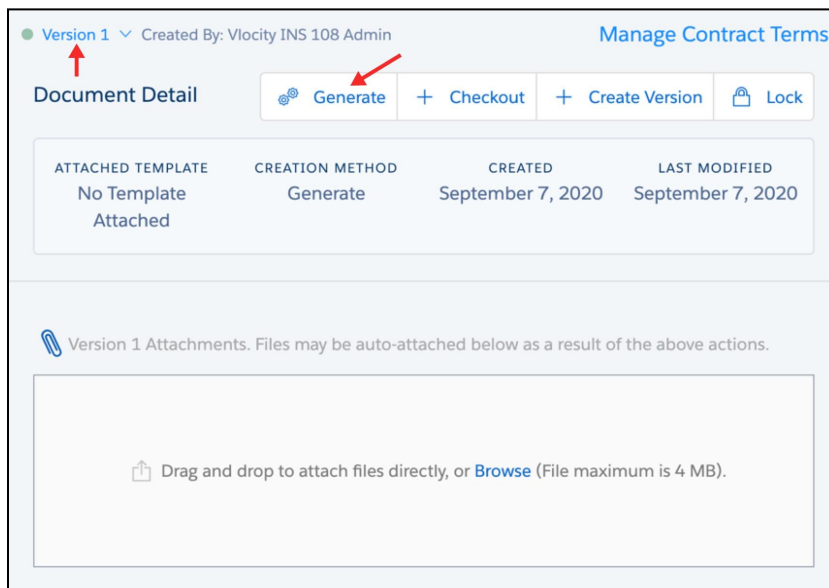
### Task 3: Generate a contract document

Now that we've created a contract, the next step is to generate a contract document based on one of the active document templates. In the Document Detail section, notice the contract document actions, which are distinct from the contract actions. We'll work with these contract document actions during the next tasks.



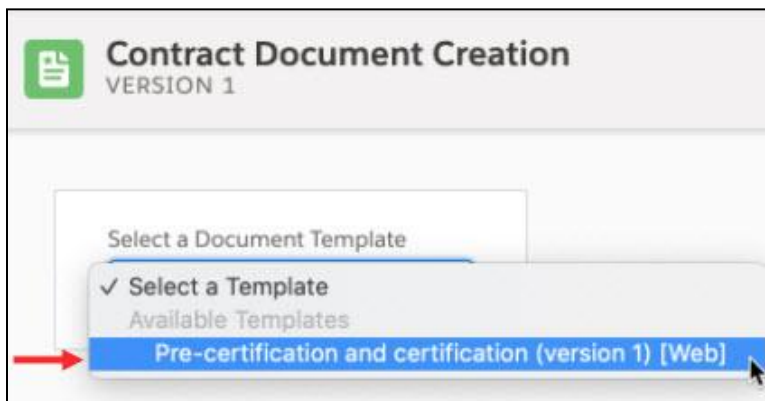
**NOTE:**  
You can perform various contract document operations on each contract document version. These operations are Vlocity Actions. The Contract State Model controls the available operations for each version and who can perform them and when.

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

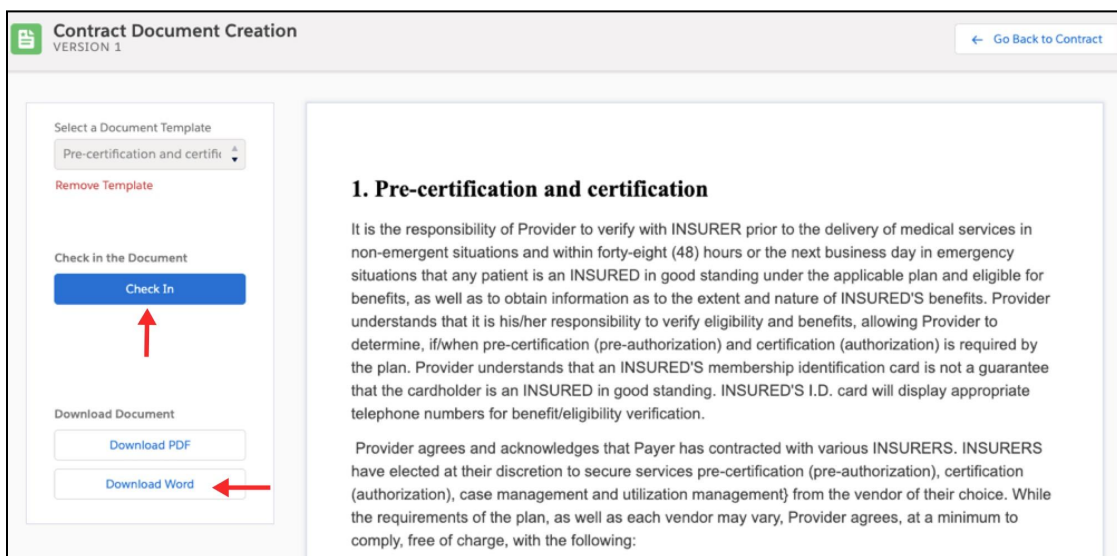


- Click **Generate**. The Contract Document Creation page is displayed. However, there's no document template attached yet.

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











5. Select the **Pre-certification and certification (version 1) [Web]** template. The document template is displayed in the pane.




6. Click **Download Word** to download the generated document to your computer so that you can open it using Microsoft Word.
7. Click **Check In**. Under the Document Detail section, **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.


Version 1 ▼ Created By: Vlocity INS 108 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
Pre-certification and certification (Version 1)	Generate	September 7, 2020	September 7, 2020

 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).

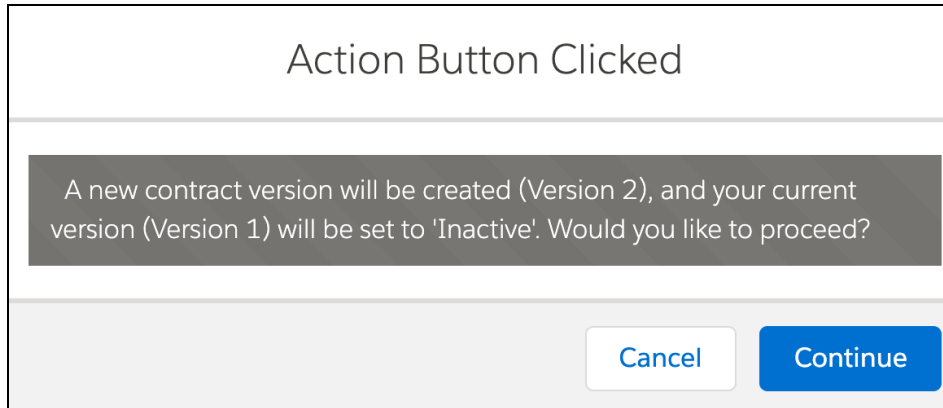
  
00000103\_Vers...  
9/7/20 83.4 KB



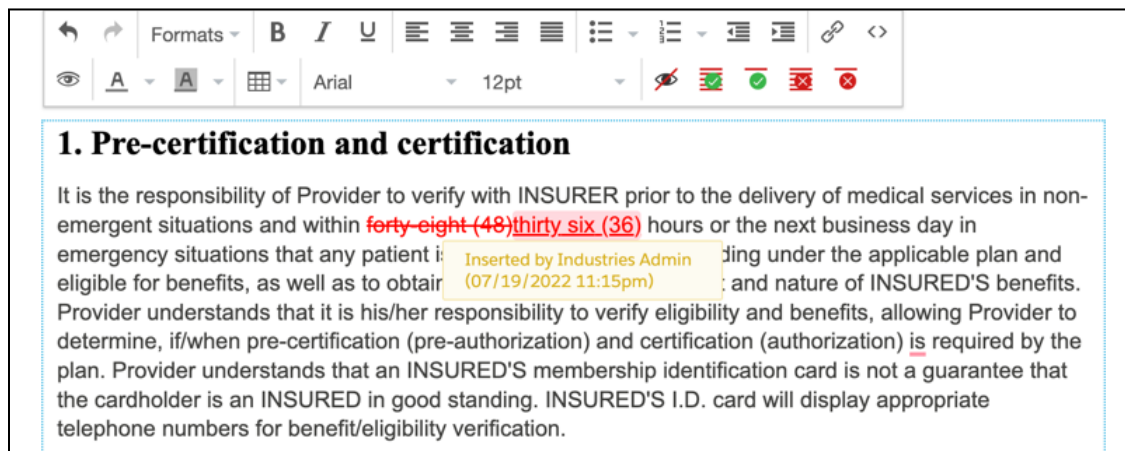
## Task 4: Customize a generated contract document

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.

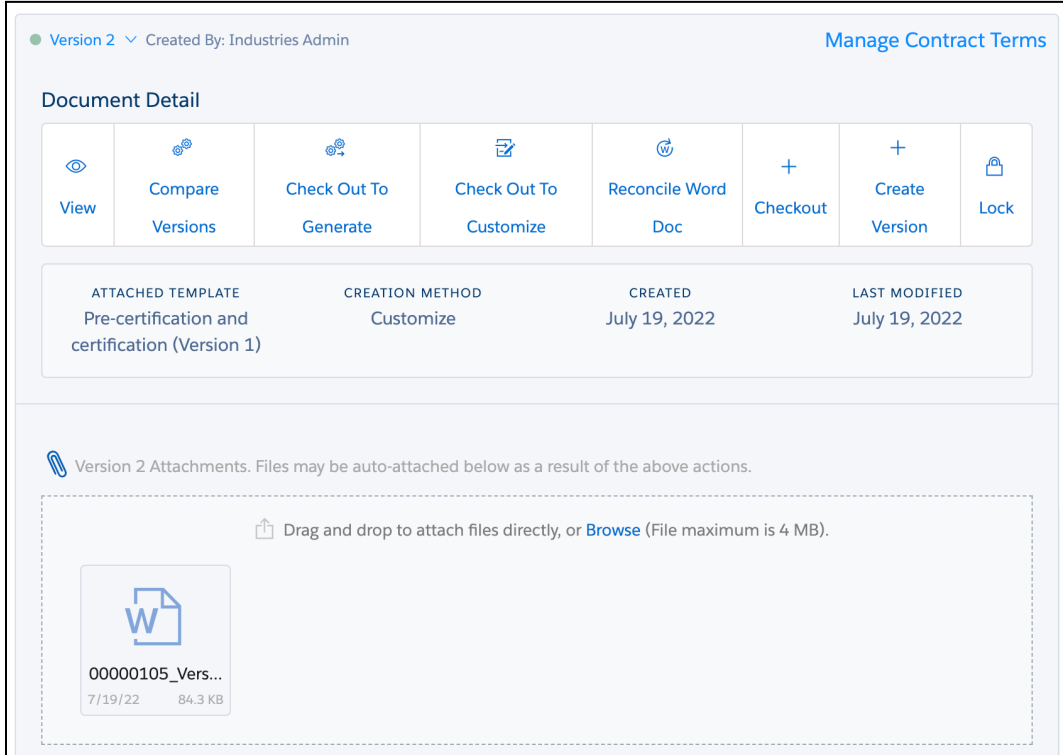


2. Click **Continue** at the prompt.
3. Replace the text forty eight (48) with thirty six (36). Notice that the text turns red, and you can hover over the text to view who deleted the text and when.



4. 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.
5. Click **Save All Sections**.

6. Click **Check In**.
7. Under the Documents tab, **Version 2** is now active.



The screenshot shows the Salesforce interface for a contract document. At the top, it indicates 'Version 2' is selected, created by 'Industries Admin', and includes a 'Manage Contract Terms' link. Below this is the '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 metadata: ATTACHED TEMPLATE (Pre-certification and certification (Version 1)), CREATION METHOD (Customize), CREATED (July 19, 2022), and LAST MODIFIED (July 19, 2022). The bottom section is titled 'Version 2 Attachments' and contains a dashed box for file uploads with instructions and a file icon. A file named '00000105\_Vers...' is shown with a date of '7/19/22' and a size of '84.3 KB'.

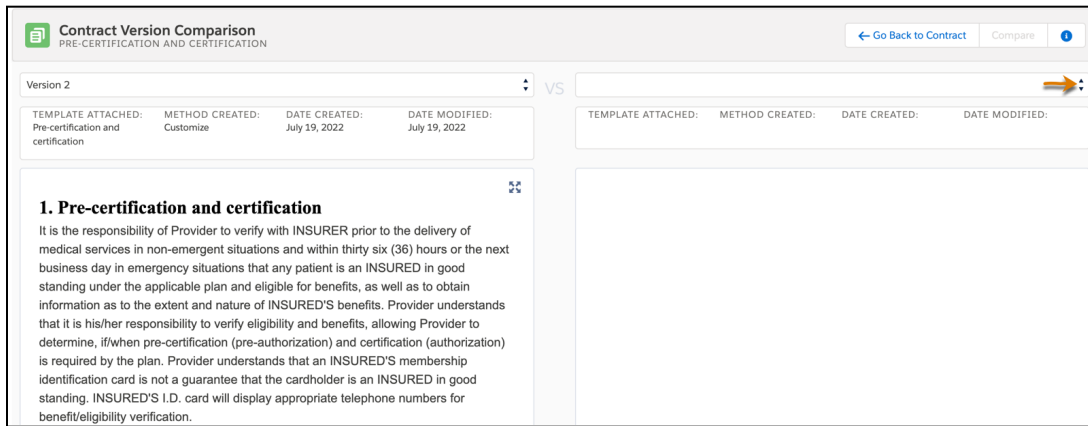
8. Click **View** to view the online version of Version 2.
  - a. You can see that the redlines are visible.

### 1. Pre-certification and certification

It is the responsibility of Provider to verify with INSURER prior to the delivery of medical services in non-emergent situations and within ~~forty-eight (48)~~thirty six (36) hours or the next business day in emergency situations that any patient is an INSURED in good standing under the applicable plan and eligible for benefits, as well as to obtain information as to the extent and nature of INSURED'S benefits. Provider understands that it is his/her responsibility to verify eligibility and benefits, allowing Provider to determine, if/when pre-certification (pre-authorization) and certification (authorization) is required by the plan. Provider understands that an INSURED'S membership identification card is not a guarantee that the cardholder is an INSURED in good standing. INSURED'S I.D. card will display appropriate telephone numbers for benefit/eligibility verification.

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

- 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.



The screenshot shows the 'Contract Version Comparison' interface. The left pane is titled 'Version 2' and contains a table with the following data:

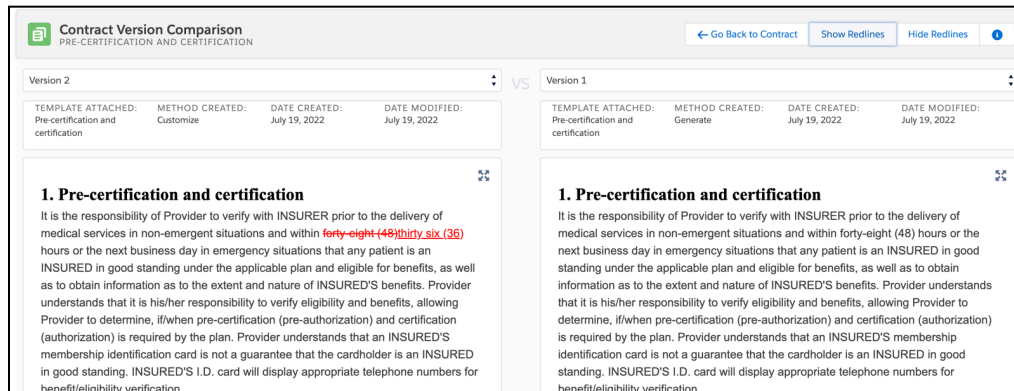
TEMPLATE ATTACHED:	METHOD CREATED:	DATE CREATED:	DATE MODIFIED:
Pre-certification and certification	Customize	July 19, 2022	July 19, 2022

Below the table is a section titled '1. Pre-certification and certification' with the following text:

It is the responsibility of Provider to verify with INSURER prior to the delivery of medical services in non-emergent situations and within thirty six (36) hours or the next business day in emergency situations that any patient is an INSURED in good standing under the applicable plan and eligible for benefits, as well as to obtain information as to the extent and nature of INSURED'S benefits. Provider understands that it is his/her responsibility to verify eligibility and benefits, allowing Provider to determine, if/when pre-certification (pre-authorization) and certification (authorization) is required by the plan. Provider understands that an INSURED'S membership identification card is not a guarantee that the cardholder is an INSURED in good standing. INSURED'S I.D. card will display appropriate telephone numbers for benefit/eligibility verification.

The right pane is currently empty.

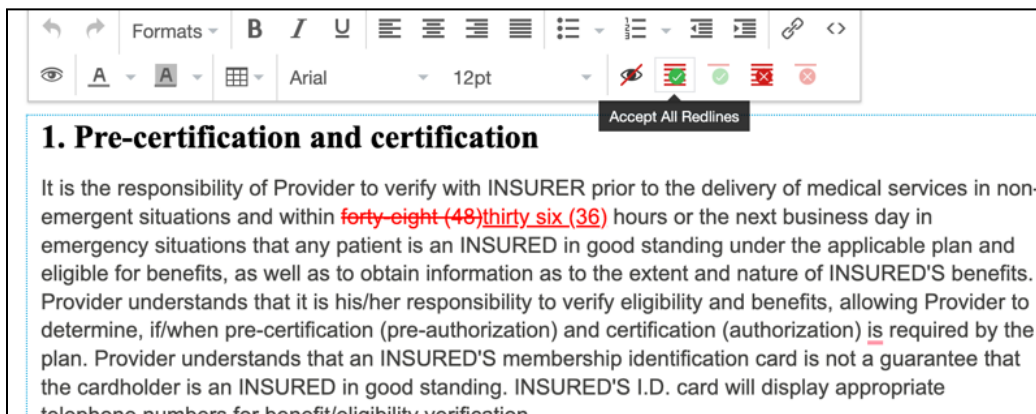
- Select **Version 1**. Both versions are now visible in the panes.
- Click **Compare**. Notice the **Show Redlines** button is set by default.
- View the redlines to show the differences between the versions.



The screenshot shows the 'Contract Version Comparison' interface with two panes. The left pane is 'Version 2' and the right pane is 'Version 1'. Both panes have the same table as in the previous screenshot. The text in both panes is identical, but redlines highlight differences between the two versions. In the left pane, the text 'forty-eight (48)thirty six (36)' is underlined in red. In the right pane, the text 'forty-eight (48) hours' is underlined in red. The interface also shows buttons for 'Go Back to Contract', 'Show Redlines', and 'Hide Redlines'.

- Click **Go Back to Contract**. The next steps are to accept the redlines in a new version of the document.
- Click **Check Out To Customize**. The Action Button Clicked notification is displayed.
  - Click **Continue**. Version 3 of the contract document is now displayed.

12. Select the updated text and click **Accept All Redlines**.



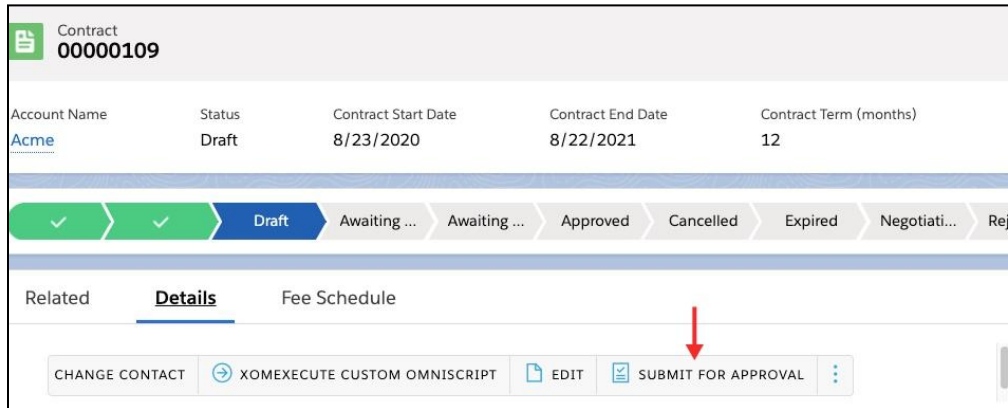
13. Click **Save All Sections**, then click **Check In**.

14. Under the Documents Detail Section, **Version 3** of the contract document is now active.

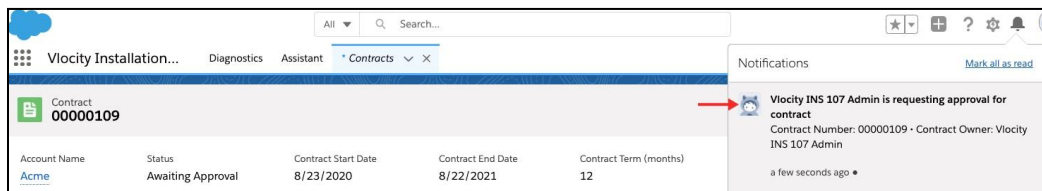
## Task 5: Submit a contract document for internal approval

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

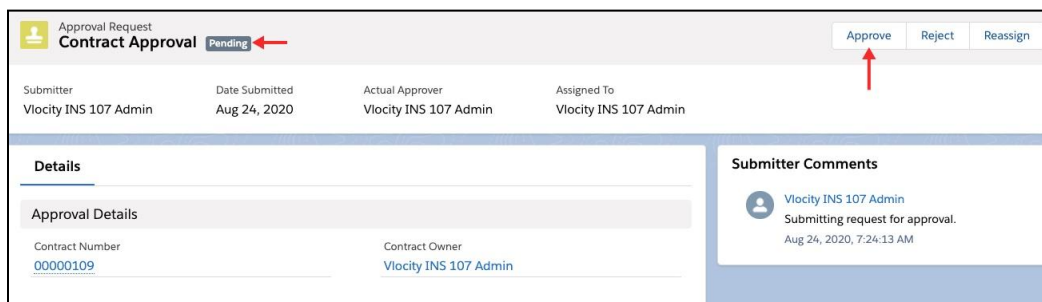
1. Under Contract Actions, click **SUBMIT FOR APPROVAL**. The contract status changes to Awaiting Approval. You'll also receive a notification email.



2. Click the notifications icon and click the contract approval notification.

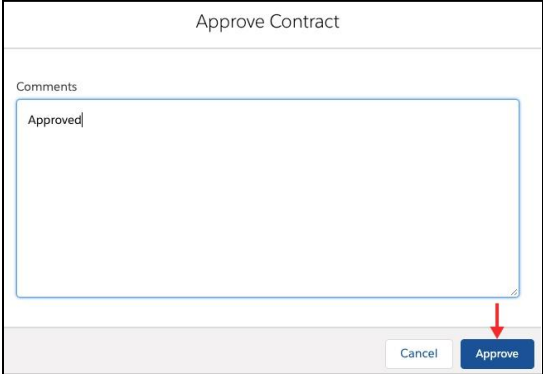


3. Once you click the link, it opens a new tab in your org. The Contract Approval status is **Pending**.





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



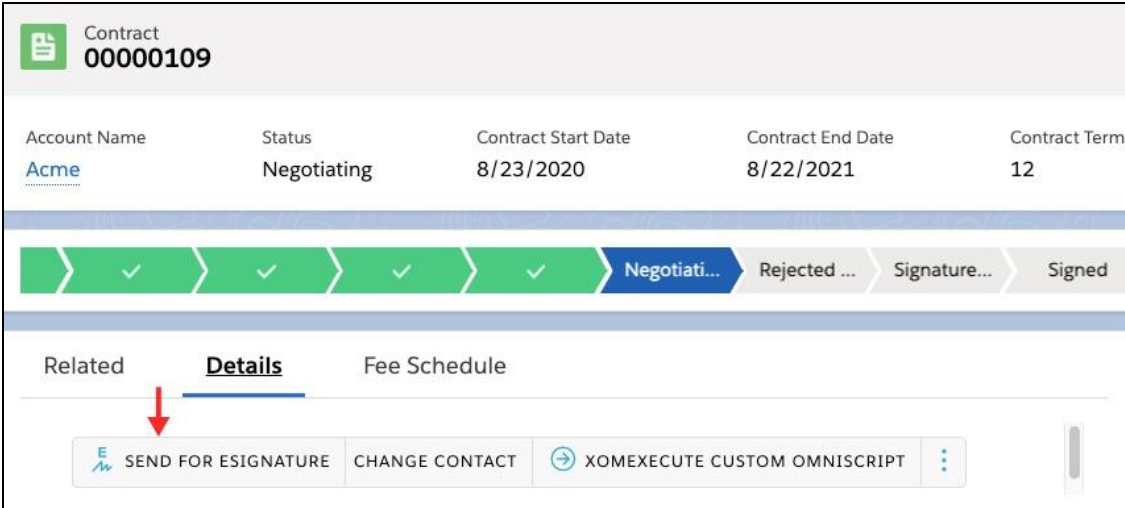
- 5. Click on the value below **Contract Number** field to navigate to the contract tab.
- 6. Notice the following changes. If needed, refresh the browser.
  - a. The contract status is now set to **Negotiating**.
  - b. The contract actions are now different. Your contract has now reached a status where you can send it to the customer for eSignature.
- 7. Select the **Related** tab to view the Approval History.

Approval History (2)			
Step Name	Date	Status	Assigned To
<a href="#">Manager Approval</a>	9/7/2020, 11:34 PM	Approved	Vlocity INS 108 Admin <input type="button" value="▼"/>
<a href="#">Approval Request Subm...</a>	9/7/2020, 11:33 PM	Submitted	Vlocity INS 108 Admin <input type="button" value="▼"/>
<a href="#">View All</a>			

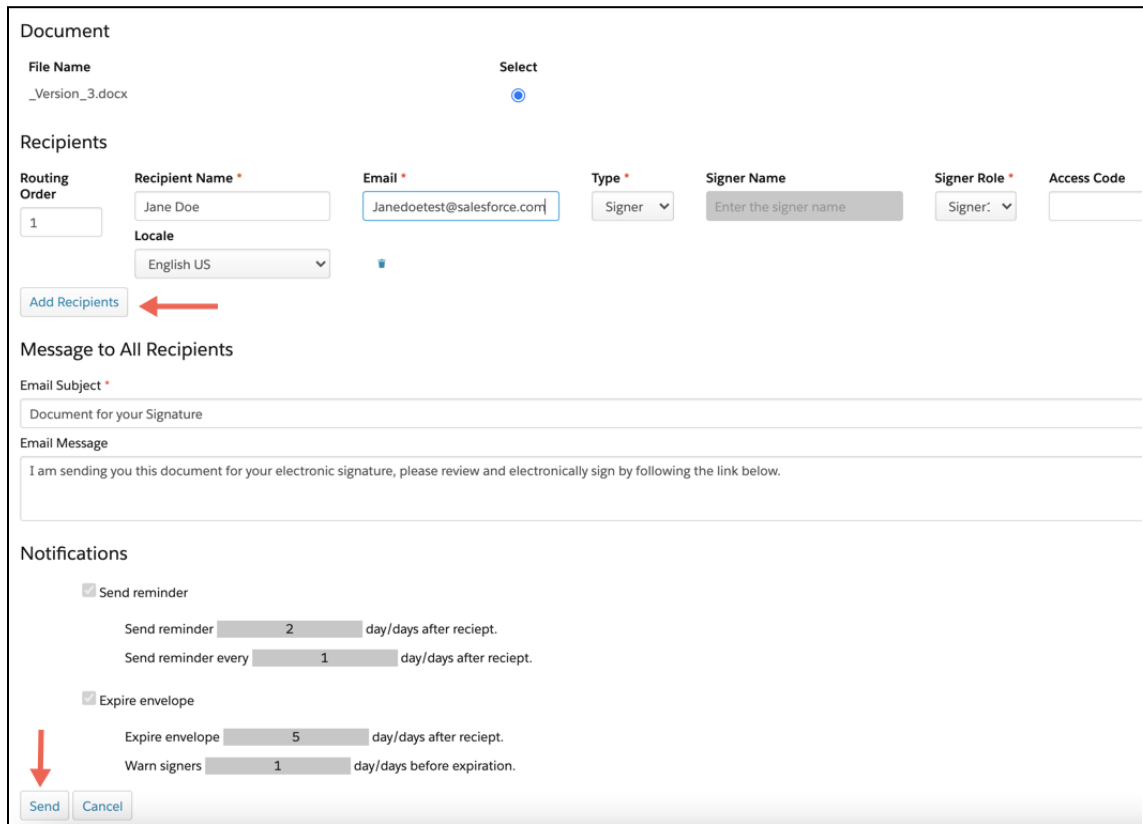
### Task 6: Send a contract document for signature

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

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



3. 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

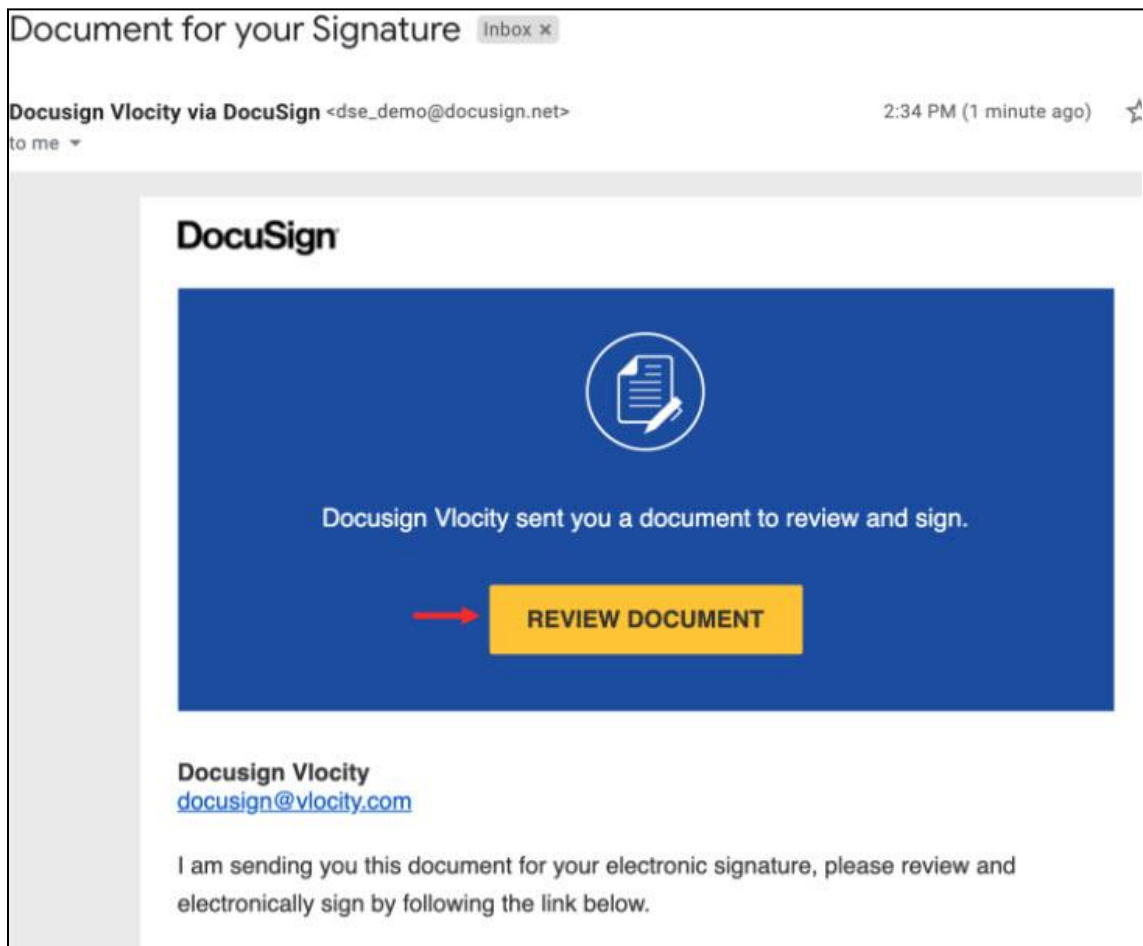
Expire envelope: 5 day/days after receipt.

Warn signers: 1 day/days before expiration.

Send Cancel

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

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

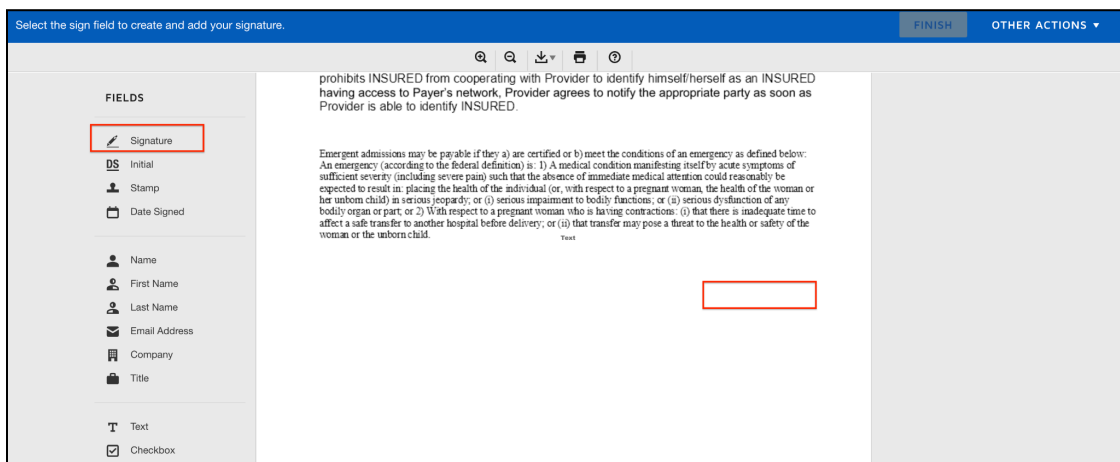


7. Click **REVIEW DOCUMENT**.

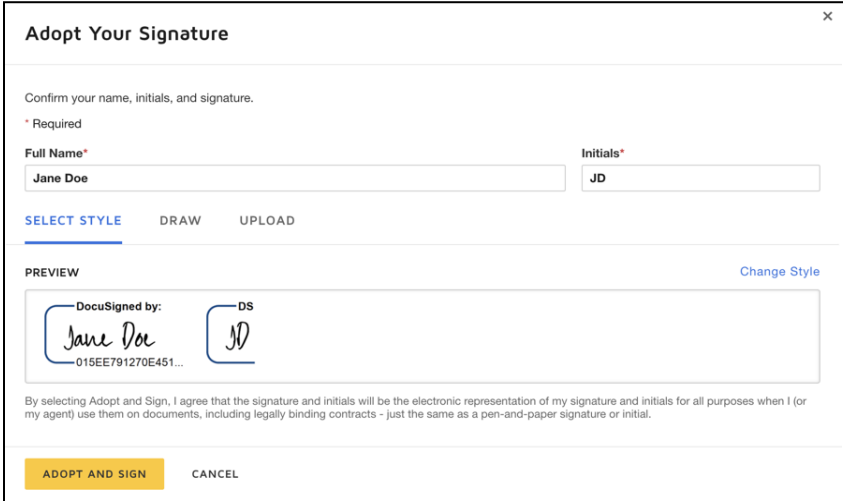
8. Select the **I agree to use electronic records and signatures** checkbox, then click **CONTINUE**.



9. Click **Signature** on left under the Fields section and then drag the yellow Sign chevron to end of the document.



10. 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\***  **Initials\***

[SELECT STYLE](#) [DRAW](#) [UPLOAD](#)

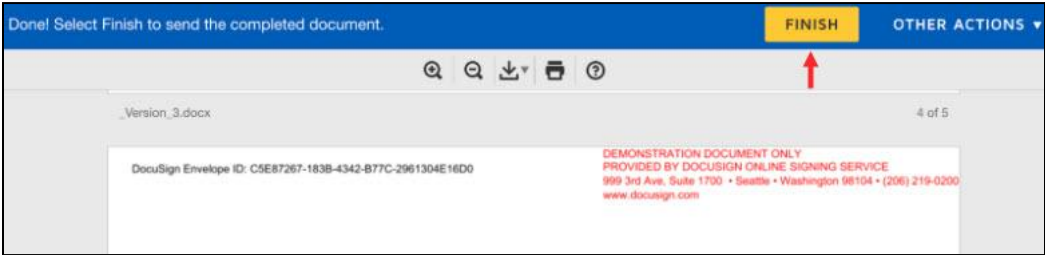
**PREVIEW** [Change Style](#)

DocuSigned by:  DS   
015EE791270E451...

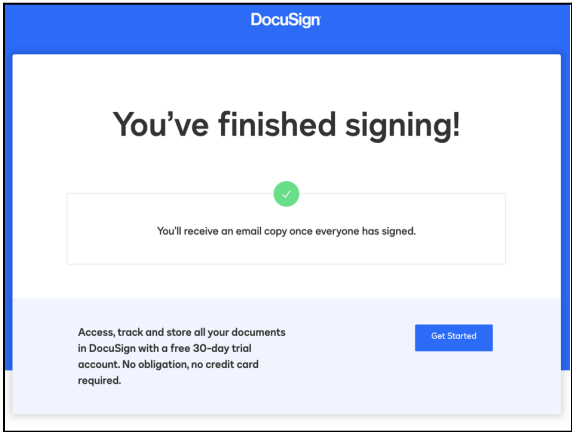
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

[ADOPT AND SIGN](#) [CANCEL](#)

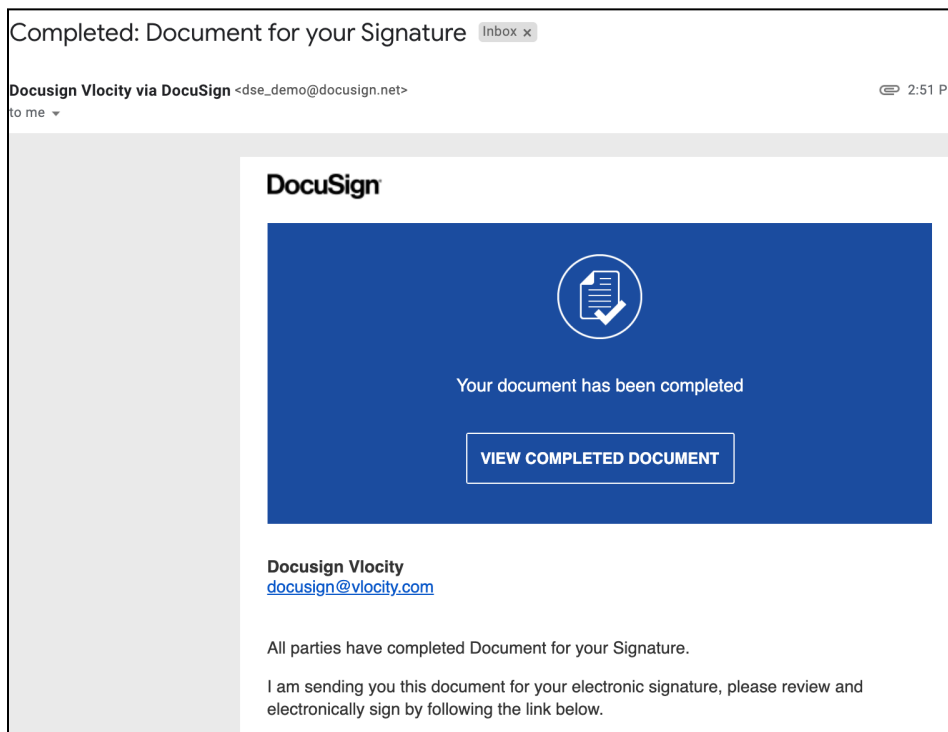
11. Click **FINISH**.



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

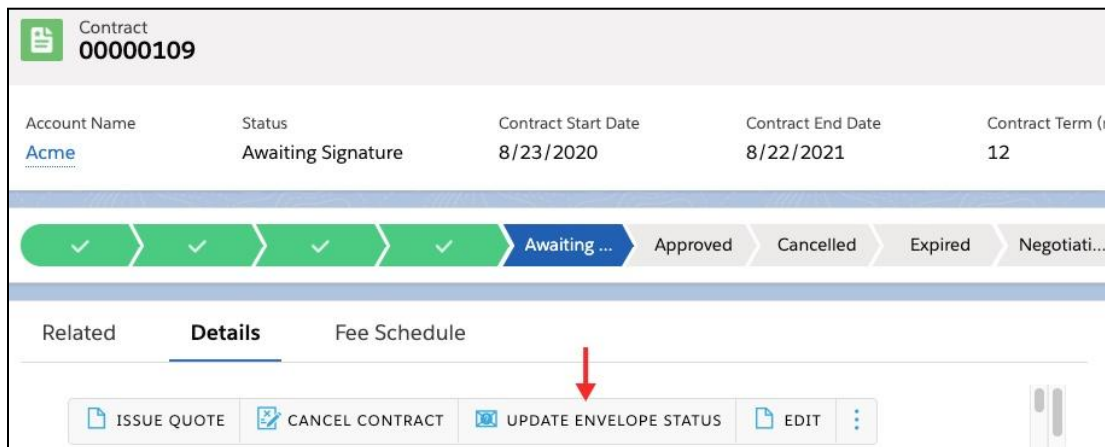


13. You'll receive a confirmation email, which you can also review.

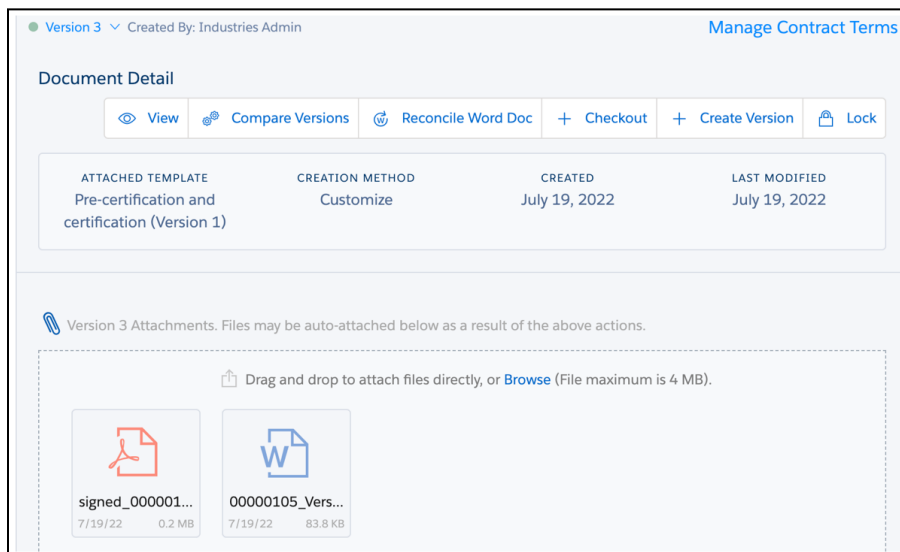


14. Go back to the contract record.

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



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



The screenshot shows the 'Version 3' details for a contract. At the top, it says 'Version 3' and 'Created By: Industries Admin'. Below this is a 'Document Detail' section with a toolbar containing 'View', 'Compare Versions', 'Reconcile Word Doc', 'Checkout', 'Create Version', and 'Lock'. A table below the toolbar lists document metadata:

ATTACHED TEMPLATE	CREATION METHOD	CREATED	LAST MODIFIED
Pre-certification and certification (Version 1)	Customize	July 19, 2022	July 19, 2022

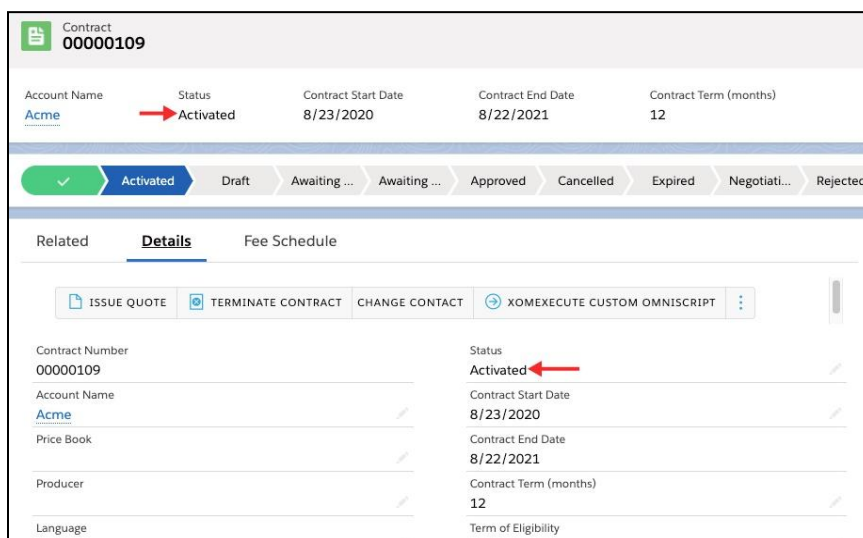
Below the table, there is a section for 'Version 3 Attachments'. It includes a message: 'Version 3 Attachments. Files may be auto-attached below as a result of the above actions.' and a dashed box for file uploads with the instruction: 'Drag and drop to attach files directly, or Browse (File maximum is 4 MB)'. Two files are shown as attached:

- signed\_000001... (7/19/22, 0.2 MB)
- 00000105\_Vers... (7/19/22, 83.8 KB)

Finally, let's activate the signed contract.

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

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



The screenshot shows the details for Contract 00000109. At the top, the contract number is 00000109. Below this is a summary table:

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
Acme	Activated	8/23/2020	8/22/2021	12

Below the summary table is a status flow: Draft (selected), Awaiting..., Awaiting..., Approved, Cancelled, Expired, Negotiated, Rejected. The 'Details' tab is active, showing a toolbar with 'ISSUE QUOTE', 'TERMINATE CONTRACT', 'CHANGE CONTACT', and 'XOMEXECUTE CUSTOM OMNISCRIP'. Below the toolbar is a table of contract details:

Contract Number	Status
00000109	Activated
Account Name	Contract Start Date
Acme	8/23/2020
Price Book	Contract End Date
	8/22/2021
Producer	Contract Term (months)
	12
Language	Term of Eligibility