



This document outlines important information
for configuration /mapping process for
“Intelligent Third Party Paper Extraction”

Brightleaf TPP Package for Salesforce - Configuration/Map ping Guide

Brightleaf Solutions, Inc.
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Brightleaf TPP Package Configuration/Mapping Guide

For Apttus/SF (A1)

Version 1.0

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[Third Party Paper \(TPP\) Configuration/Mapping Guide](#)

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Overview

Third Party Paper Help Text (TPP Help Text) will help the CLM Platform's client/customer to configure key fields within the CLM Platform's application enabling them to extract key field information from their agreements without outsourcing the extraction business to an external Vendor. The purpose of this document is to explain different configurations and navigation within CLM Platform application related to the metadata field/clause extraction.

Definitions

In this document (TPP Help Text), the following terms are used often. Here are their definitions:

- a) **"Agreement"** means any TPP document uploaded in CLM Platform's application.
- b) **"Agreement Type"** means any type of Agreement defined in the CLM Platform's application. Record Type defined is used as Agreement Type field in "BL Metadata Config" tab.
- c) **"Agreement Field"** means any CLM Platform API field which should be mapped with the Attribute created within the CLM Platform's application.
- d) **"Attribute"** means the meta data field name for which information is to be extracted from the Agreement.
- e) **"Attribute Name"** means an attribute defined as a field or clause within the CLM Platform application.
- f) **"BL Metadata Config"** means a tab in the CLM Platform's application which explains the metadata field or clause configuration.
- g) **"Clause"** means any metadata field defined as "Clause" within the CLM Platform application. A clause is configured as long text.
- h) **"Configuration"** means the way the metadata fields are set-up and arranged within the CLM Platform's application.
- i) **"Field"** means any metadata field defined within the CLM Platform application. A field contains short text.
- j) **"Gear Icon"** means the top-right icon in CLM Platform application, clicking on it navigates user to the setup of different fields, agreement types, record types etc.
- k) **"Record Type"** means any agreement type like MSA, NDA, Statement of Work, etc. Record Type defined is used as Agreement Type field in BL Metadata Config tab.
- l) **"Reference Clause"** means a clause reference is given to any Attribute Name defined as Field. Reference Clause is one column in the BL Metadata Config tab using which a clause reference can be given to any metadata field.
- m) **"Type"** means the classification of metadata field. Any metadata field information can be of short text like; date, entity name, or long text. The Type field helps to classify a metadata field. In the CLM application, a field can be defined as Field or Clause during creation and configuration of any field in BL Metadata Config tab.

Note: For the documentation purpose, screenshots provided in this document throughout are shown for the Sandbox Org. This will vary for the Production Org.

Configuration of Fields

To extract data or information from any agreement, certain fields or clauses are to be defined in the CLM application. This section will help in the configuration of the fields.

The configuration is explained in different sections:

A. Configuration of Record Type

B. Creation of Attribute Name

A. Configuration of Record Type

Record Type refers to the type of agreement. Based on the agreement type, record type will be configured and the agreement will be classified into that particular record type. In the CLM Platform application, configuration of Record Type is a two-step process:

- a) Creation of Record Type
- b) Add newly created record type in list box

Example:

Based on the below screenshot, the agreement title is "MASTER SERVICE AGREEMENT". The record type will be defined as "MSA".



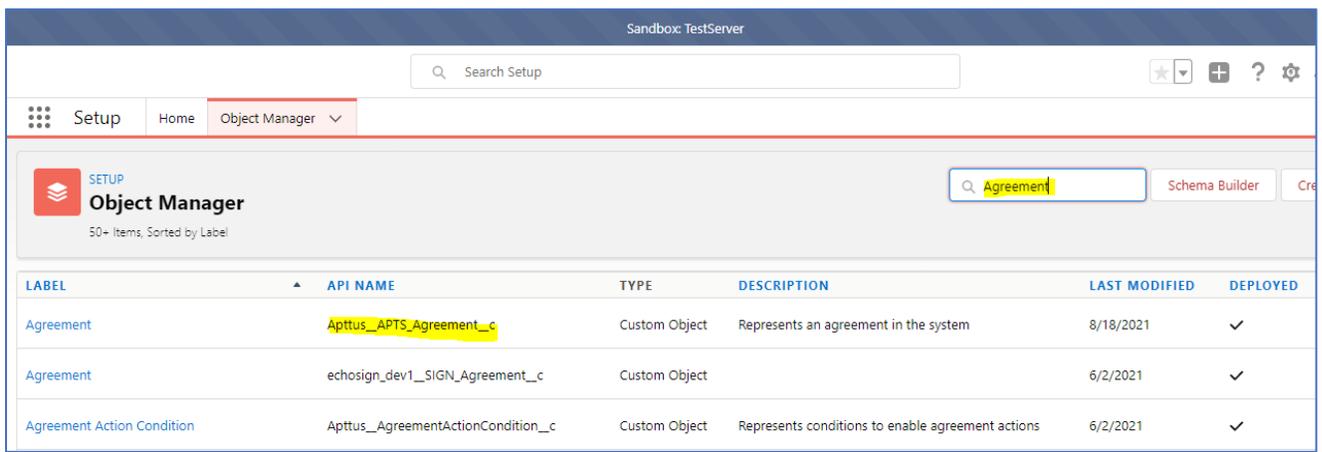
To create and configure record type, go to the top right of the page.

a) Creation of Record Type

1. Click on the Gear Icon as shown in the screenshot below. A small menu will appear. From that menu, click on Setup. Refer to screenshot below.

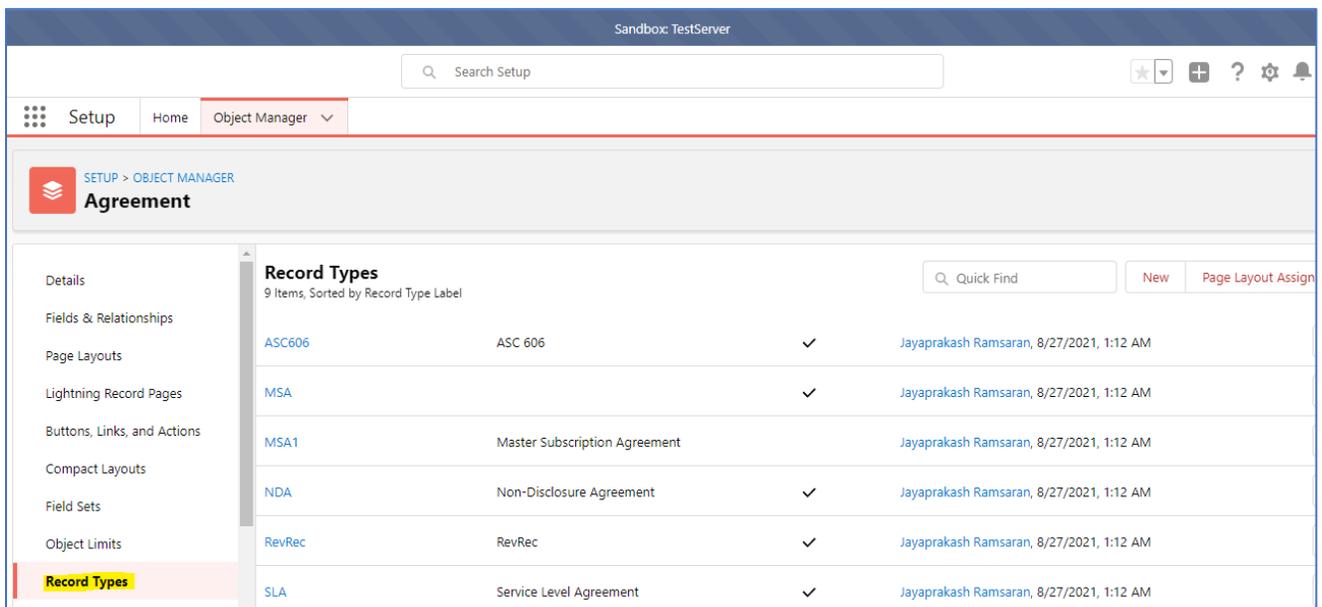


2. There will be two tabs: "Home" and "Object Manager". Click on the Object Manager tab. Type 'Contract Agreement' in search box. Refer to the screenshot below.



3. Click on Agreement whose API_Name begins with 'Apttus__APTS_Agreement__c'.

4. Click on Record Type in the left pane of the Object Manager tab. Refer to the screenshot below.

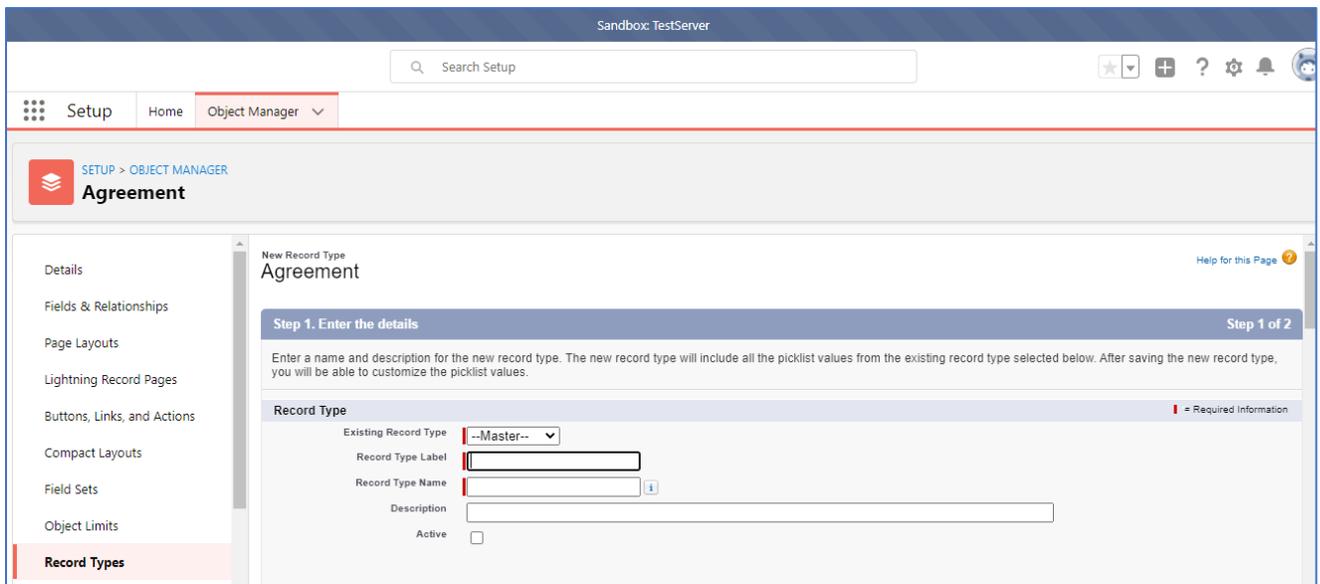


5. A list of existing Record Types will be displayed on the right side. To create a new record type, click on the 'New' button on the right-side. A new page will appear as shown below. Fill in the new record name details per requirement.

Select the existing record type from which the new record type is created.

Enter Record Type Label, Enter Record Type Name, Give Description etc.

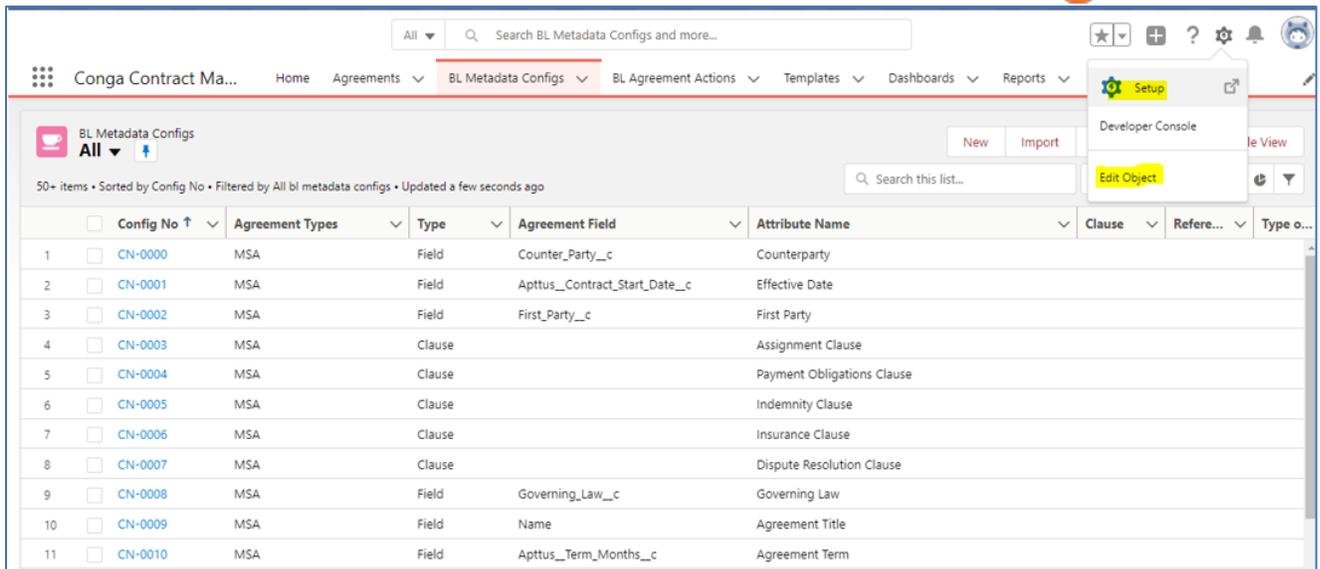
Refer to the screenshot below.



b) Add Record Type to List Box

Once the record type is created, it is required to add to an existing list of record types. For this, follow the steps listed below:

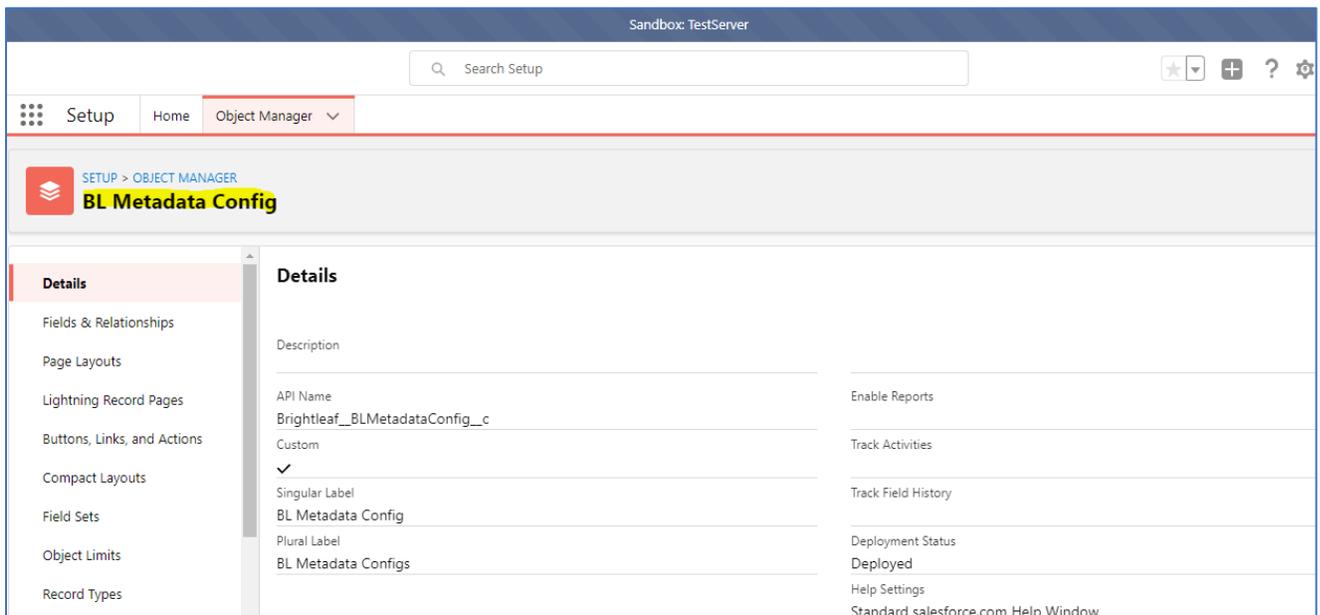
1. Navigate to the BL Metadata Config tab. It will display the list of existing fields. Stay on this page and click on the Gear Icon on the top right side. A small menu will appear and from that menu, click on Edit Object. Refer to the screenshot below.



50+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated a few seconds ago

Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Referenc...	Type o...
1	MSA	Field	Counter_Party__c	Counterparty			
2	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date			
3	MSA	Field	First_Party__c	First Party			
4	MSA	Clause		Assignment Clause			
5	MSA	Clause		Payment Obligations Clause			
6	MSA	Clause		Indemnity Clause			
7	MSA	Clause		Insurance Clause			
8	MSA	Clause		Dispute Resolution Clause			
9	MSA	Field	Governing_Law__c	Governing Law			
10	MSA	Field	Name	Agreement Title			
11	MSA	Field	Apttus_Term_Months__c	Agreement Term			

2. On top, the Object Manager tab, should display BL Metadata Config as its sub-heading. Refer to the screenshot below.



Sandbox: TestServer

Setup > Object Manager

BL Metadata Config

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

Details

Description

API Name: Brightleaf__BLMetadataConfig__c

Enable Reports

Custom: Track Activities

Singular Label: BL Metadata Config

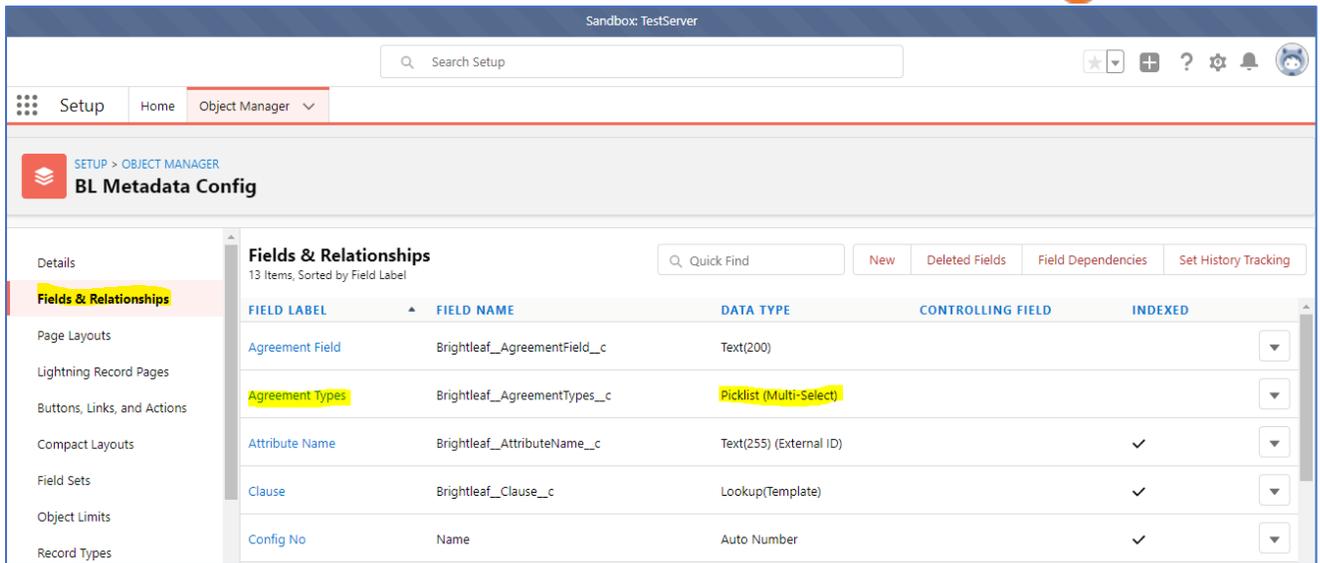
Track Field History

Plural Label: BL Metadata Configs

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

3. From the list of options shown in left panel, navigate to 'Fields & Relationships'. The list of available Field Names and labels are displayed. It has the data type Picklist (Multiple Values). Refer to the screenshot below.



Sandbox: TestServer

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
BL Metadata Config

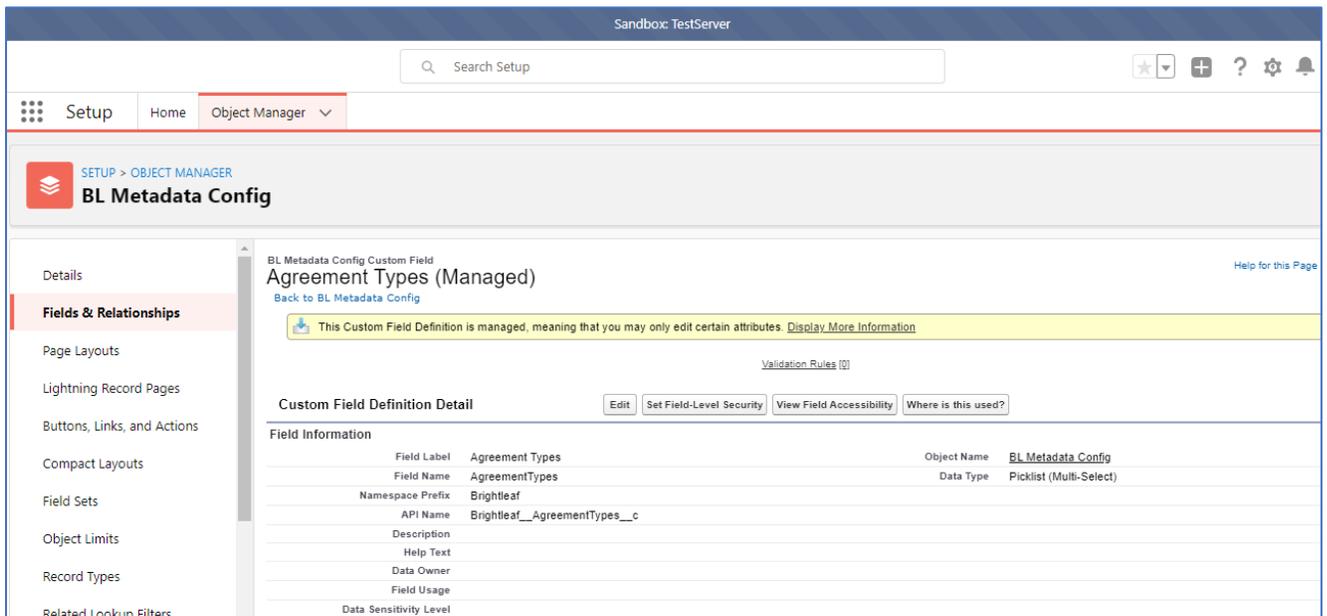
Details

Fields & Relationships
13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Agreement Field	Brightleaf__AgreementField__c	Text(200)		
Agreement Types	Brightleaf__AgreementTypes__c	Picklist (Multi-Select)		
Attribute Name	Brightleaf__AttributeName__c	Text(255) (External ID)		✓
Clause	Brightleaf__Clause__c	Lookup(Template)		✓
Config No	Name	Auto Number		✓

4. From listed Field Labels, click on 'Agreement Types' with data type Picklist (Multiple Values). 'Agreement Type' field detail page will be displayed. Refer to the screenshot below.



Sandbox: TestServer

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
BL Metadata Config

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

BL Metadata Config Custom Field
Agreement Types (Managed)
[Back to BL Metadata Config](#) [Help for this Page](#)

This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information	
Field Label	Agreement Types
Field Name	AgreementTypes
Object Name	BL_Metadata_Config
Namespace Prefix	Brightleaf
Data Type	Picklist (Multi-Select)
API Name	Brightleaf__AgreementTypes__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	

5. On the Custom Field Definition Detail page, under the **Values** section, click on 'New' to add the newly created record type as one of the pick lists values. Refer to the screenshot below.

Validation Rules New Validation Rules Help ?

No validation rules defined.

Values New Reorder Replace Printable View Values Help ?

Action	Values	API Name	Default	Modified By
Edit Del Deactivate	NDA	NDA	<input type="checkbox"/>	Jayaprakash Ramsaran , 8/27/2021, 1:12 AM
Edit Del Deactivate	AllTypes	AllTypes	<input type="checkbox"/>	Jayaprakash Ramsaran , 10/20/2021, 6:22 AM
Edit Del Deactivate	MSA	MSA	<input type="checkbox"/>	Jayaprakash Ramsaran , 10/20/2021, 6:22 AM
Edit Del Deactivate	CA	CA	<input type="checkbox"/>	Jayaprakash Ramsaran , 10/20/2021, 6:22 AM

6. Once the 'New' option is clicked, enter record type 'MSA' and click on Save. Refer to the screenshot below.

Add Picklist Values Help for this Page ?

Agreement Types

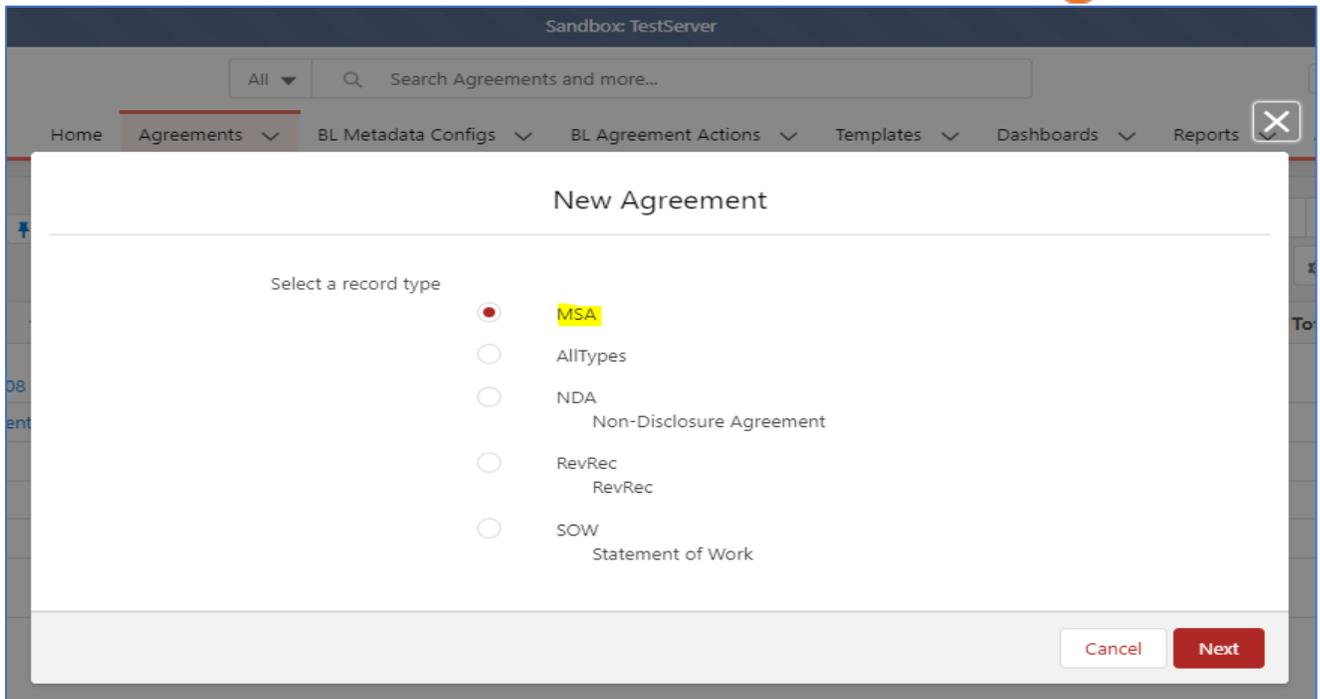
Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Save Cancel

7. The created record type will be displayed as one of the radio options buttons when a new agreement is created. Refer to the screenshot below.



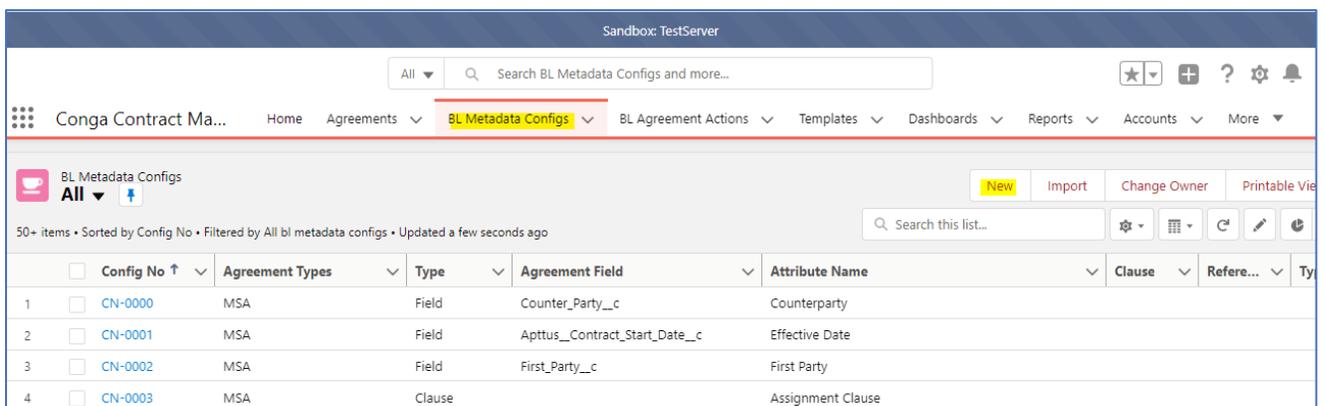
B. Creation of Attribute Name

The Attribute Name is the attribute which refers to the meta data field/clause created on CLM Platform application.

Please refer to the Brightleaf Standard Attributes link for the attributes list.

Brightleaf Standard attributes link: <https://www.brightleaf.com/standard-attribute>

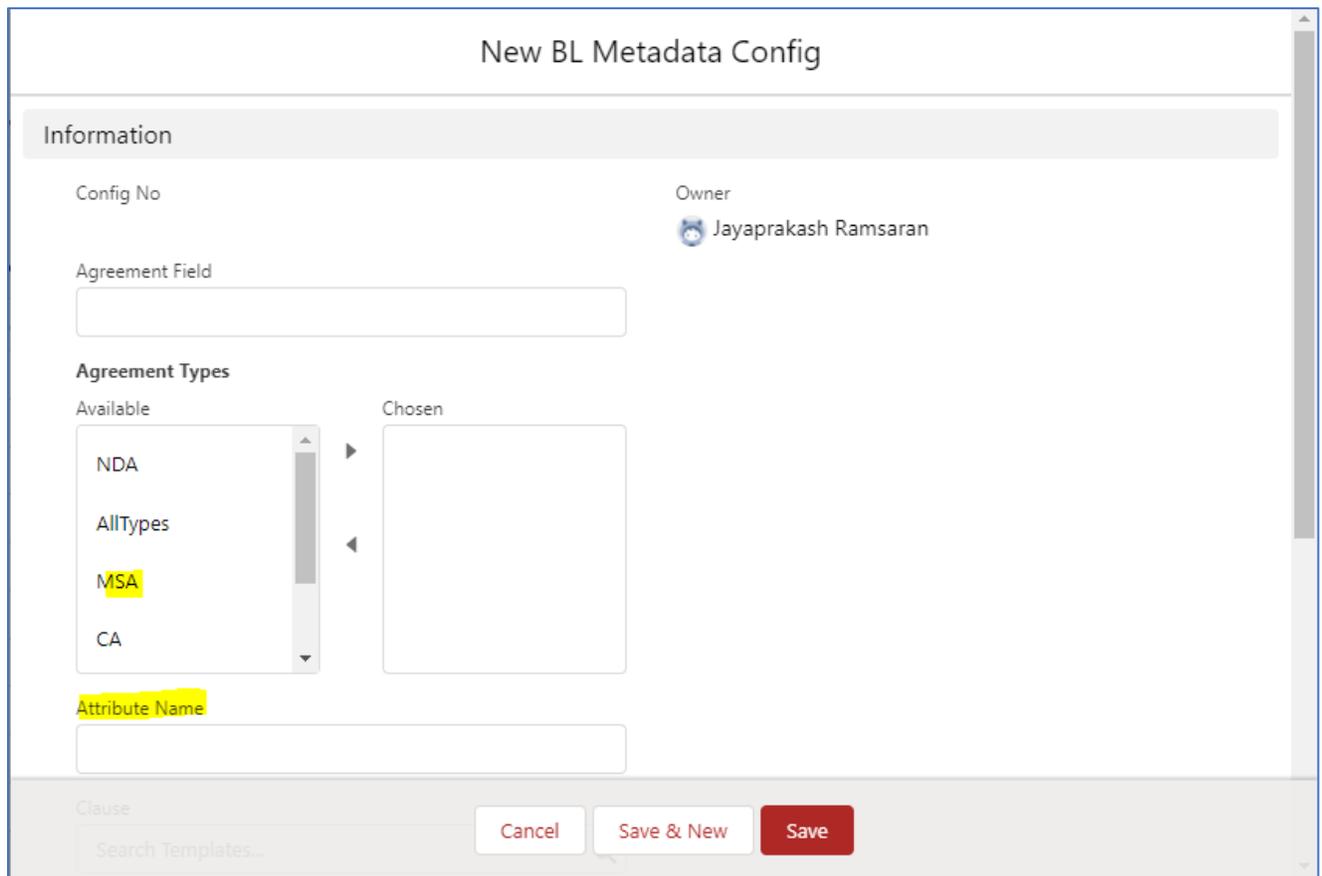
1. To create an Attribute as a field, navigate to the BL Metadata Config tab. It will display the list of existing fields. Refer to the screenshot below.



Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Reference
1	MSA	Field	Counter_Party__c	Counterparty		
2	MSA	Field	Apptus_Contract_Start_Date__c	Effective Date		
3	MSA	Field	First_Party__c	First Party		
4	MSA	Clause		Assignment Clause		

2. From the top-right, click on 'New' to create an attribute. Refer to the screenshot below.

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A screenshot of a web application interface titled "New BL Metadata Config". The form is divided into sections: "Information" at the top, followed by "Agreement Field" with an empty text box. Below that is the "Agreement Types" section, which includes two columns: "Available" and "Chosen". The "Available" column contains a list of options: "NDA", "AllTypes", "MSA" (highlighted in yellow), and "CA". The "Chosen" column is currently empty. Below the "Available" list is an "Attribute Name" field (also highlighted in yellow) with an empty text box. At the bottom of the form, there is a "Clause" section with a "Search Templates..." input field and three buttons: "Cancel", "Save & New", and "Save". The "Owner" field is set to "Jayaprakash Ramsaran".

3. For example, to create an attribute 'Effective Date', the following steps need to be done (or completed):
 - a. Provide Attribute Name as 'Effective Date'
 - b. Provide type as 'Field'
 - c. Select the Agreement Type with which the Attribute Name to map. For example, 'MSA'. There is an option to map one Attribute Name with multiple Agreement Types.
 - d. Once the above information filled, click on Save.Refer to the screenshot below.

Edit CN-0001

Config No: CN-0001 Owner: Intelligent Third Party Paper Extraction

Agreement Field:

Agreement Types

Available: NDA, AllTypes, CA, GS MSA

Chosen: MSA

Attribute Name:

Clause:

4. To create an Attribute as clause, navigate to BL Metadata Config tab. It will display the list of existing fields. Refer to the screenshot below.

Sandbox: TestServer

All Search BL Metadata Configs and more...

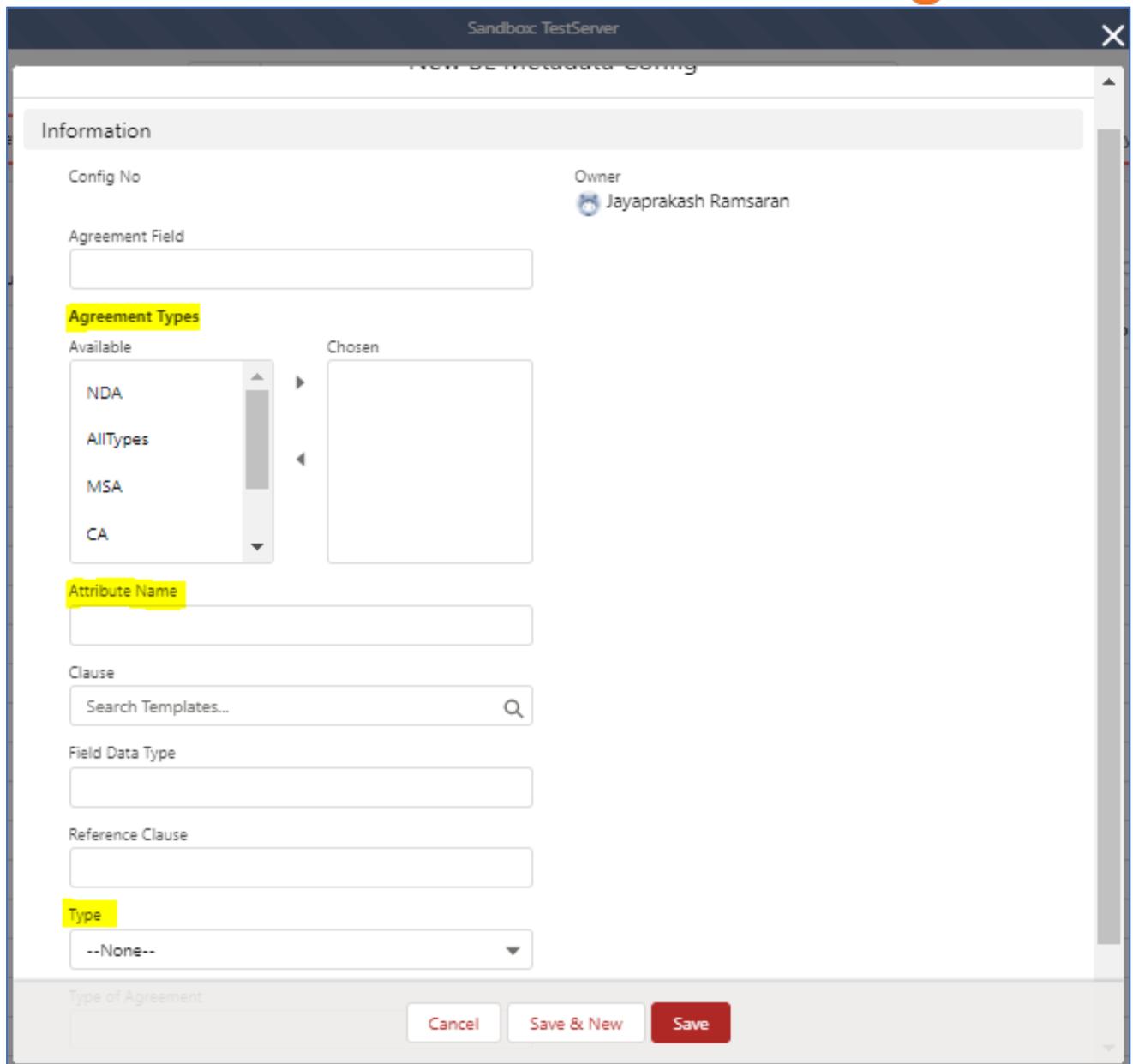
Conga Contract Ma... Home Agreements **BL Metadata Configs** BL Agreement Actions Templates Dashboards Reports Accounts Me

BL Metadata Configs All New Import Change Owner

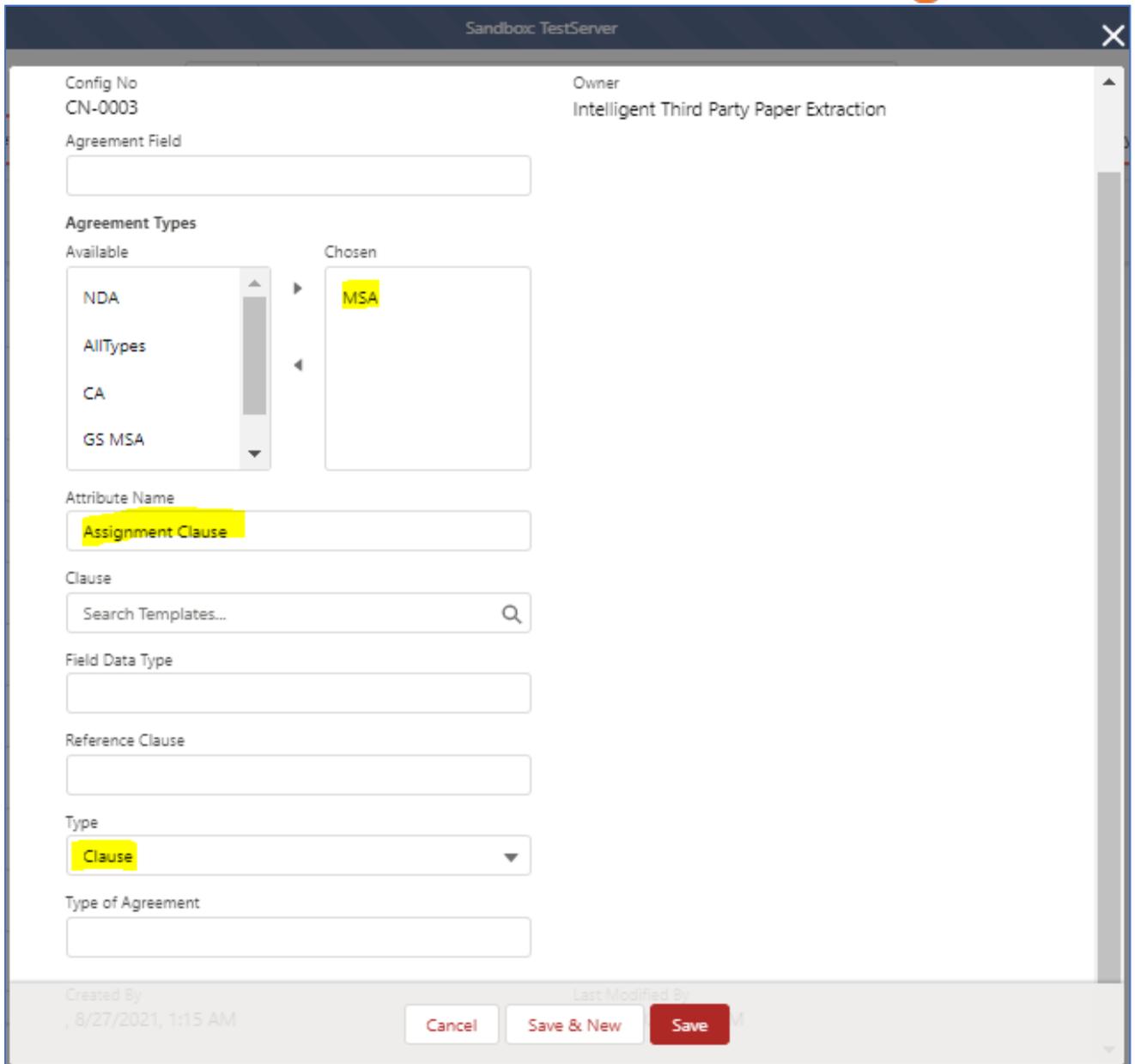
0+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated a few seconds ago

	Config No ↑	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refer
1	<input type="checkbox"/> CN-0000	MSA	Field	Counter_Party_c	Counterparty		
2	<input type="checkbox"/> CN-0001	MSA	Field	Apttus_Contract_Start_Date_c	Effective Date		
3	<input type="checkbox"/> CN-0002	MSA	Field	First_Party_c	First Party		

5. From the top-right, click on 'New' to create an attribute. Refer to the screenshot below.



6. For example, to create an attribute 'Assignment Clause', following steps to be performed:
 - a. Provide Attribute Name as 'Assignment Clause'
 - b. Provide type as 'Clause'
 - c. Select the Agreement type with which the Attribute Name to map. Select? 'MSA'. There is an option to map one Attribute Name with multiple Agreement Types.
 - d. Once above information filled, click on Save.Refer to the screenshot below.



The screenshot shows a web application window titled "Sandbox TestServer". The main content area is a configuration form for an "Agreement Field".

- Config No:** CN-0003
- Owner:** Intelligent Third Party Paper Extraction
- Agreement Field:** An empty text input field.
- Agreement Types:** A section with two columns: "Available" and "Chosen".
 - Available:** A list box containing "NDA", "AllTypes", "CA", and "GS MSA".
 - Chosen:** A list box containing "MSA".
- Attribute Name:** A text input field containing "Assignment Clause".
- Clause:** A search input field with the placeholder text "Search Templates..." and a magnifying glass icon.
- Field Data Type:** An empty text input field.
- Reference Clause:** An empty text input field.
- Type:** A dropdown menu with "Clause" selected.
- Type of Agreement:** An empty text input field.

At the bottom of the form, there is a footer area with the following information:

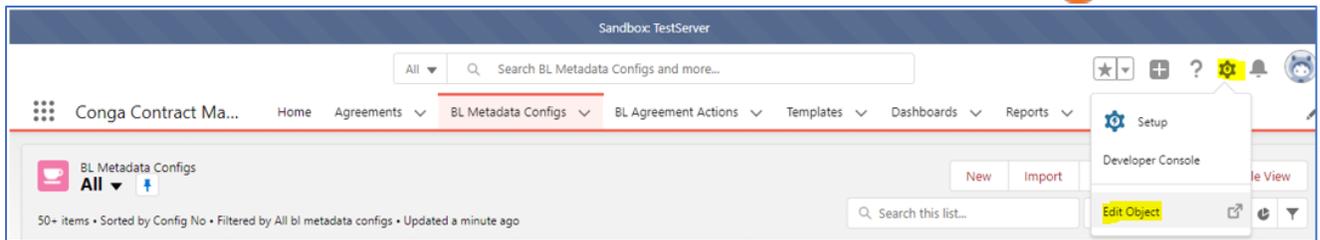
- Created By:** [Name obscured]
- Last Modified By:** [Name obscured]
- Created On:** 8/27/2021, 1:15 AM
- Buttons:** "Cancel", "Save & New", and "Save".

7. Now, for the above Assignment Clause, provide the Standard Clause Text using Templates Tab. Please refer to section Creation of Clause Library for this.

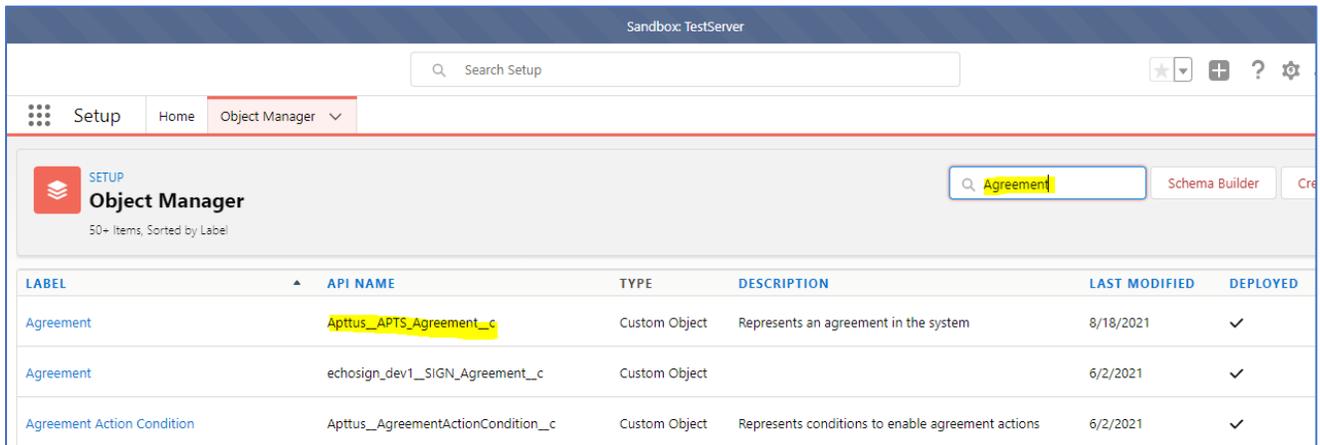
C. Creation of Agreement Fields

Once the attributes are created, Attribute Name has to be mapped with some Agreement Field. A Following steps required for an Agreement Field creation

1. Click on Gear Icon as shown in below screenshot. A small menu will appear. From that menu, click on Setup. Refer to the screenshot below.

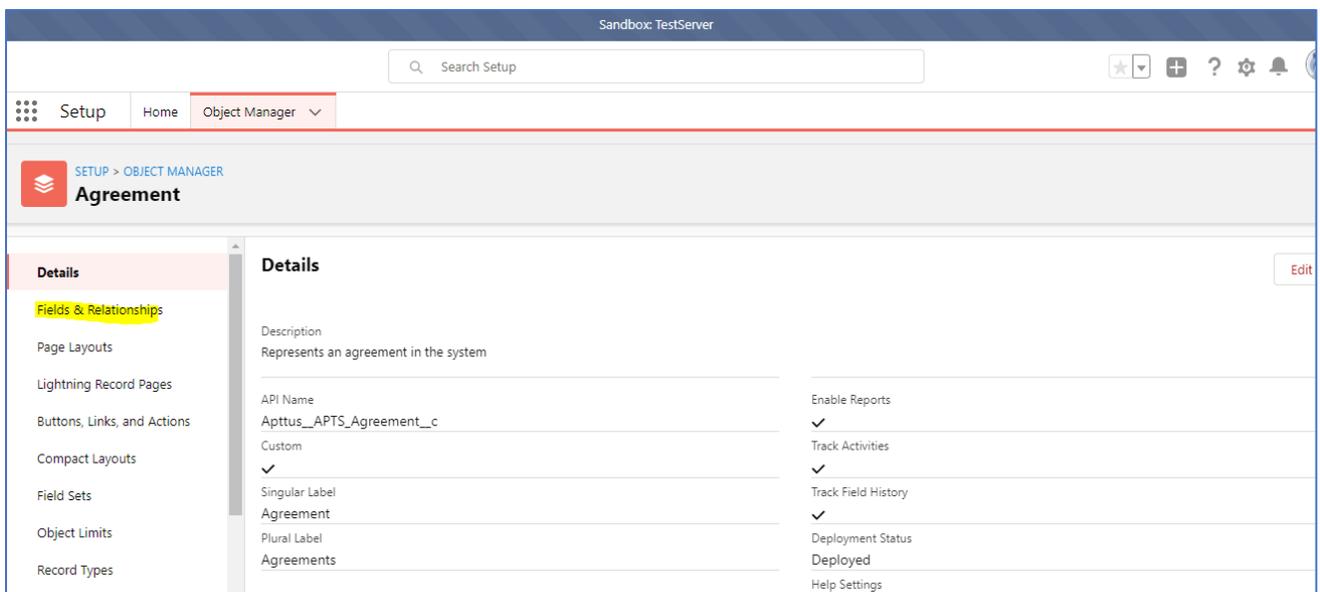


2. There will be two tabs: 'Home' and 'Object Manager'. Click on the Object Manager tab. Type 'Contract Agreement' in search box. Refer to the screenshot below.

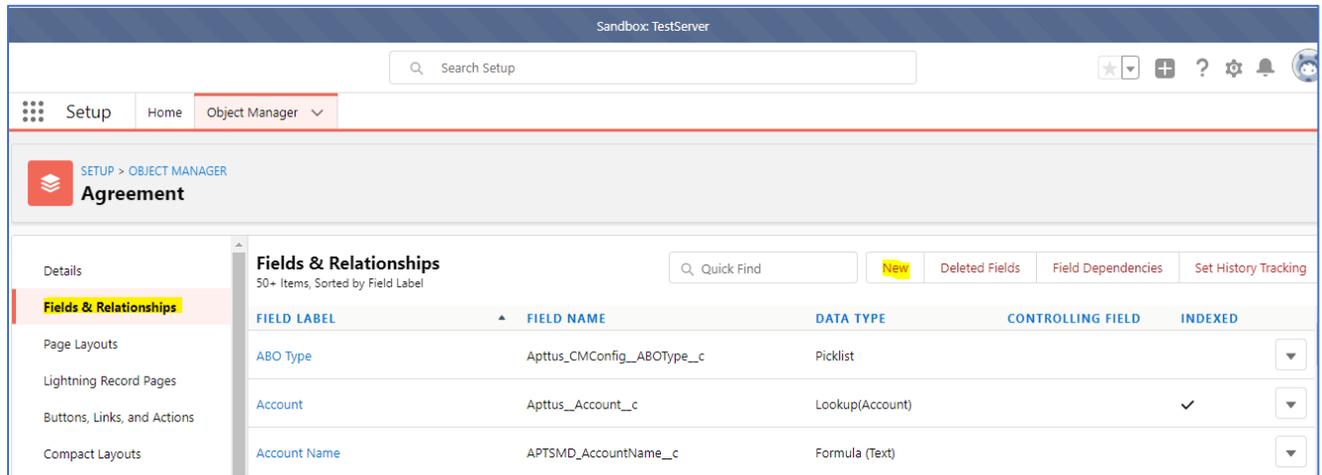


Click on Agreement label whose API_Name begins with 'Apttus__APTS_Agreement__c'.

3. From the list of options shown in left panel, navigate to 'Fields & Relationships'. Refer to the screenshot below.



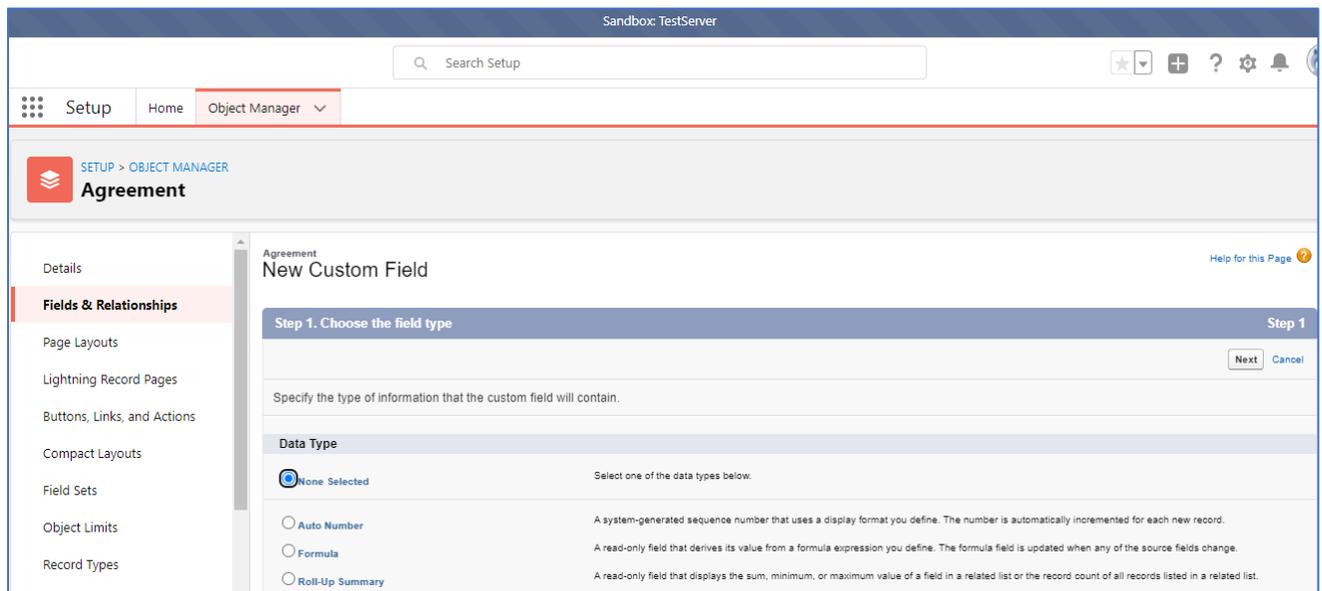
4. On the right side, the list of all available API fields will be displayed. Click on 'New' from the top-right to create a new Agreement Field. These fields are also known as Custom Fields. Refer to the screenshot below.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
ABO Type	Apttus_CMConfig_ABOType__c	Picklist		
Account	Apttus_Account__c	Lookup(Account)		✓
Account Name	APTSMD_AccountName__c	Formula (Text)		

5. Creation of a new custom field is a 4-step process and are as follows:

a. First step: Select Data type. For example, Text type selected. Refer to the screenshot below.



Step 1. Choose the field type Step 1

Specify the type of information that the custom field will contain.

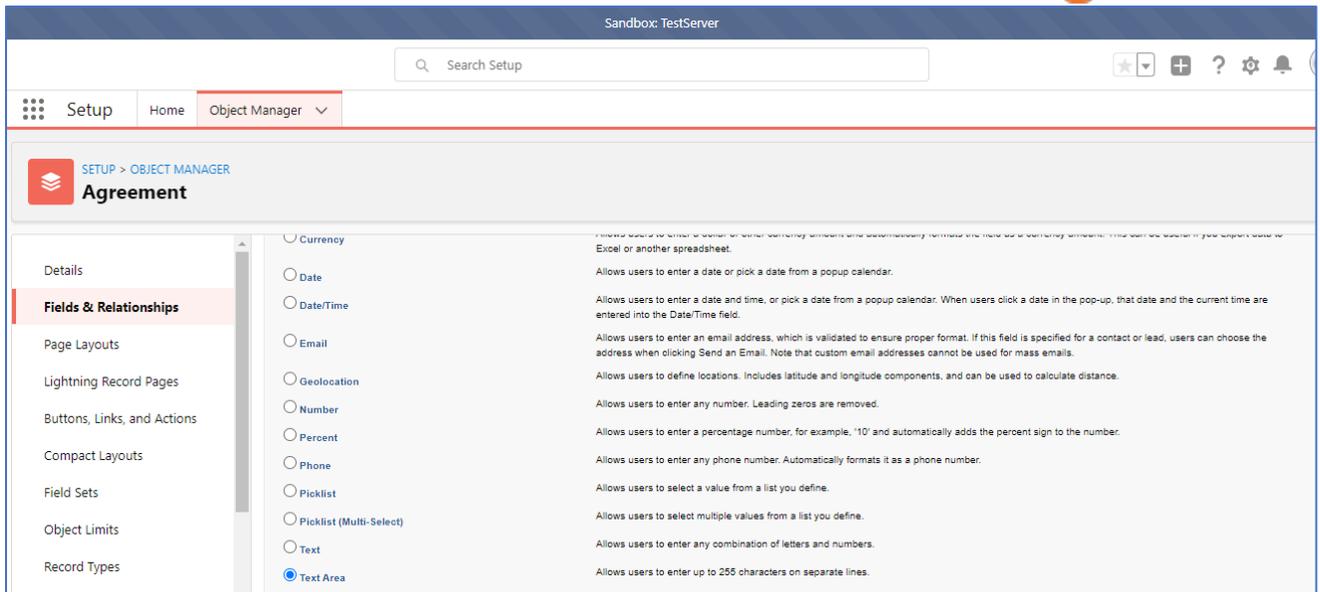
Data Type

None Selected Select one of the data types below.

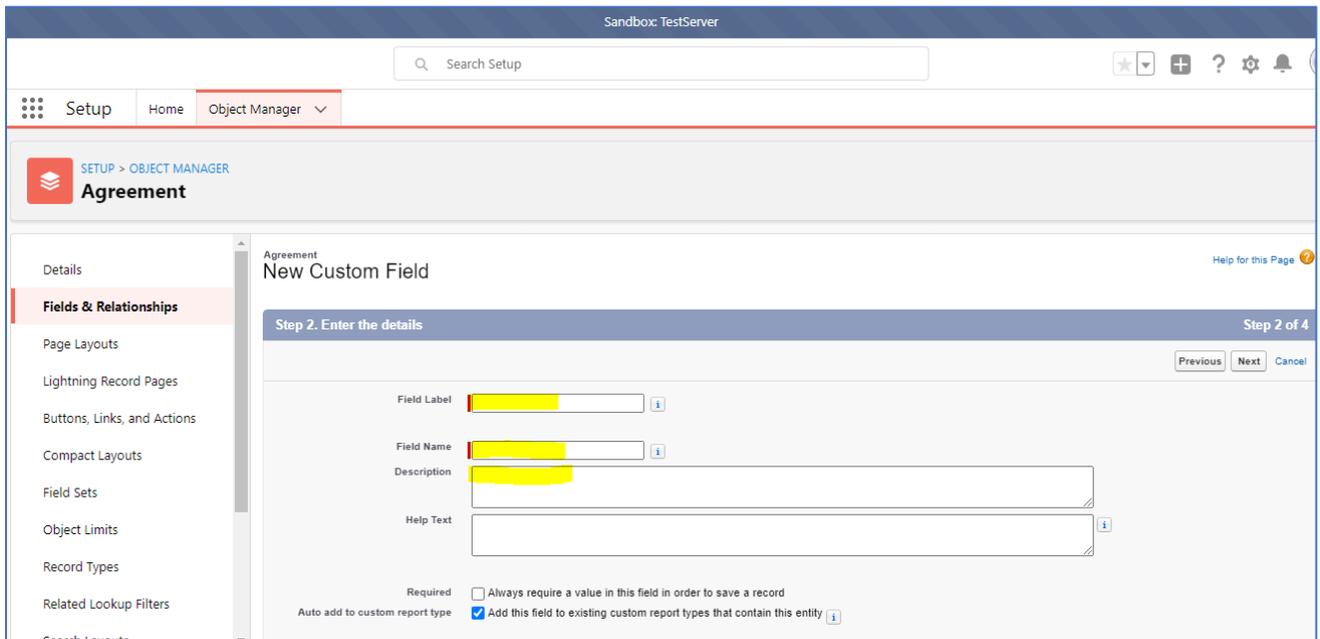
Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

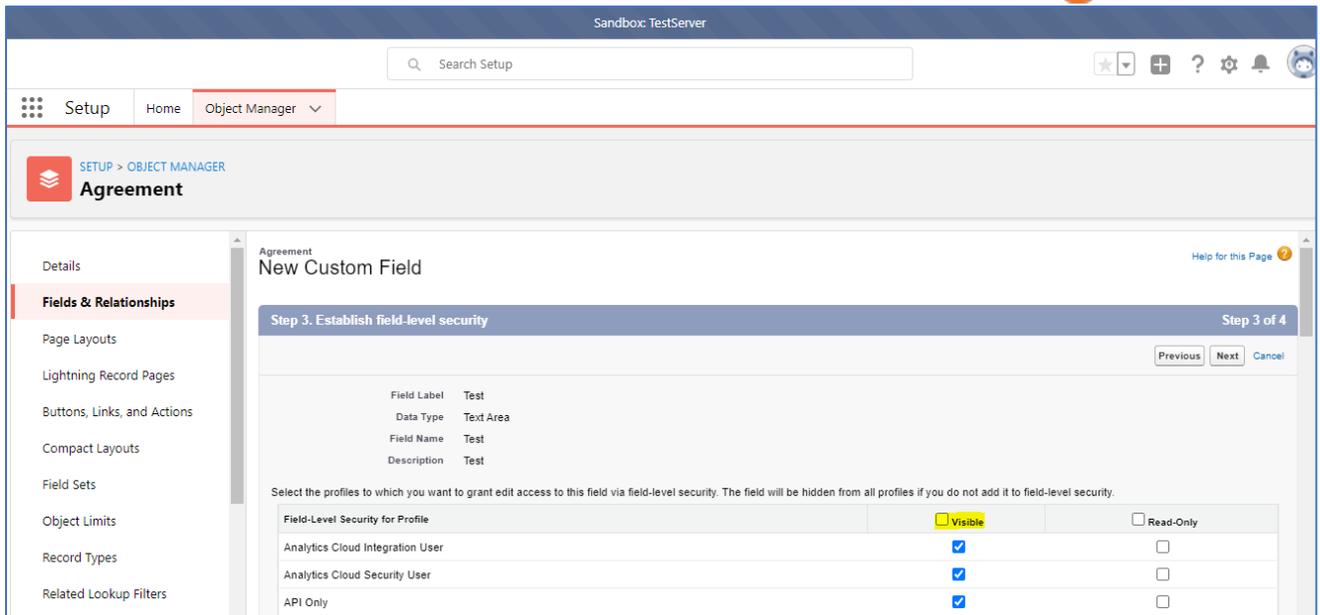
Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.



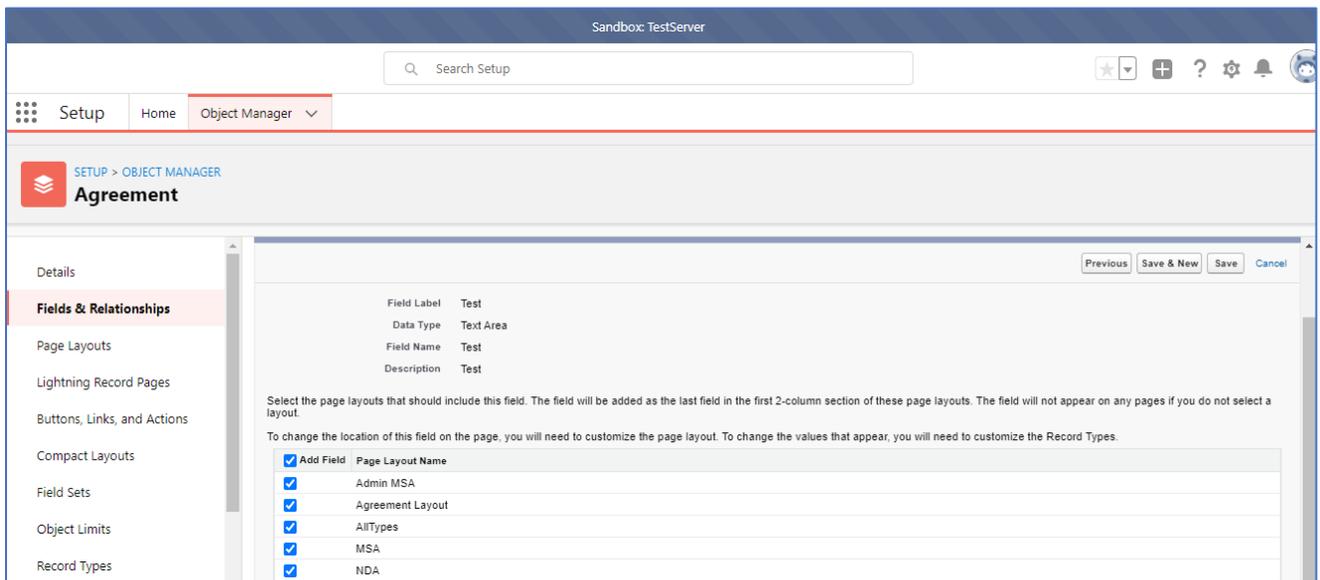
- b. Second step: Enter the custom field details like field label. After entering field label, the field name will appear automatically. Refer to the screenshot below.



- c. Third step: Define the security level that to which role the created custom field should be visible. Refer to the screenshot below.



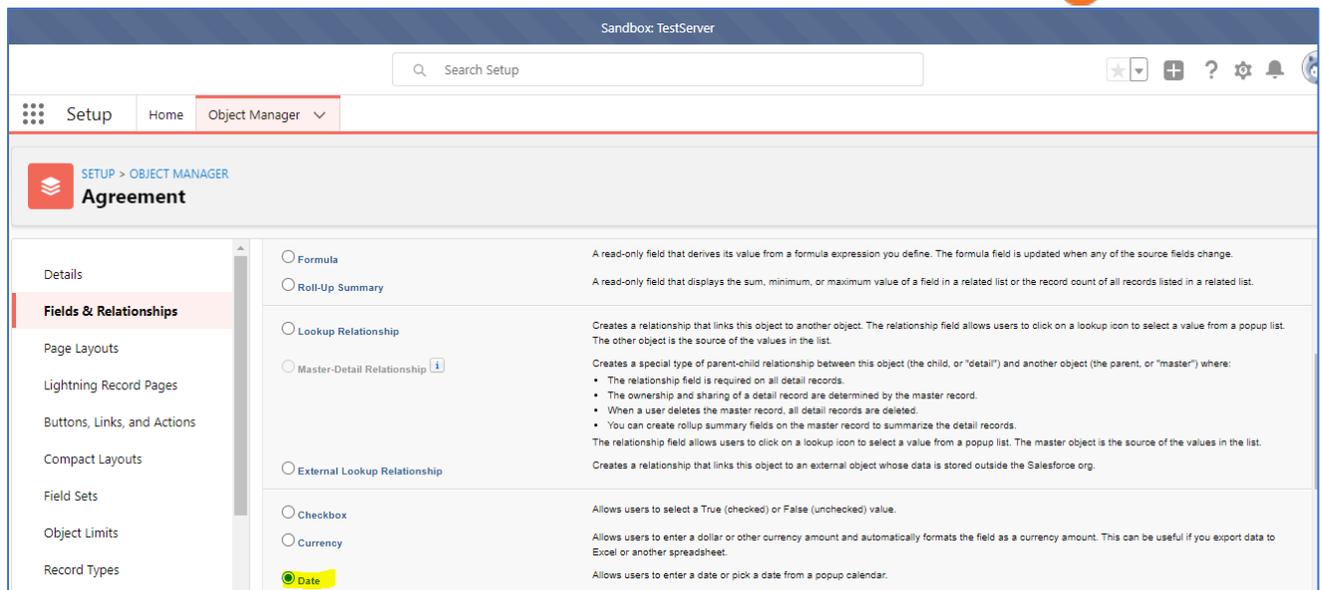
d. Fourth step: Define which type of page layout the created custom field should be visible. Refer to the screenshot below.



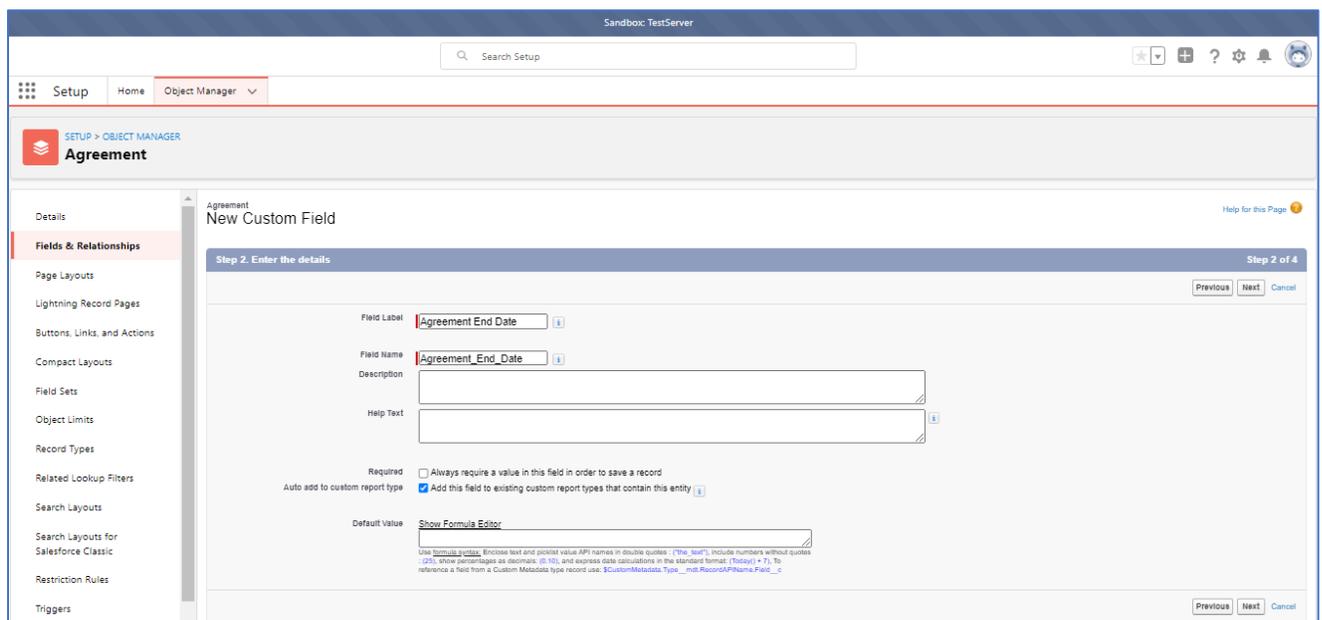
e. Click on 'Save'. A new custom field with the defined name will be created and shown in the list of available fields.

f. Refer to the screenshot below shows each step for the custom field "Agreement End Date". In this example, 'Agreement End Date' is considered as the 'Date' field and not the Formula field.

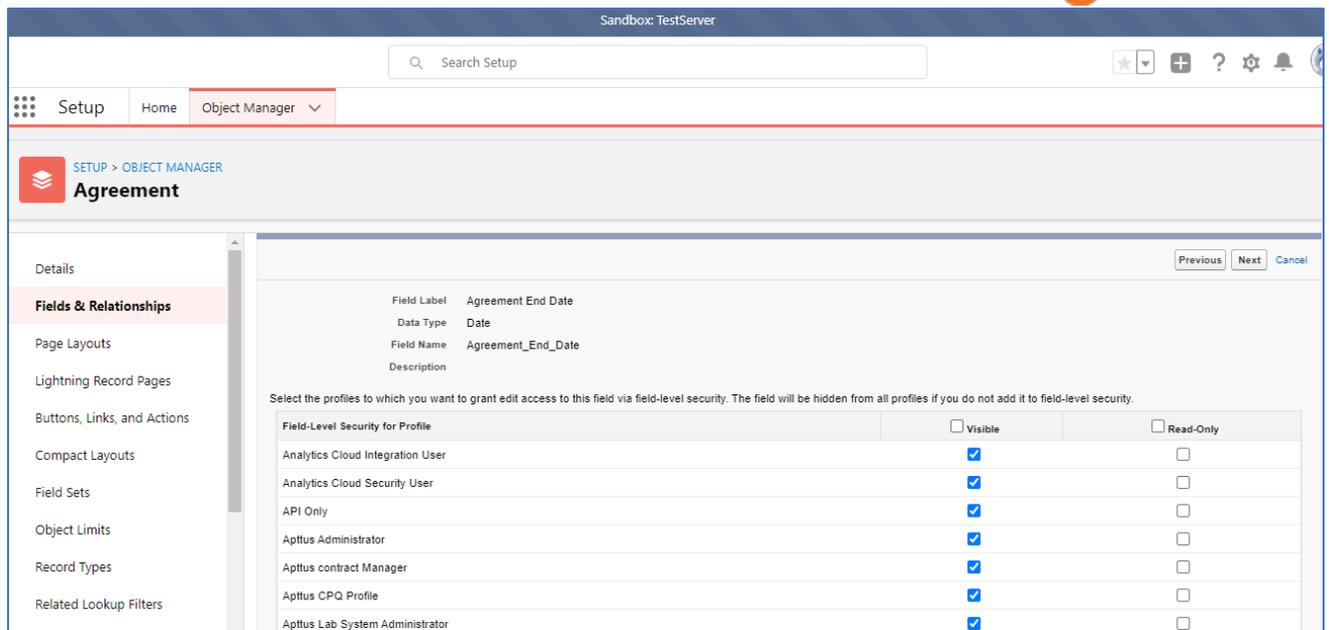
Step 1. Select Date option. Refer to the screenshot below:



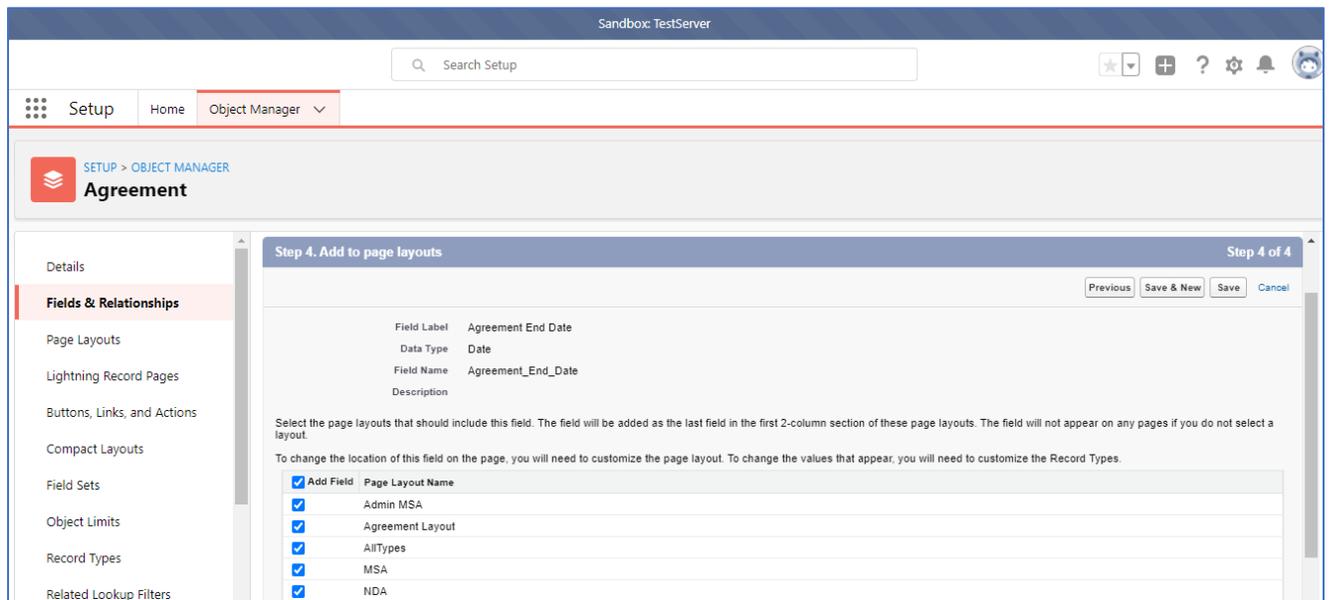
Step 2. Enter Field Label. Field Name will auto populate. Use has the ability to change the Field. Refer to the screenshot below:



Step 3. Select System Administrator for the Field-Level Security for Profile. In addition to System Administrator, other profiles can be selected depending on the requirement. Refer to the screenshot below:



Step 4. Select the required page layout from the list of layout shown, on which this fields is be displayed. Refer to the screenshot below:



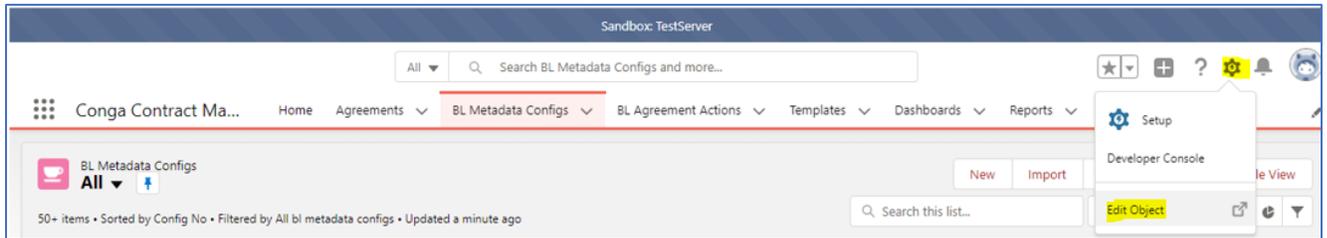
Click on 'Save' to show in the list of fields.

D. Add Agreement Field to Page Layout

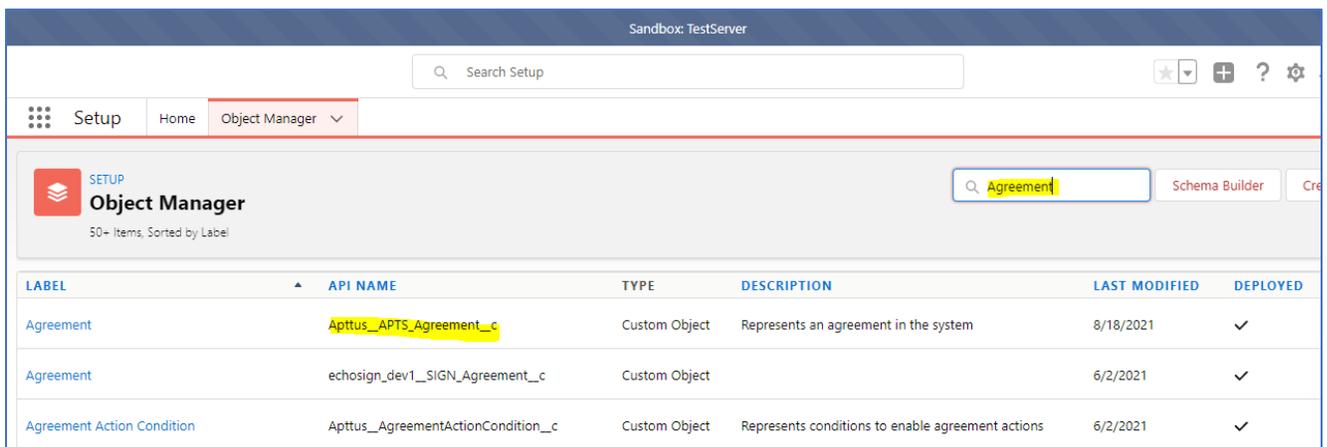
Once a custom field is created and defined in 'Fields and Relationship', the created field is to be added in a type of layout to show the attribute information in UI. There are predefined layouts available in CLM Platform application for different agreement types. These page layouts are customizable at Customer end.

Following steps required to add an Agreement Field to the Page Layout

1. Click on Gear Icon as shown in below screenshot. A small menu will appear. From that menu, click on Setup. Refer to the screenshot below.

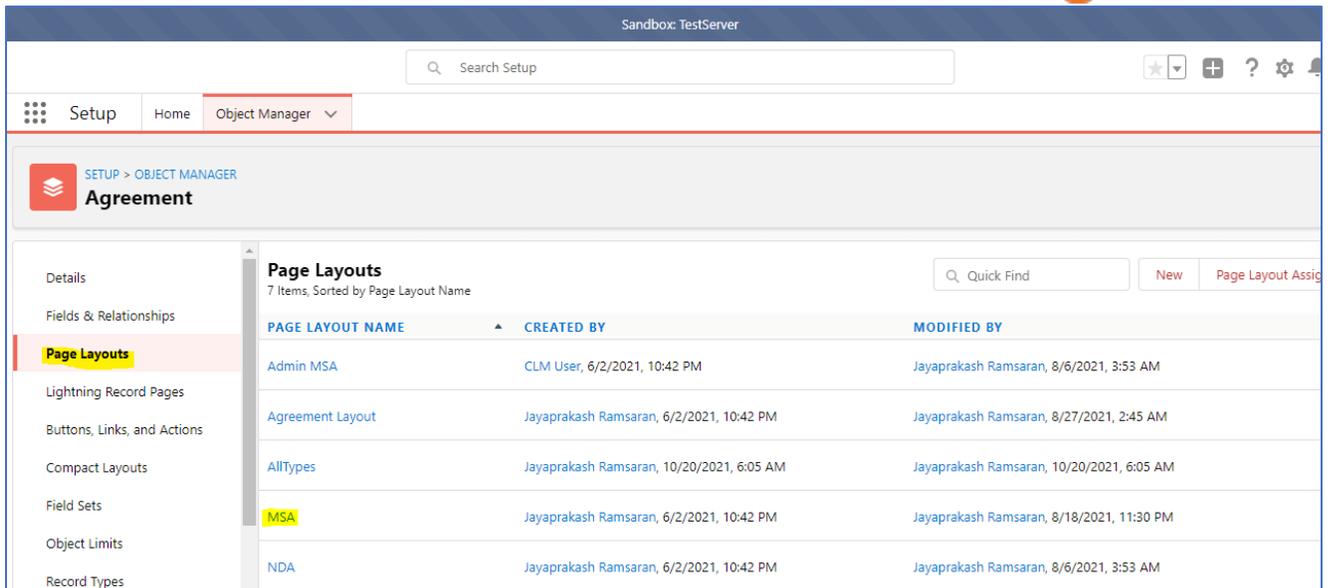


2. There will be two tabs "Home" and "Object Manager" tab. Click on Object Manager tab. Type 'Contract Agreement' in search box. Refer to the screenshot below.



Click on Agreement whose API_Name begins with 'Apttus__APTS_Agreement__c'.

3. From the list of options shown in left panel, navigate to 'Page Layout'. Refer to the screenshot below.



The screenshot shows the 'Object Manager' section for 'Agreement'. The 'Page Layouts' list is displayed with the following data:

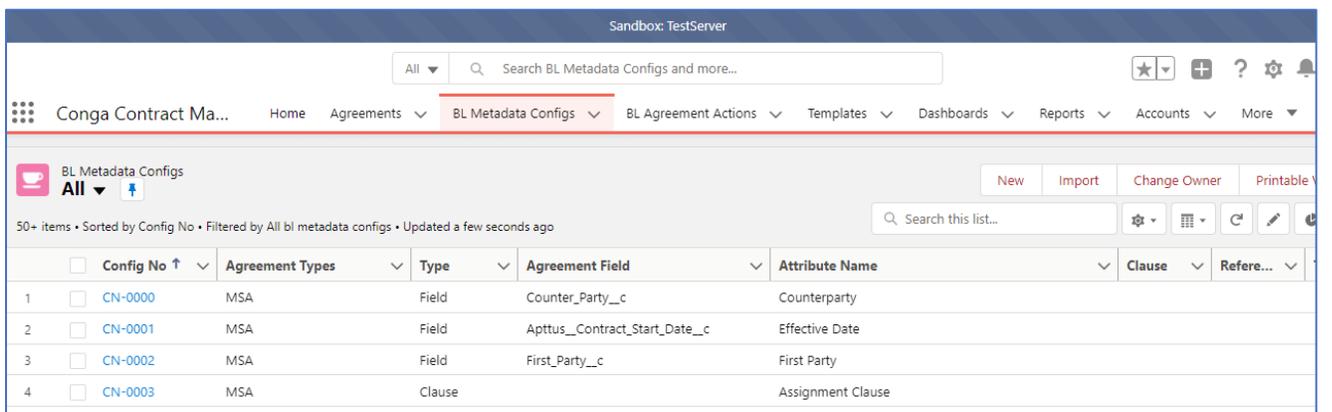
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Admin MSA	CLM User, 6/2/2021, 10:42 PM	Jayaprakash Ramsaran, 8/6/2021, 3:53 AM
Agreement Layout	Jayaprakash Ramsaran, 6/2/2021, 10:42 PM	Jayaprakash Ramsaran, 8/27/2021, 2:45 AM
AllTypes	Jayaprakash Ramsaran, 10/20/2021, 6:05 AM	Jayaprakash Ramsaran, 10/20/2021, 6:05 AM
MSA	Jayaprakash Ramsaran, 6/2/2021, 10:42 PM	Jayaprakash Ramsaran, 8/18/2021, 11:30 PM
NDA	Jayaprakash Ramsaran, 6/2/2021, 10:42 PM	Jayaprakash Ramsaran, 8/6/2021, 3:53 AM

4. On the right side, the list of all available Page Layouts defined for different agreement types will be displayed. Select **MSA** from Page Layout Name and add the Agreement Field in the section whichever you want.

E. Map Agreement Field with Attribute Name (with Type defined as Field)

Once the Attribute Names and Agreement Fields are defined and created, the next step is to map Agreement Field with Attribute Name. Following are the steps:

a) Navigate to BL Metadata Config tab. List of Attribute Names being configured will appear. Refer to the screenshot below.



The screenshot shows the 'BL Metadata Configs' list with the following data:

Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refere...
1	MSA	Field	Counter_Party__c	Counterparty		
2	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date		
3	MSA	Field	First_Party__c	First Party		
4	MSA	Clause		Assignment Clause		

b) As shown in the screenshot in highlighted, click on 'All' to view the full list of attributes. The column names. Refer to the screenshot below.

Sandbox: TestServer

All Search BL Metadata Configs and more...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

BL Metadata Configs All

New Import Change Owner Printable View

50+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Config No ↑	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refere...	Type
<input type="checkbox"/>	CN-0000	MSA	Field	Counter_Party__c	Counterparty			
<input type="checkbox"/>	CN-0001	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date			
<input type="checkbox"/>	CN-0002	MSA	Field	First_Party__c	First Party			
<input type="checkbox"/>	CN-0003	MSA	Clause		Assignment Clause			
<input type="checkbox"/>	CN-0004	MSA	Clause		Payment Obligations Clause			
<input type="checkbox"/>	CN-0005	MSA	Clause		Indemnity Clause			
<input type="checkbox"/>	CN-0006	MSA	Clause		Insurance Clause			
<input type="checkbox"/>	CN-0007	MSA	Clause		Dispute Resolution Clause			

- In the list shown, there are two columns “Agreement Field” and “Attribute Name”
- Click on Edit pencil in front of any Agreement Field against any “Attribute Name”
- Type the name of the Agreement Field which was created. For example, if the Agreement Field “First_Party__c” is created for Attribute Name “First Party”. Then for First Party attribute, click on edit pencil in column Agreement Field and enter the Agreement Field Name as “First_Party__c”.
- Click on Save. Refer to the screenshot below.

Sandbox: TestServer

All Search BL Metadata Configs and more...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

BL Metadata Configs All

New Import Change Owner

50+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated a minute ago

Search this list...

<input type="checkbox"/>	Config No ↑	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refere...
<input type="checkbox"/>	CN-0000	MSA	Field	Counter_Party__c	Counterparty		
<input type="checkbox"/>	CN-0001	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date		
<input type="checkbox"/>	CN-0002	MSA	Field	First_Party__c	First Party		
<input type="checkbox"/>	CN-0003	MSA	Clause		Assignment Clause		

Sandbox: TestServer

All Search BL Metadata Configs and more...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

BL Metadata Configs All

New Import Change Owner Printable View

50+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated 2 minutes ago

Search this list...

Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refere...
1	MSA	Field	Counter_Party__c	Counterparty		
2	MSA	Field	Apttus__Contract_Start_Date__c	Effective Date		
3	MSA	Field	First_Party__c	First Party		
4	MSA	Clause		Assignment Clause		
5	MSA	Clause		Payment Obligations Clause		
6	MSA	Clause		Indemnity Clause		
7	MSA	Clause		Insurance Clause		
8	MSA	Clause		Dispute Resolution Clause		
9	MSA	Field	Governing_Law__c	Governing Law		
10	MSA	Field	Name	Agreement Title		
11	MSA	Field	Apttus__Term__Months__c	Agreement Term		

Cancel Save

Note: For illustration purpose, the Agreement Action buttons mapping shown below is for the Record Type 'MSA'. To display these buttons for a particular Record Type, these buttons are to be mapped to that specific Record Type.

F. Map Custom Agreement Action buttons [Brightleaf TPP Import, Brightleaf TPP Import Review]

Once all the meta-data fields and clauses are created, the created Record Type 'MSA' is to map with the Agreement Action Buttons so that user can perform an action i.e., Brightleaf TPP Import or Brightleaf TPP Import review.

There are two custom Agreement Action buttons for TPP upload/import and the TPP data review. These action buttons are mapped with some set of Record Types. The action buttons will be displayed only for the Record Types selected for these action buttons. Refer to the screenshot below.

Sandbox: TestServer

All Search BL Agreement Actions and more...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

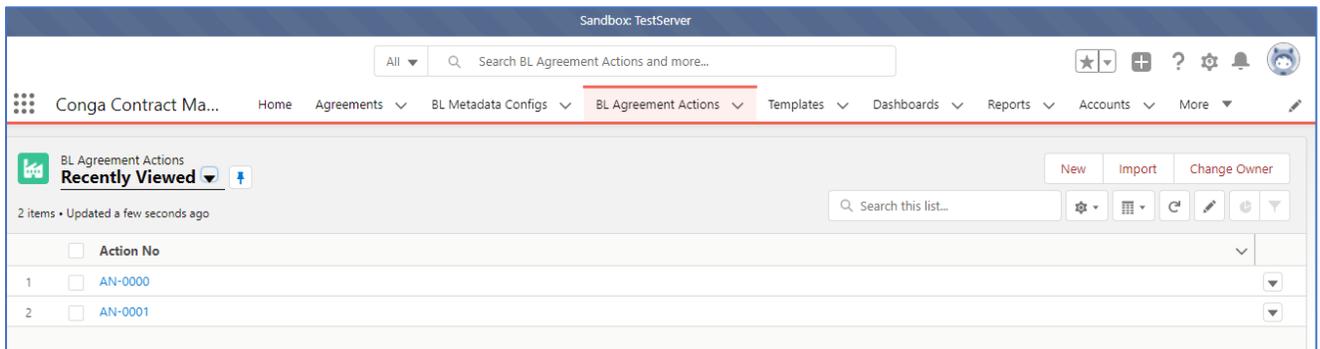
BL Agreement Actions Recently Viewed

New Import Change Owner

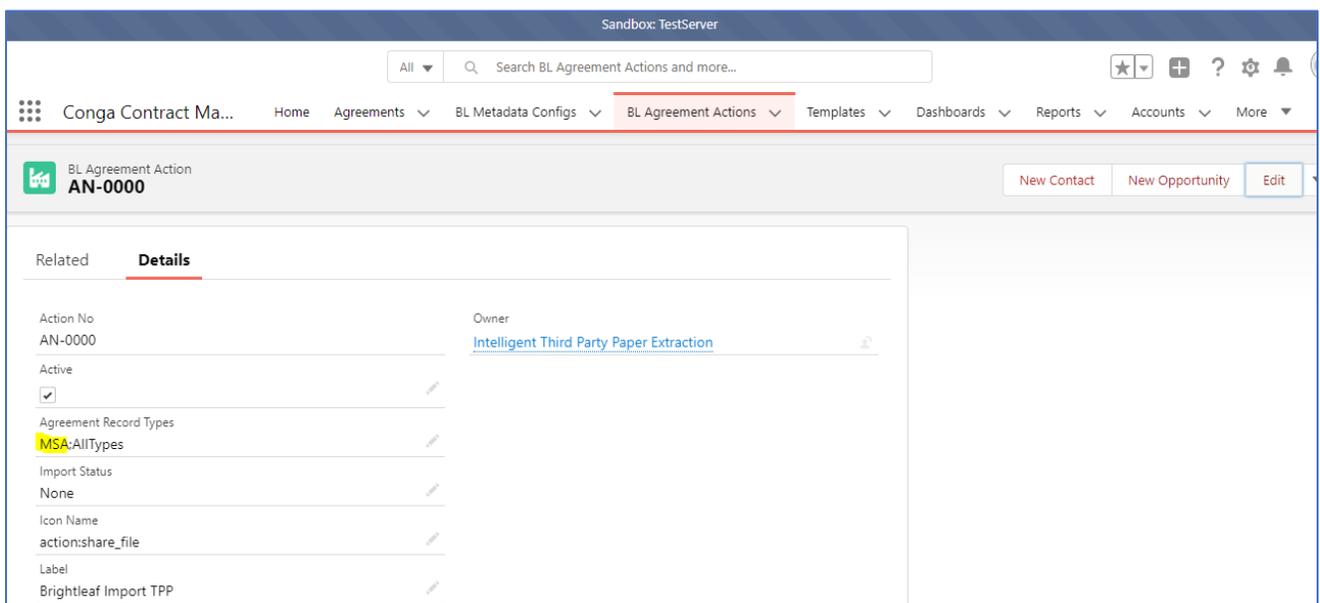
2 items LIST VIEWS

Search this list...

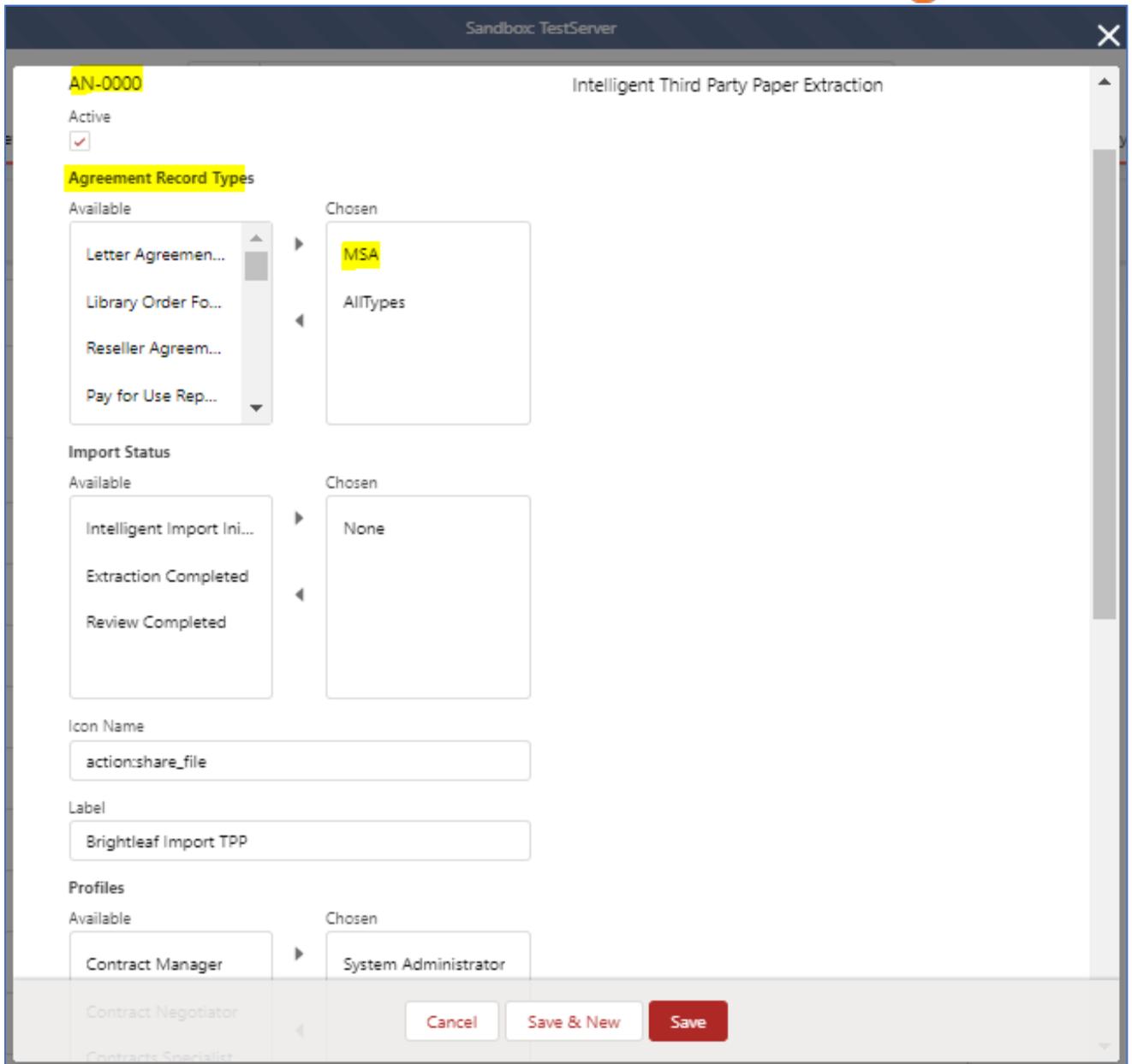
1	Recently Viewed (Pinned list)
2	AN-0001



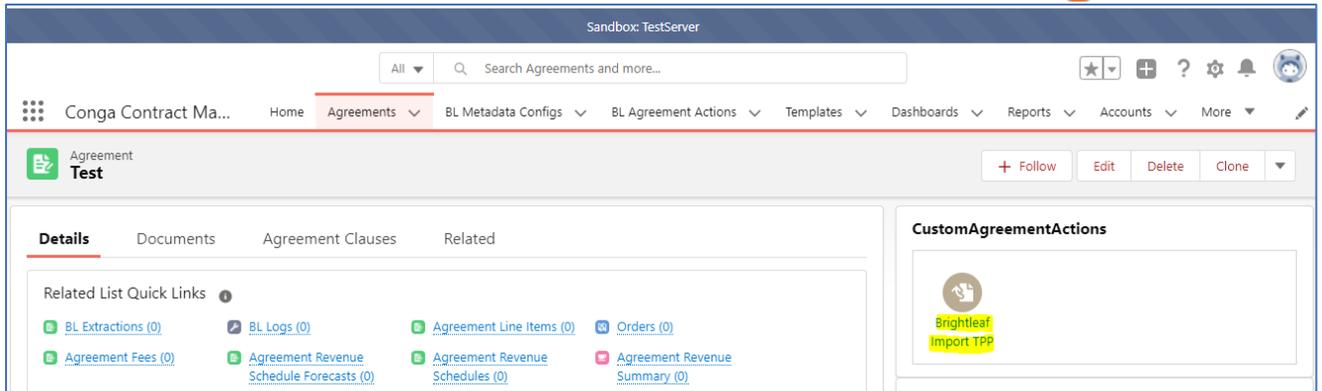
To get these action buttons on a particular record type, click on edit for the action labelled under 'Action No' in column against any row. Refer to the screenshot below.



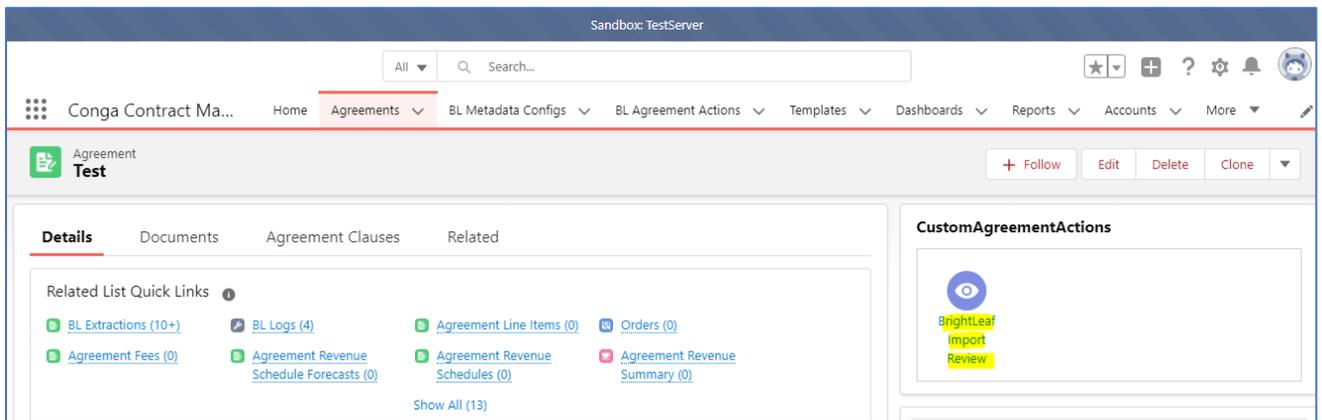
On click of edit button will show all the details of that Action button in editable form. From the available list of Agreement Record Types, select 'MSA' to appear the button on the Agreement page layout of 'MSA' record type. Refer to the screenshot below.



The custom Agreement Action Brightleaf TPP Import will appear on creating a New Agreement. Refer to the screenshot below.

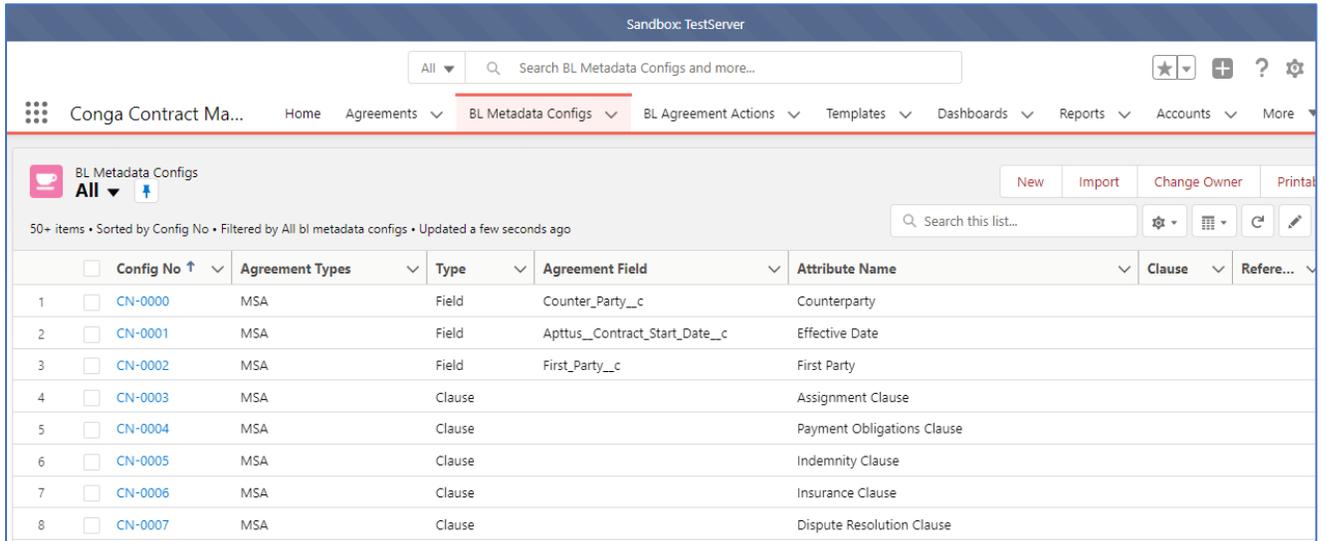


The custom Brightleaf TPP Import Review will appear once the success full extraction is completed.



G. List of Created Attributes

Once attributes are created, the list is shown on BL Metadata Config tab. Navigate to BL Metadata Config tab. List of Attribute Names being configured will appear. Refer to the screenshot below.



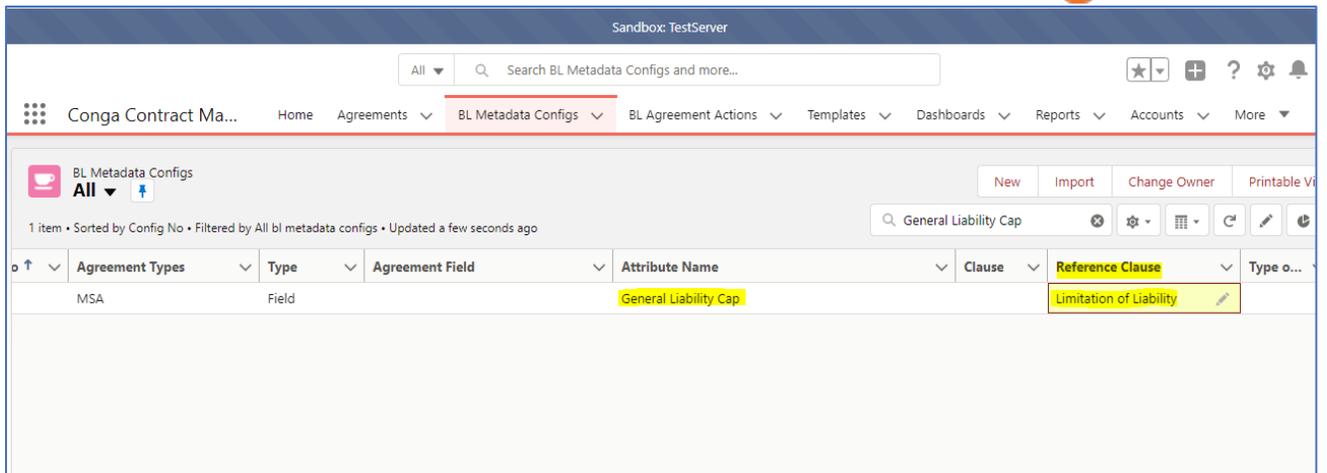
Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause	Refere...
1	MSA	Field	Counter_Party__c	Counterparty		
2	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date		
3	MSA	Field	First_Party__c	First Party		
4	MSA	Clause		Assignment Clause		
5	MSA	Clause		Payment Obligations Clause		
6	MSA	Clause		Indemnity Clause		
7	MSA	Clause		Insurance Clause		
8	MSA	Clause		Dispute Resolution Clause		

H. Map Attribute Name with Attribute Clause (Reference Clause)

On the BL Metadata Config tab, there is an option to map Attribute Name (Field) with another Attribute Name (Clause). This is mapping is for the 'Reference Clause'. This helps to view the clause details from which the meta data field information is captured (without navigating to the Clause Tab). The clause which is being referred to/mapped with metadata field is called Reference Clause.

Following is an example:

- Create a metadata field Attribute Name "General Liability Cap"
- Create a clause "Limitation of Liability" and give its standard text.
- In the Attributes List, there is column called "Reference Clause"
- Against the attribute "General Liability Cap", click on edit pencil in column "Reference Clause"
- Give the name of clause "Limitation of Liability" and click on Save.
- Refer to the screenshot below which will appear after performing steps a) to e)



Clause Library

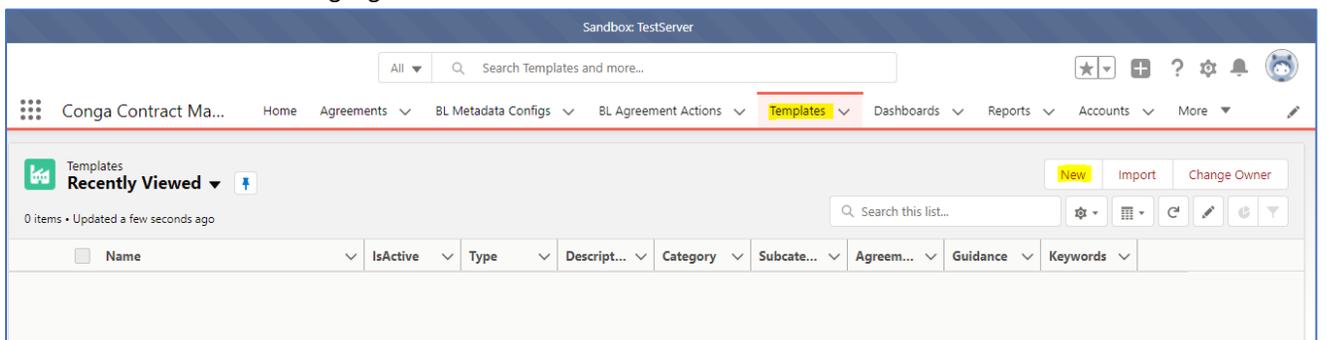
The Clause Library is the place where all the standard language of different clauses are defined and configured. The standard language of any clause will be used for the redlining purpose to show what is the deviation of the extracted clause text w.r.t to the defined standard clause from an agreement.

To use this feature, the configuration is done in two steps:

1. Creation of standard clause
2. Map standard clause text with clause

A. Creation of Standard Clause Text

1. To define standard language for a clause, navigate to Templates tab from header. It will display the list of existing clauses for which standard language has been defined. Refer to the screenshot below.



2. From the top-right, click on 'New' to create/define a standard language for a clause. Refer to the screenshot below.

Sandbox: TestServer

New Template

Information

Name Complete this field.

Owner
Jayaprakash Ramsaran

Type
Agreement
View all dependencies

Cloned From

Reference

Cloned From Reference

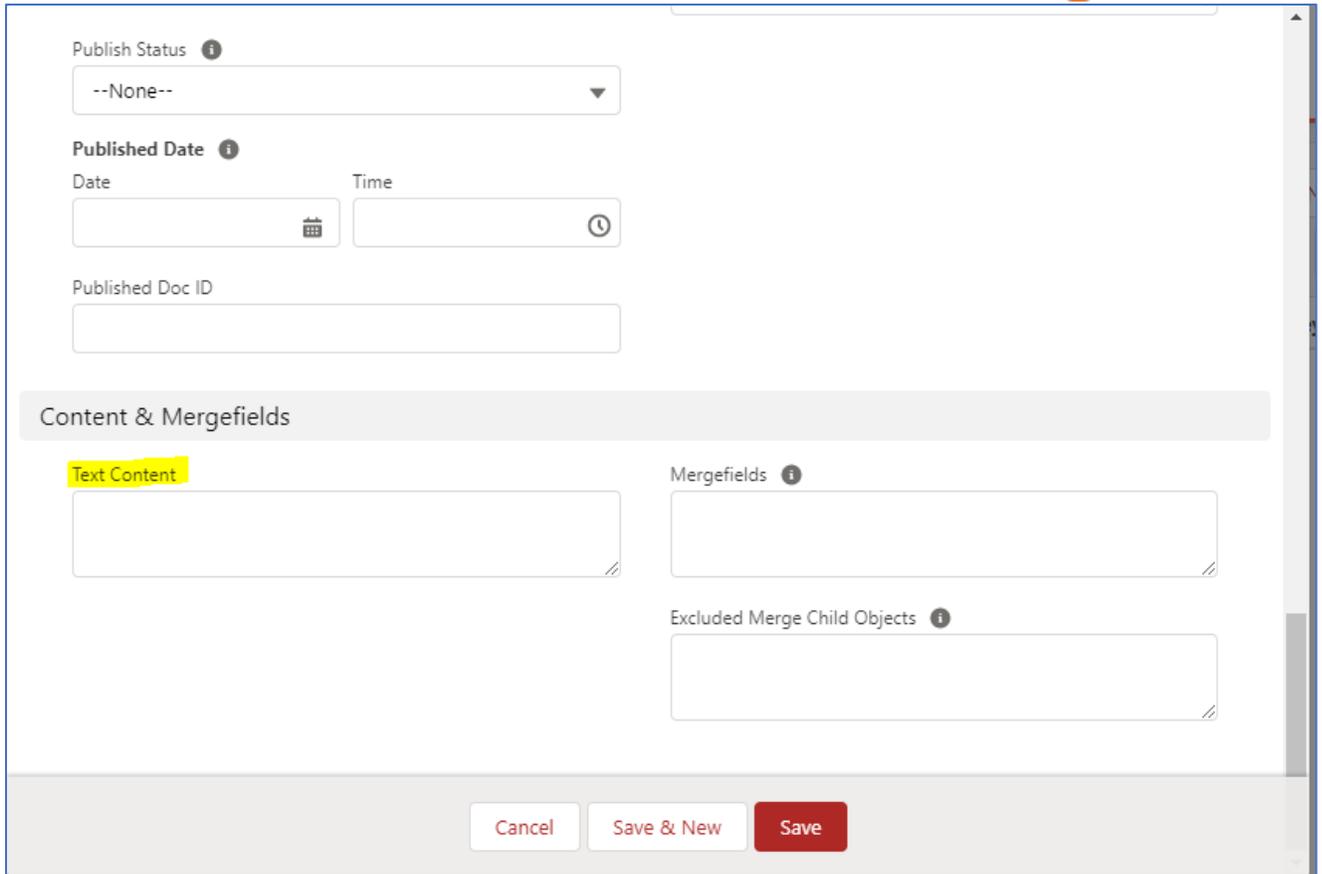
Description

Term Exception

Agreement Types

Available	Chosen
Default	
MSA	

Keywords



Publish Status ⓘ
--None--

Published Date ⓘ
Date Time
Published Doc ID

Content & Mergefields

Text Content

Mergefields ⓘ

Excluded Merge Child Objects ⓘ

Cancel Save & New Save

3. For example, to create standard language for 'Assignment Clause', following steps are performed:
 - a. Enter Name as 'Assignment Clause'
 - b. Select type as 'Clause'
 - c. Select Agreement Type as 'Default' or 'MSA' as any other type based on the requirement.
 - d. Enter Content Type for the clause text.
 - d. Once above information filled, click on Save.Refer to the screenshot below.

New Template

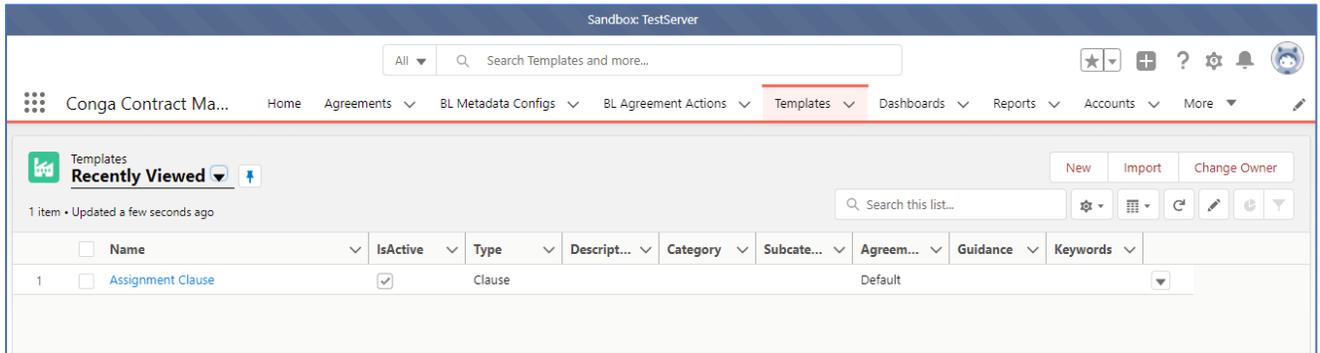
Information

<p>* Name</p> <input type="text" value="Assignment Clause"/>	<p>Owner</p> <p> Jayaprakash Ramsaran</p>								
<p>Type</p> <p>Clause</p> <p><small>View all dependencies</small></p>	<p>Cloned From</p> <input type="text" value="Search Templates..."/>								
<p>Reference</p> <input type="text"/>	<p>Cloned From Reference</p> <input type="text"/>								
<p>Description</p> <input type="text"/>	<p>Term Exception</p> <input type="text" value="Search Term Exceptions..."/>								
<p>Agreement Types</p> <table border="1"><thead><tr><th>Available</th><th>Chosen</th></tr></thead><tbody><tr><td>MSA</td><td>Default</td></tr><tr><td>NDA</td><td></td></tr><tr><td>Proposal</td><td></td></tr></tbody></table>	Available	Chosen	MSA	Default	NDA		Proposal		<p>Keywords</p> <input type="text"/>
Available	Chosen								
MSA	Default								
NDA									
Proposal									

Content & Mergefields

<p>Text Content</p> <p>This Agreement may not be transferred, sublicensed or assigned by Vendor to any other person or entity</p>	<p>Mergefields</p> <input type="text"/>
	<p>Excluded Merge Child Objects</p> <input type="text"/>

The created clause will appear in the list of available templates. Refer to the screenshot below.



Sandbox: TestServer

All Search Templates and more...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions **Templates** Dashboards Reports Accounts More

Templates **Recently Viewed** New Import Change Owner

1 item • Updated a few seconds ago Search this list...

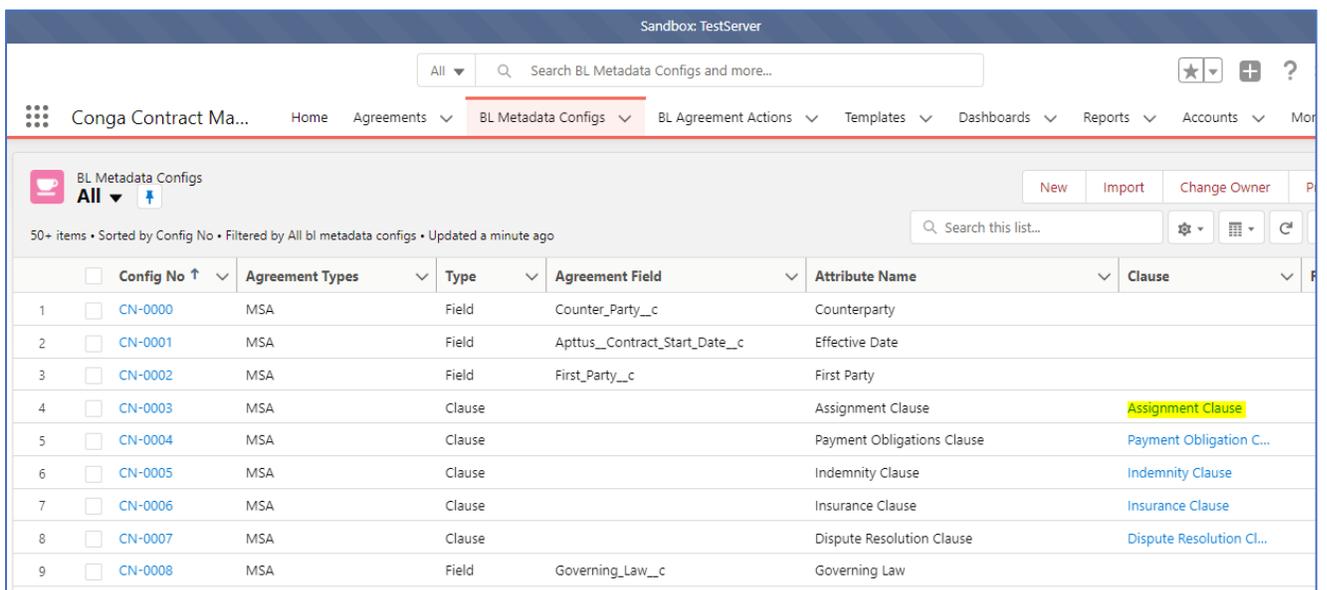
<input type="checkbox"/>	Name	IsActive	Type	Descript...	Category	Subcate...	Agreem...	Guidance	Keywords
<input type="checkbox"/>	Assignment Clause	<input checked="" type="checkbox"/>	Clause				Default		

B. Map Standard Clause Text with clause

Once the standard language for a clause is defined and created, the next step is to map the standard language with the attribute created as clause. For example, to map standard language for Assignment Clause, following steps to be performed:

- Navigate to BL Metadata Config tab.
- Click on the clause created. For example, click on the Assignment Clause
- There is a column named 'Clause'. For the Assignment Clause, click on edit pencil in this column. List of standard clauses will appear.
- Select standard clause name 'Assignment Clause' (which is created in the above step) and click on 'Save'.

Refer to the screenshot below.



Sandbox: TestServer

All Search BL Metadata Configs and more...

Conga Contract Ma... Home Agreements **BL Metadata Configs** BL Agreement Actions Templates Dashboards Reports Accounts Mor

BL Metadata Configs **All** New Import Change Owner P

50+ items • Sorted by Config No • Filtered by All bl metadata configs • Updated a minute ago Search this list...

<input type="checkbox"/>	Config No	Agreement Types	Type	Agreement Field	Attribute Name	Clause
<input type="checkbox"/>	CN-0000	MSA	Field	Counter_Party__c	Counterparty	
<input type="checkbox"/>	CN-0001	MSA	Field	Apttus_Contract_Start_Date__c	Effective Date	
<input type="checkbox"/>	CN-0002	MSA	Field	First_Party__c	First Party	
<input type="checkbox"/>	CN-0003	MSA	Clause		Assignment Clause	Assignment Clause
<input type="checkbox"/>	CN-0004	MSA	Clause		Payment Obligations Clause	Payment Obligation C...
<input type="checkbox"/>	CN-0005	MSA	Clause		Indemnity Clause	Indemnity Clause
<input type="checkbox"/>	CN-0006	MSA	Clause		Insurance Clause	Insurance Clause
<input type="checkbox"/>	CN-0007	MSA	Clause		Dispute Resolution Clause	Dispute Resolution Cl...
<input type="checkbox"/>	CN-0008	MSA	Field	Governing_Law__c	Governing Law	

Creation of Agreement

Once all the metadata fields and the clauses are configured, then one can proceed to create an Agreement within CLM application and upload a TPP agreement.

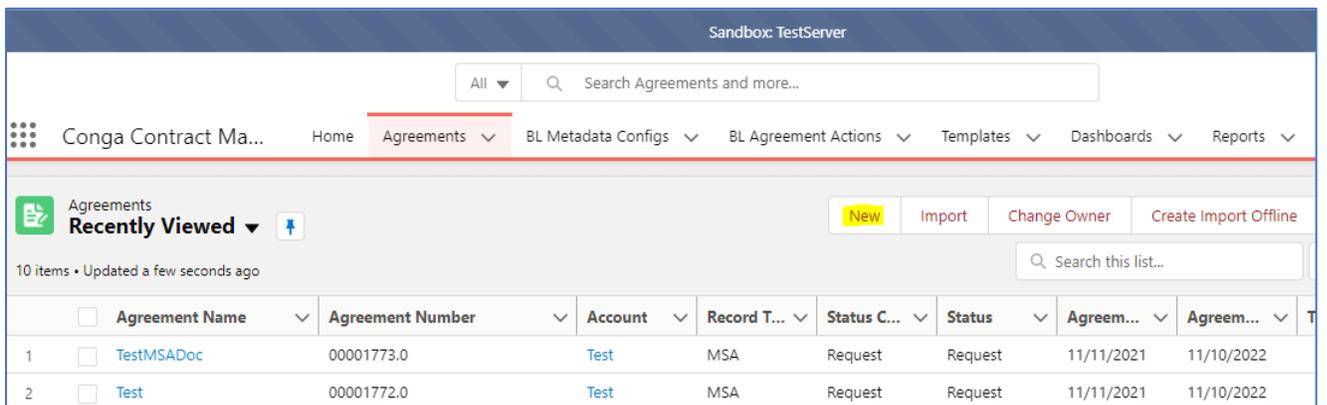
Following sections explain the creation of an Agreement

- A. Select Record Type
- B. Upload TPP Agreement
- C. Extract from Brightleaf

A. Select Record Type

To create an Agreement, first user has to select a Record Type. CLM application will show the list of pre-configured types with radio buttons. User has to select one type in which the TPP agreement falls under.

1. Navigate to the Contract Agreements tab in CLM application. Click on 'New'. Refer to the screenshot below.



The screenshot shows the 'Agreements' tab in the Conga Contract Management application. The interface includes a search bar, navigation tabs, and a table of 'Recently Viewed' items. The table has columns for Agreement Name, Agreement Number, Account, Record Type, Status, and dates.

	Agreement Name	Agreement Number	Account	Record T...	Status C...	Status	Agreem...	Agreem...
1	TestMSADoc	00001773.0	Test	MSA	Request	Request	11/11/2021	11/10/2022
2	Test	00001772.0	Test	MSA	Request	Request	11/11/2021	11/10/2022

2. Select one of the record types of which agreement is to be uploaded.

Sandbox: TestServer

All ▾ Search Agreements and more...

Home Agreements ▾ BL Metadata Configs ▾ BL Agreement Actions ▾ Templates ▾ Dashboards ▾ Reports ▾

New Agreement

Select a record type

- MSA
- AllTypes
- NDA
Non-Disclosure Agreement
- RevRec
RevRec
- SOW
Statement of Work

Cancel Next

- Next, fill the basic information like Agreement Name, Account Name. The Status Category and Status should be 'Request' and Brightleaf Import Status should be 'None'

Sandbox: TestServer

New Agreement: MSA

Information

* Agreement Name TestMSADoc	Status Category Request <small>View all dependencies</small>
* Account Test	Status --None-- <small>View all dependencies</small>
Legal Entity Id Search Legal Entities...	Requestor Search People...
Currency USD - U.S. Dollar	Owner Jayaprakash Ramsaran
ERF Favorite Color --None--	Record Type MSA
Counter Party	Brightleaf Import Status

Cancel Save & New Save

Upload TPP Agreement

To upload a TPP Agreement, click on the 'Brightleaf Import TPP' action button on agreement detail page to upload TPP agreement.

Sandbox: TestServer

All Search Agreements and more...

Conga Contract Ma... Home **Agreements** BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

Agreement **TestMSADoc** + Follow Edit Delete Clone

Agreement Number	Account	Agreement Start Date	Agreement End Date	Approval Status	Owner
00001773.0	Test	11/11/2021	11/10/2022	Not Submitted	Jayaprakash Ramsaran

Details Documents Agreement Clauses Related

Related List Quick Links

- BL Extractions (0)
- BL Logs (0)
- Agreement Line Items (0)
- Orders (0)
- Agreement Fees (0)
- Agreement Revenue Schedule Forecasts (0)
- Agreement Revenue Schedules (0)
- Agreement Revenue Summary (0)

Show All (13)

Agreement Number: 00001773.0 Status Category: Request

CustomAgreementActions

Brightleaf Import TPP

Agreement Actions

Agreement Lifecycle Actions

1. Upload screen will appear and click on upload button. Refer to the screenshot below.

Sandbox: TestServer

All Search...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

Agreement Name	Agreement Number	Agreement Type	Account
TestMSADoc	00001773.0	MSA	Test

Attributes Quota Used : 80/15000
Ocr Quota Used : 7/1000
Documents Quota Used : 7/1000

Import Third Party Paper

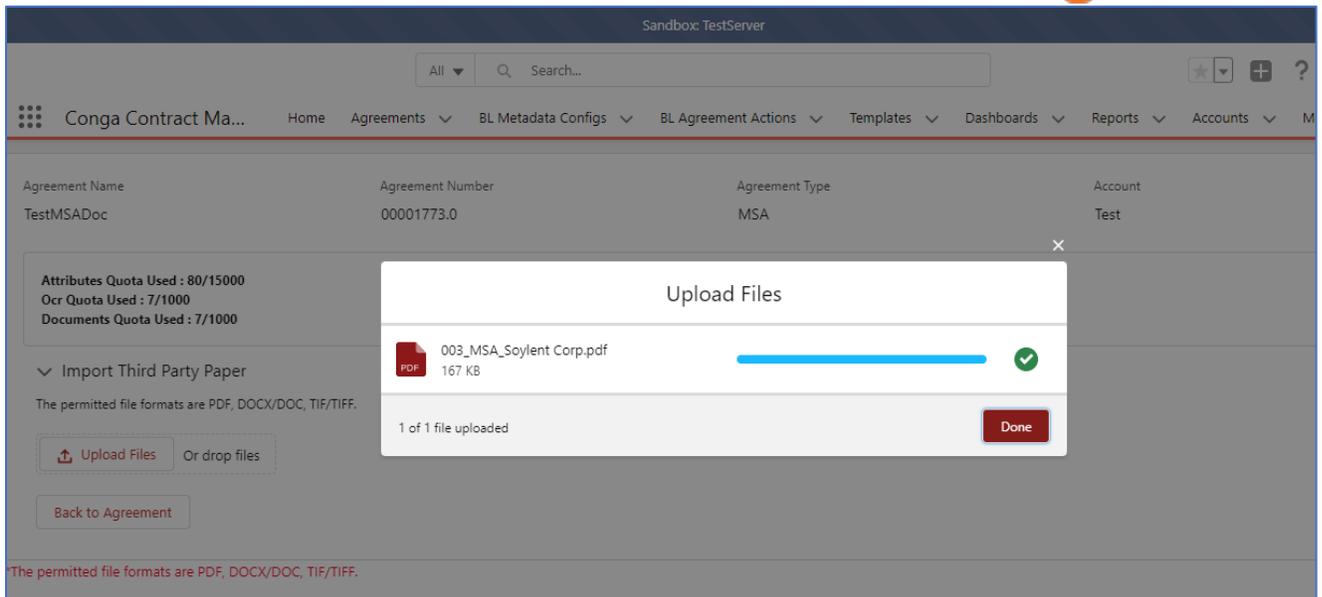
The permitted file formats are PDF, DOCX/DOC, TIF/TIFF.

Upload Files Or drop files

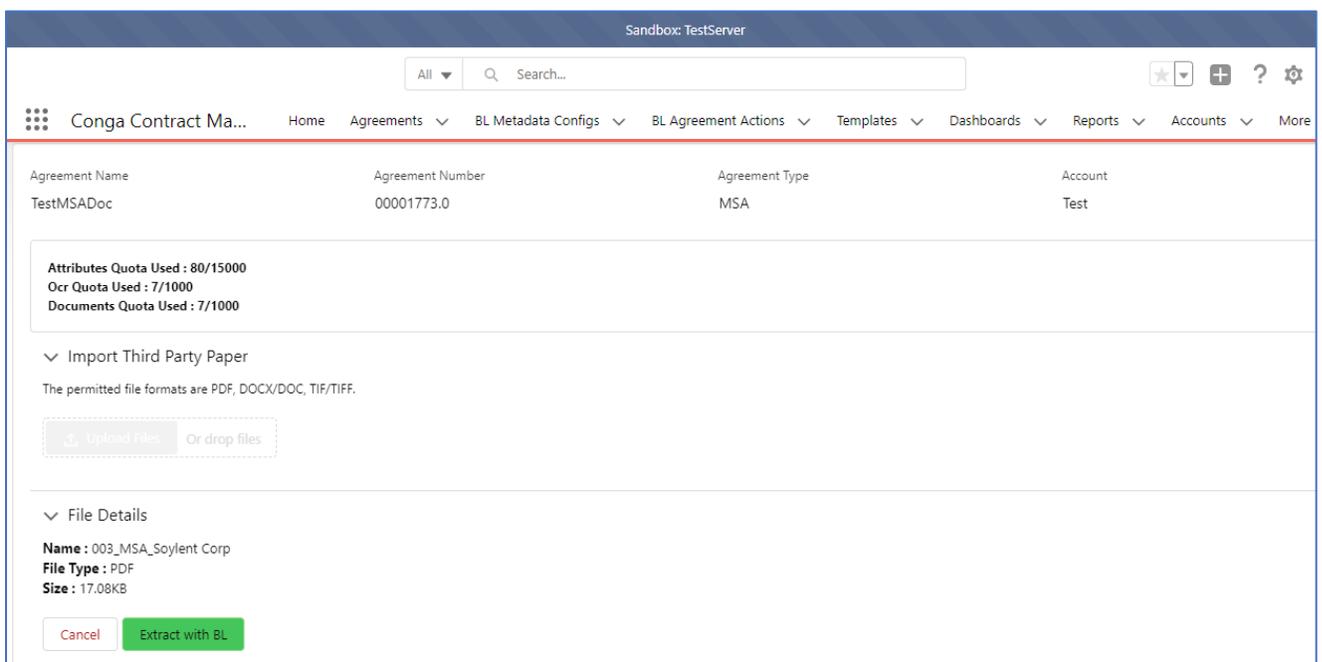
Back to Agreement

*The permitted file formats are PDF, DOCX/DOC, TIF/TIFF.

2. On upload of the agreement, success upload confirmation appears. Refer to the screenshot below.



- On successful upload, click on Done. 'Extract with BL' button appears.

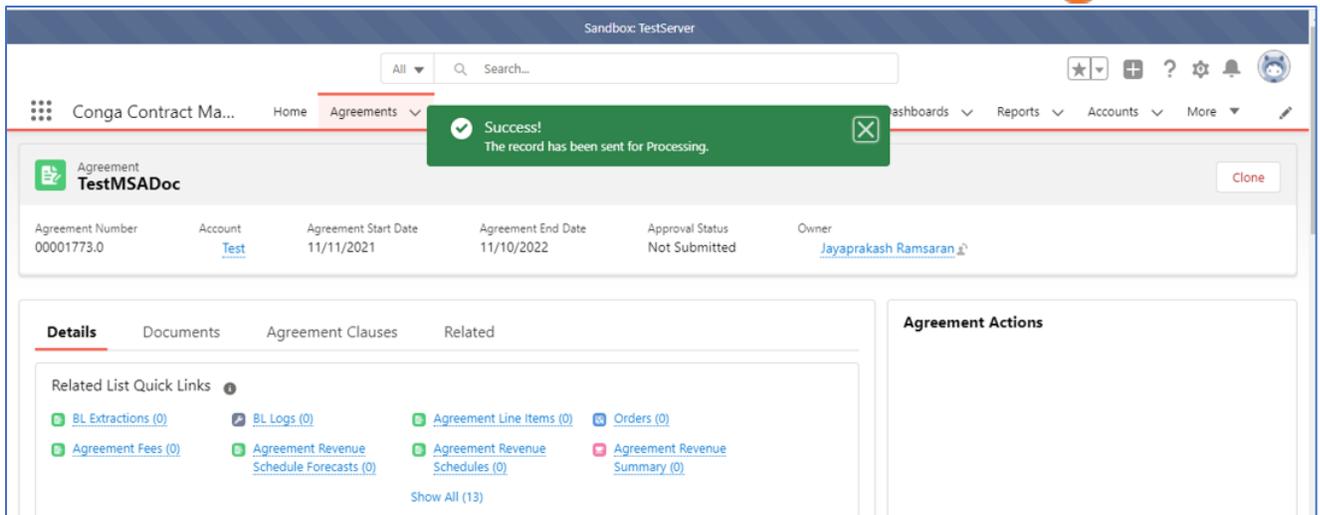


B. Extract from Brightleaf

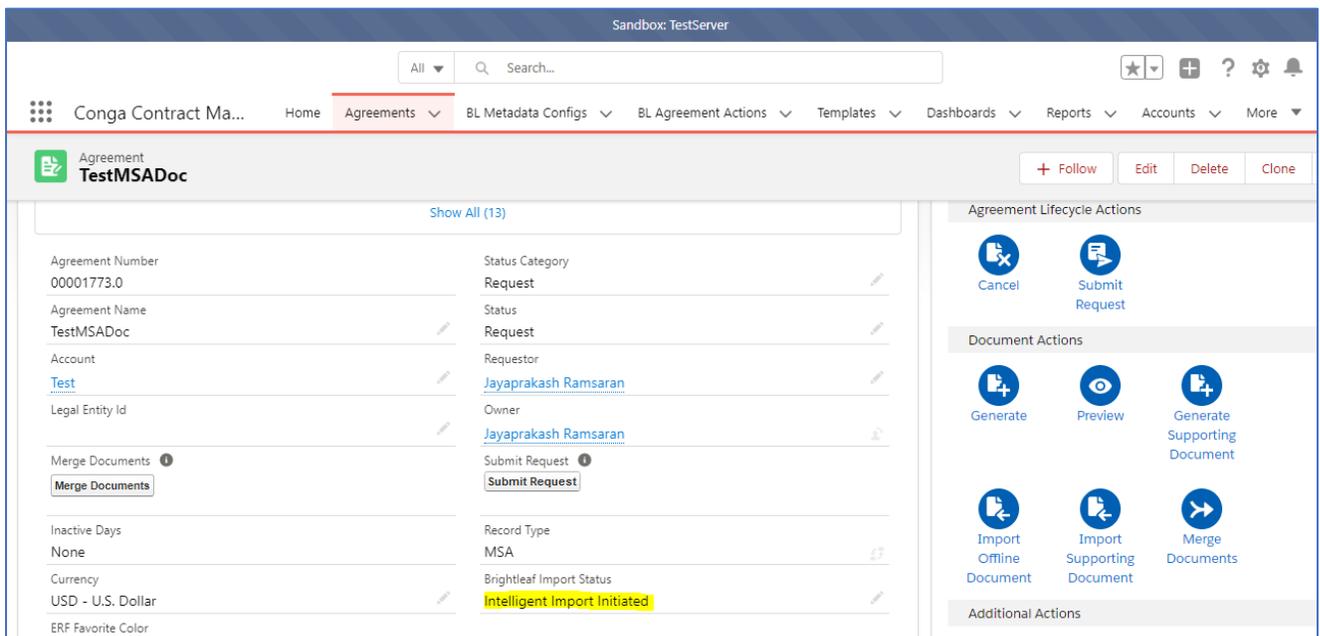
- Click on 'Extract with BL'. It pulls the attributes information. The Brightleaf Import Status to 'Intelligent Import Initiated'. Refer to the screenshots below.

Screenshot - 1

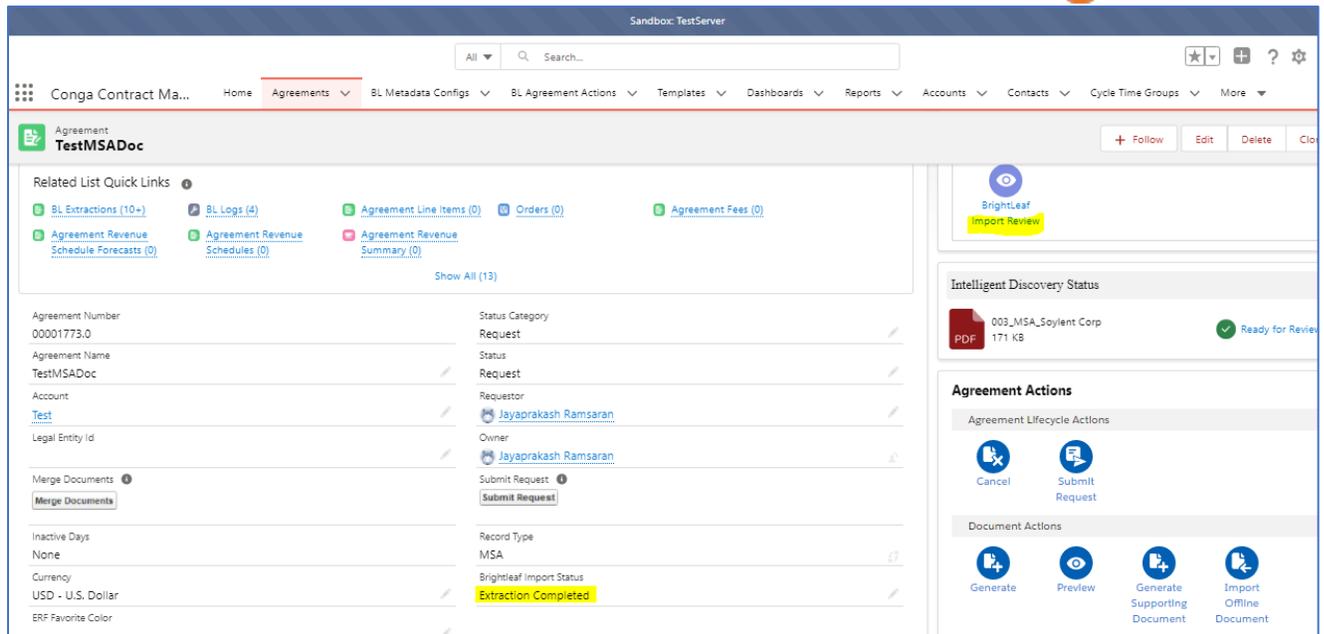
Copyright © 2021 Brightleaf Solutions, Inc., Confidential Information. All rights reserved.



Screenshot – 2: After success message, the Import Status changes to 'Intelligent Import Initiated'.



- Refresh the page Brightleaf Import Status to 'Extraction Completed' and the Brightleaf action button changes to 'Brightleaf Import Review'. Refer to the screenshot below.



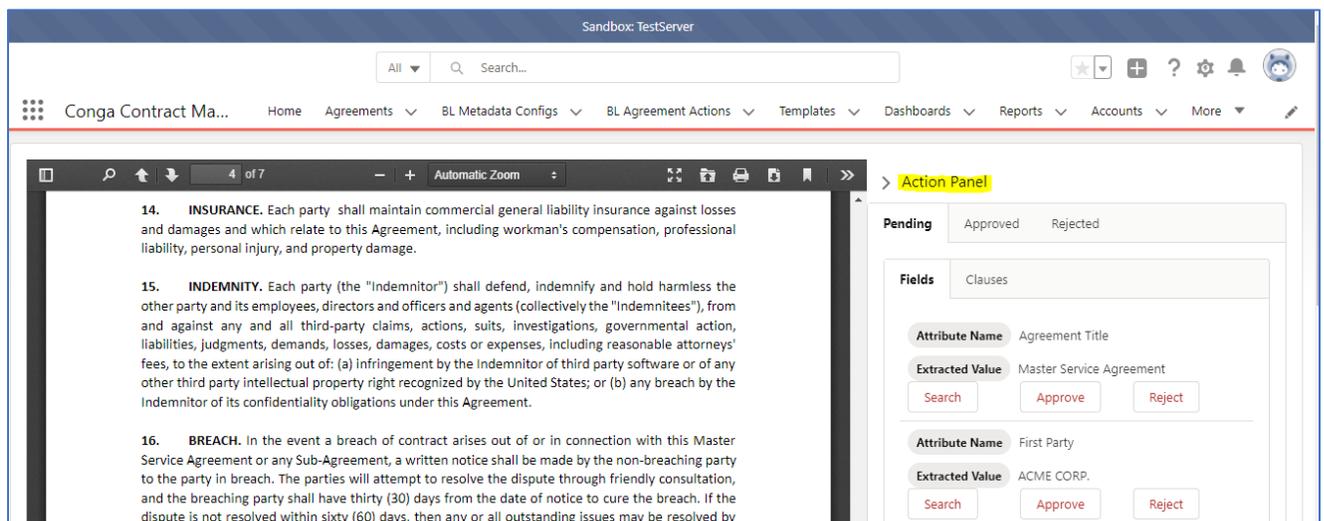
Verification of Extracted Results

- Once the TPP agreement is imported successfully, Brightleaf Import Status changes to 'Extraction Completed' and the Brightleaf action button changes to 'Brightleaf Import Review'. Click on 'Brightleaf Import Review'.

You will be directed to a page where on left side processed agreement is displayed and on the right-side list of extracted Attribute Names with its extracted values are shown. Refer to the screenshot below.

On the right side, there is an 'Action Panel' and 3 tabs:

- 'Action Panel' has some buttons used to perform different actions with respect to the agreement. Refer to the screenshot below.



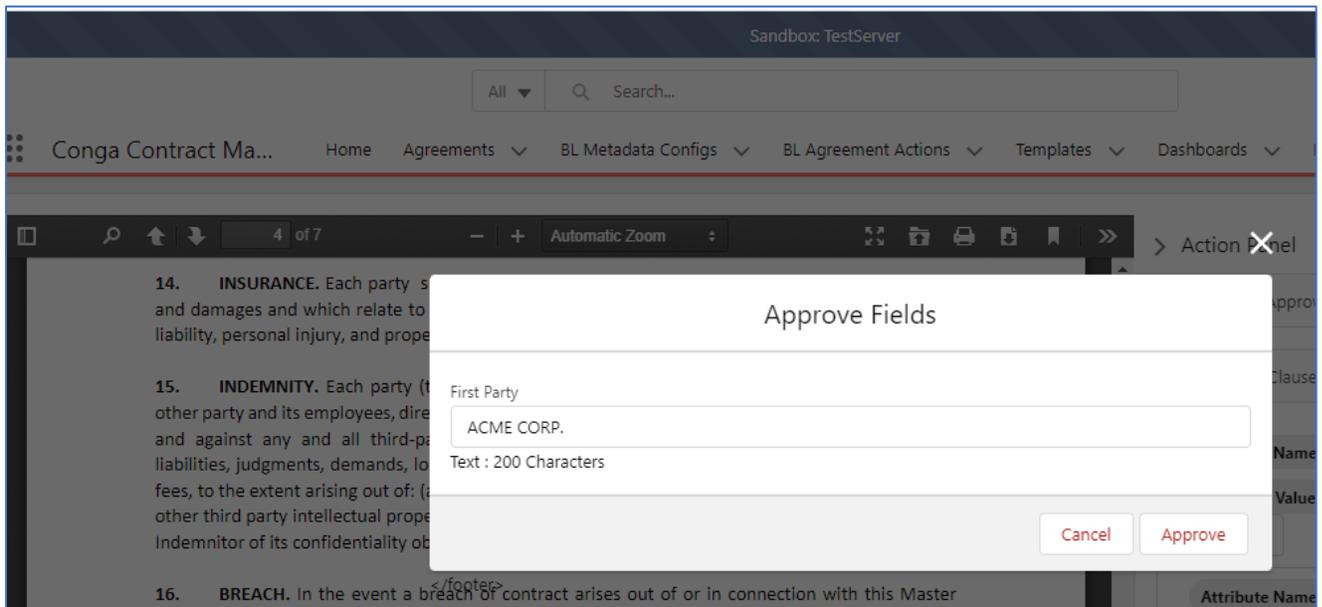
Copyright © 2021 Brightleaf Solutions, Inc., Confidential Information. All rights reserved.

2. There are 3 tabs and each tab has 2 sub tabs [Fields and Clauses] on the right side. All fields appear on the Fields tab and all clauses appears on Clauses tab.
 - a. Pending tab: By default, all fields/clauses will appear in this tab.
 - b. Approved tab: All the approved fields/clauses will appear in this tab.
 - c. Rejected tab: All the rejected fields/clauses will appear in this tab.

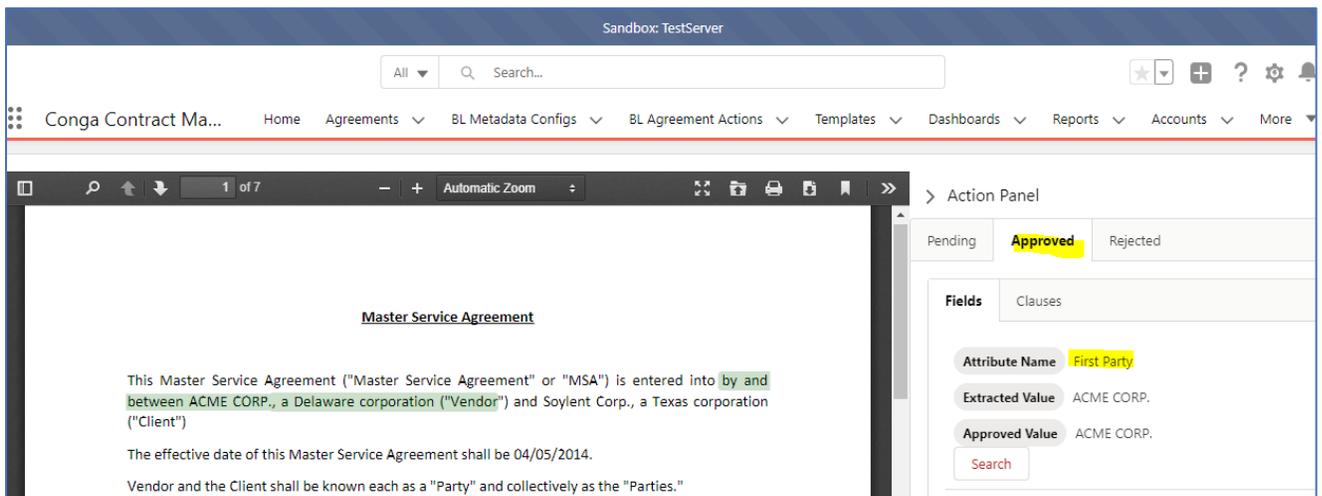
A. Change/Approve Attribute Name

Here, approve means a way of confirmation that the extracted metadata information for an Attribute is correct or not.

All the field type attributes appear in Field sub tab. To modify or approve an Attribute's extracted information click on 'Approve' button. Refer to the screenshot below.



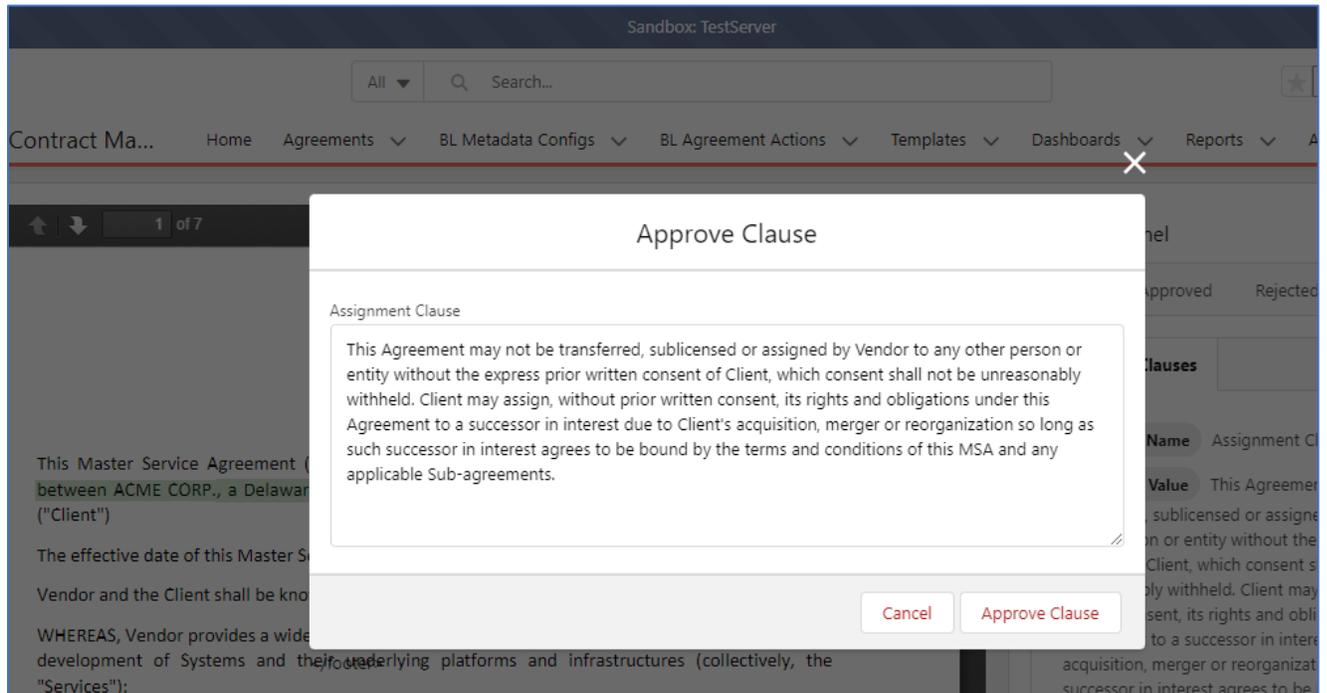
Once the attribute is approved, it is moved from Pending tab to Approve tab. Refer to the screenshot below.



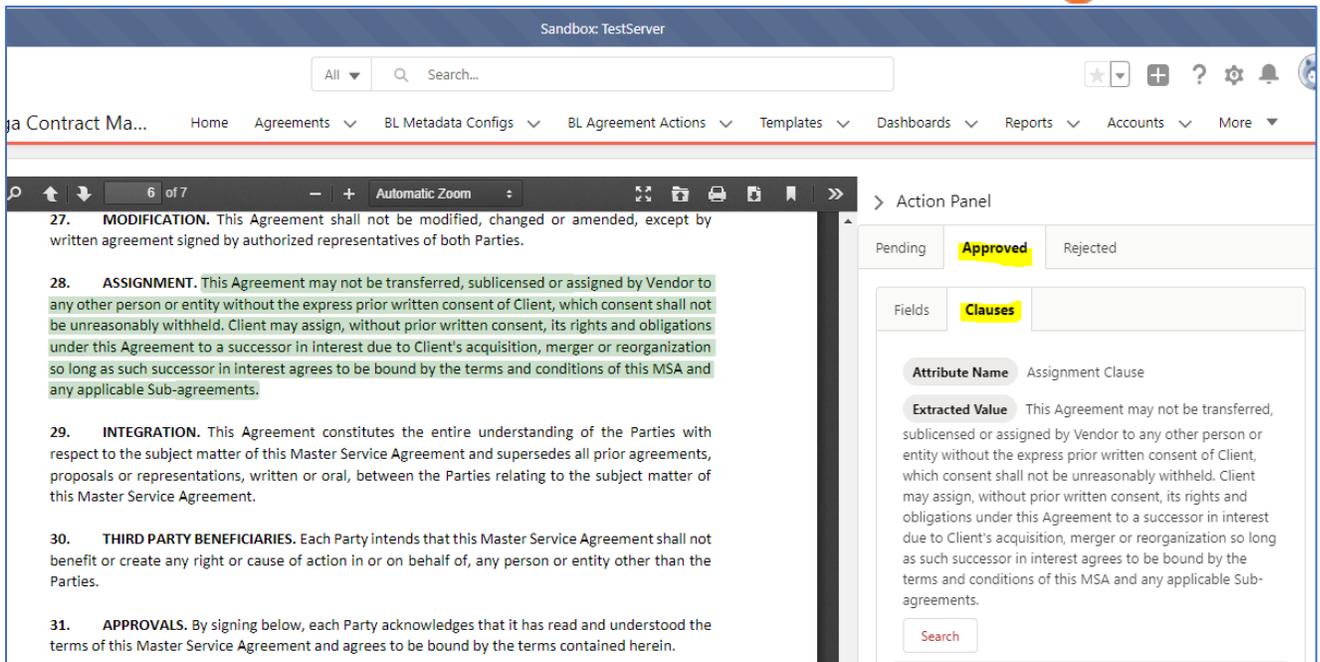
B. Change/Approve Clause

Here also, approve means a way of confirmation that the extracted clause for an Attribute is correct or not.

All the Clause type attributes appear in Clause sub tab. To modify or approve a Clause extracted information click on 'Approve' button. Refer to the screenshot below.



Once a clause is approved, it is moved from the Pending to the Approved tab. Refer to the screenshot below.



Sandbox: TestServer

All Search...

Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

6 of 7 Automatic Zoom

27. **MODIFICATION.** This Agreement shall not be modified, changed or amended, except by written agreement signed by authorized representatives of both Parties.

28. **ASSIGNMENT.** This Agreement may not be transferred, sublicensed or assigned by Vendor to any other person or entity without the express prior written consent of Client, which consent shall not be unreasonably withheld. Client may assign, without prior written consent, its rights and obligations under this Agreement to a successor in interest due to Client's acquisition, merger or reorganization so long as such successor in interest agrees to be bound by the terms and conditions of this MSA and any applicable Sub-agreements.

29. **INTEGRATION.** This Agreement constitutes the entire understanding of the Parties with respect to the subject matter of this Master Service Agreement and supersedes all prior agreements, proposals or representations, written or oral, between the Parties relating to the subject matter of this Master Service Agreement.

30. **THIRD PARTY BENEFICIARIES.** Each Party intends that this Master Service Agreement shall not benefit or create any right or cause of action in or on behalf of, any person or entity other than the Parties.

31. **APPROVALS.** By signing below, each Party acknowledges that it has read and understood the terms of this Master Service Agreement and agrees to be bound by the terms contained herein.

Action Panel

Pending **Approved** Rejected

Fields **Clauses**

Attribute Name Assignment Clause

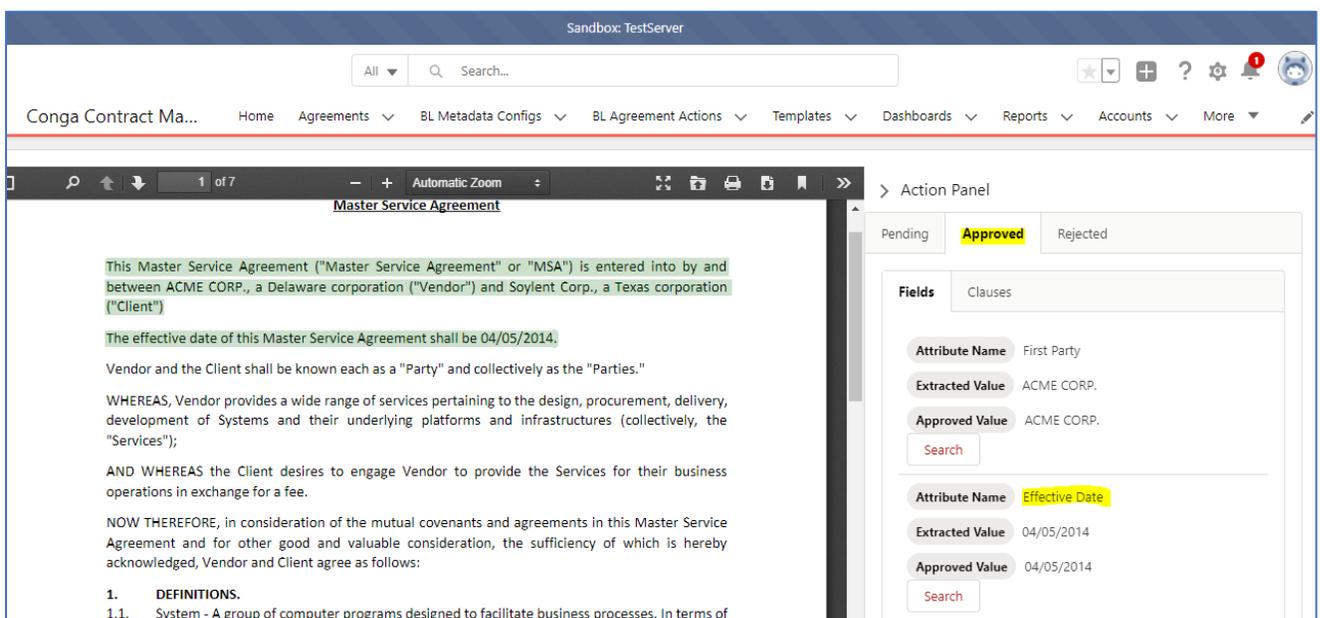
Extracted Value This Agreement may not be transferred, sublicensed or assigned by Vendor to any other person or entity without the express prior written consent of Client, which consent shall not be unreasonably withheld. Client may assign, without prior written consent, its rights and obligations under this Agreement to a successor in interest due to Client's acquisition, merger or reorganization so long as such successor in interest agrees to be bound by the terms and conditions of this MSA and any applicable Sub-agreements.

Search

C. Updating Attribute Name data in Field/Clause

Once any attribute is approved, the attribute value with which field it is mapped on the Agreement Details page, is displayed. For example, Attribute Name is 'Effective Date' and is approved. On approve, the attribute will move from the Pending to the Approved tab. Click on 'Back to Agreement' from the 'Action Panel' which appears just above the Pending, Approved and Rejected Tabs. The extracted attribute value is updated on Field 'Agreement Start Date' on Agreement page.

Screen 1 – Effective Date on Approved Tab



Sandbox: TestServer

All Search...

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1 of 7 Automatic Zoom

Master Service Agreement

This Master Service Agreement ("Master Service Agreement" or "MSA") is entered into by and between ACME CORP., a Delaware corporation ("Vendor") and Soylent Corp., a Texas corporation ("Client")

The effective date of this Master Service Agreement shall be 04/05/2014.

Vendor and the Client shall be known each as a "Party" and collectively as the "Parties."

WHEREAS, Vendor provides a wide range of services pertaining to the design, procurement, delivery, development of Systems and their underlying platforms and infrastructures (collectively, the "Services");

AND WHEREAS the Client desires to engage Vendor to provide the Services for their business operations in exchange for a fee.

NOW THEREFORE, in consideration of the mutual covenants and agreements in this Master Service Agreement and for other good and valuable consideration, the sufficiency of which is hereby acknowledged, Vendor and Client agree as follows:

1. **DEFINITIONS.**

1.1. System - A group of computer programs designed to facilitate business processes. In terms of

Action Panel

Pending **Approved** Rejected

Fields Clauses

Attribute Name First Party

Extracted Value ACME CORP.

Approved Value ACME CORP.

Search

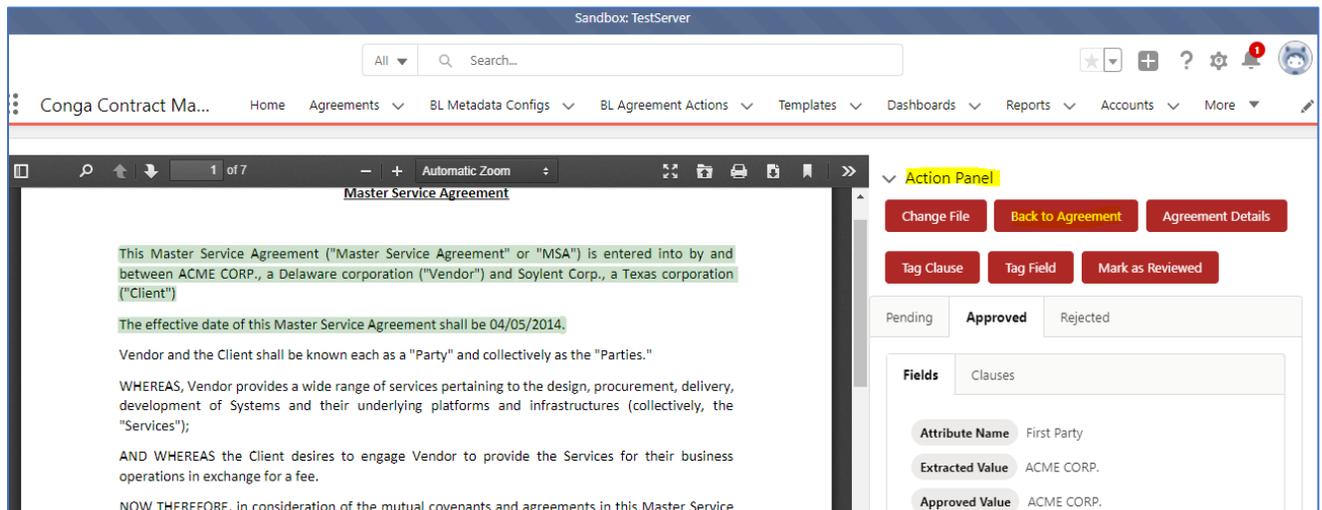
Attribute Name **Effective Date**

Extracted Value 04/05/2014

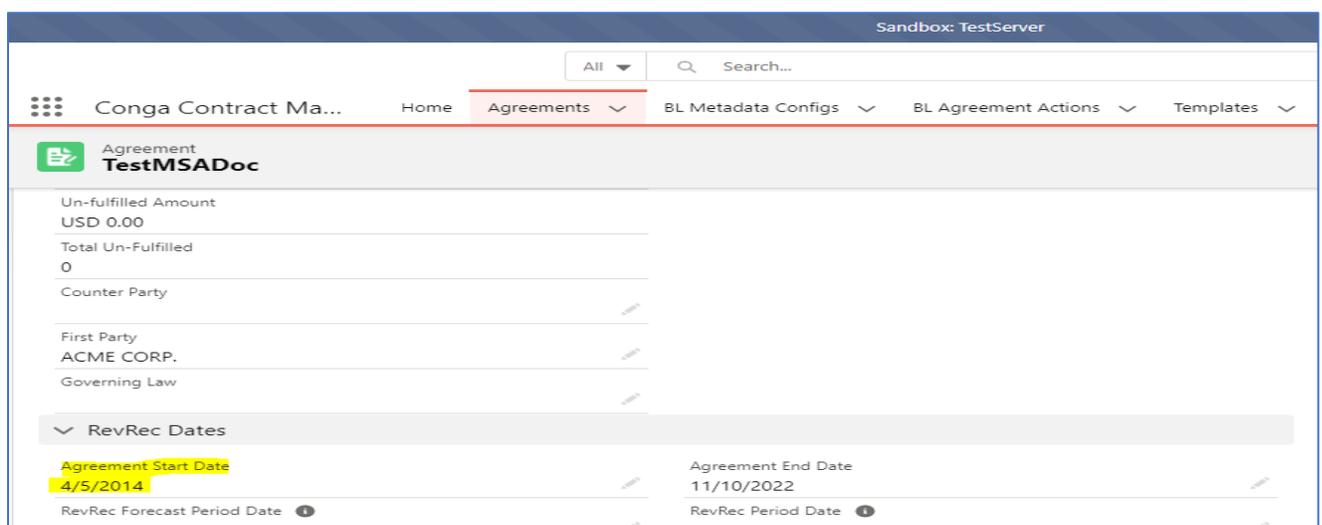
Approved Value 04/05/2014

Search

Screen 2 – ‘Action Panel’ where ‘Back to Agreement’ button appears



Screen 3 – Click on ‘Back to Agreement’ button to move Agreement page and below screenshot shows the updated date in ‘Effective Date’.

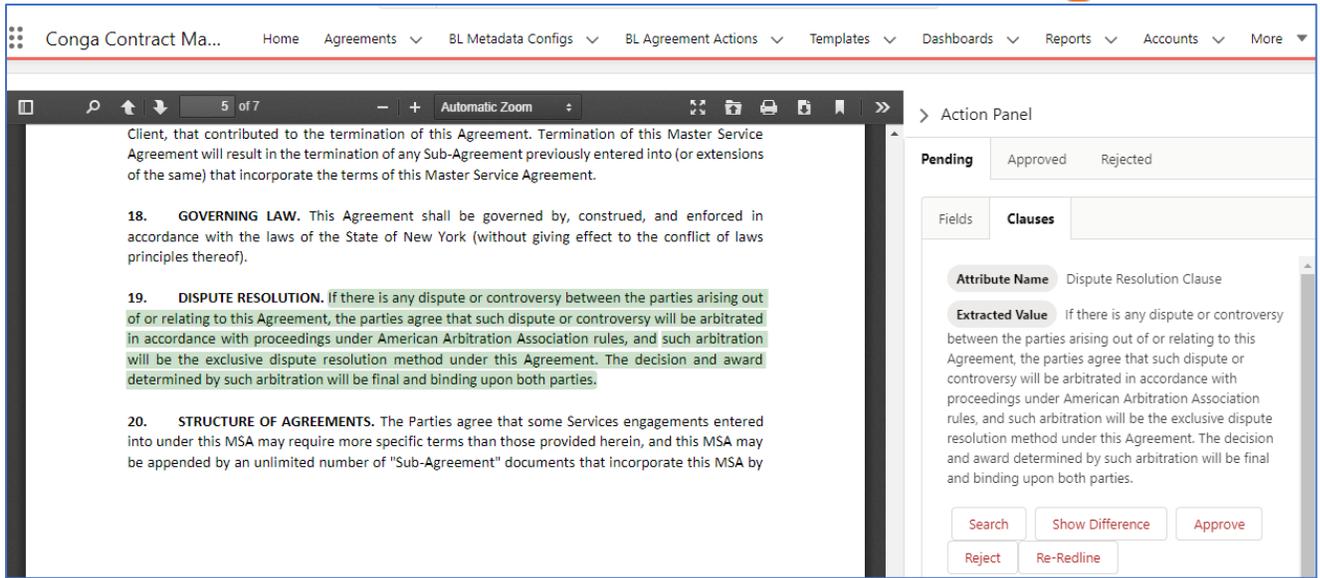


D. Re-Redlining of Clause

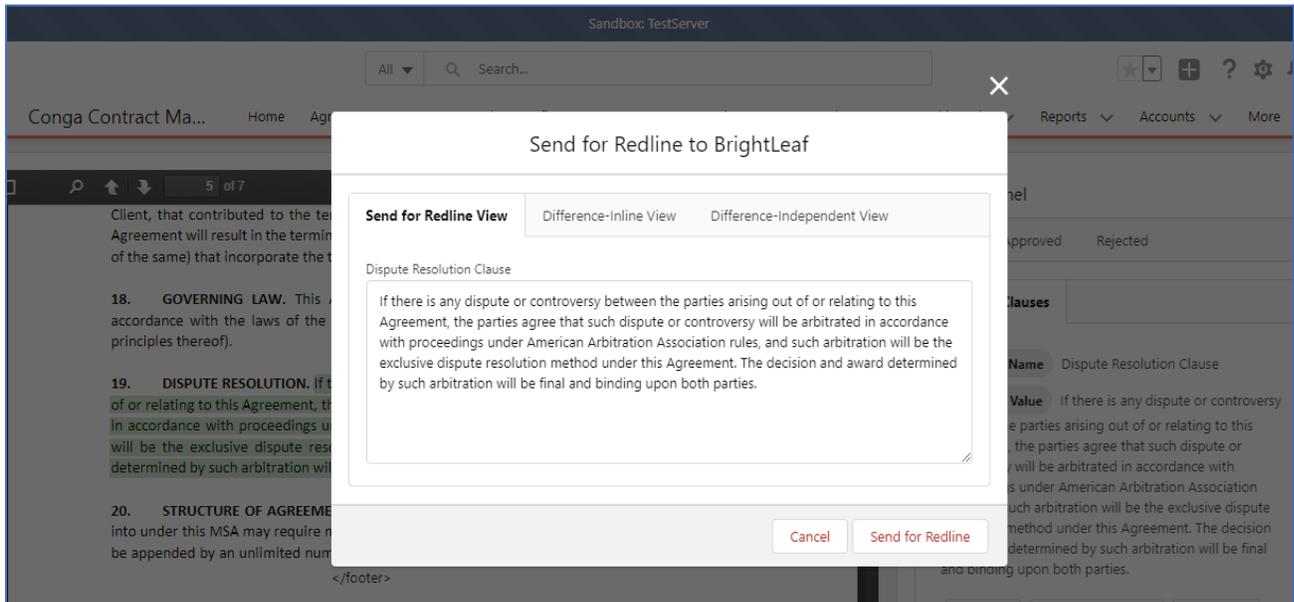
Re-Redlining of Clause helps user to correct the clause text if the system did not extract properly. This feature takes the modified text input by user and updates the clause with flag (Redlined). Refer to the screenshot below. Following are the steps:

1. Click on the ‘Re-Redline’ button for any clause. (Refer Screen 1 below)
2. One popup will appear asking user to modify the text and click on ‘Send for Redline’. (Refer Screen 2 below)
3. The clause shown in step 1 gets updated with the modified text. (Refer Screen 3 below)

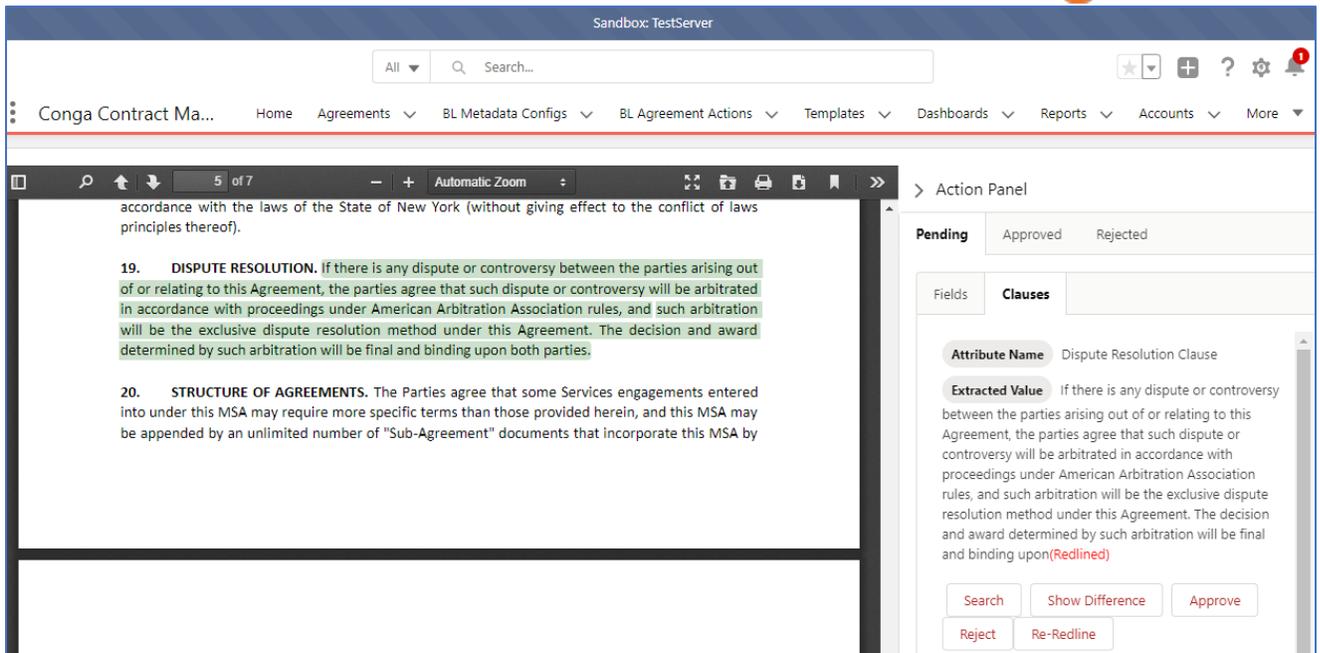
Screen 1 – Before Re-Redline



Screen 2 – Redline Popup to modify text



Screen 3 – Updated clause with Redlined flag

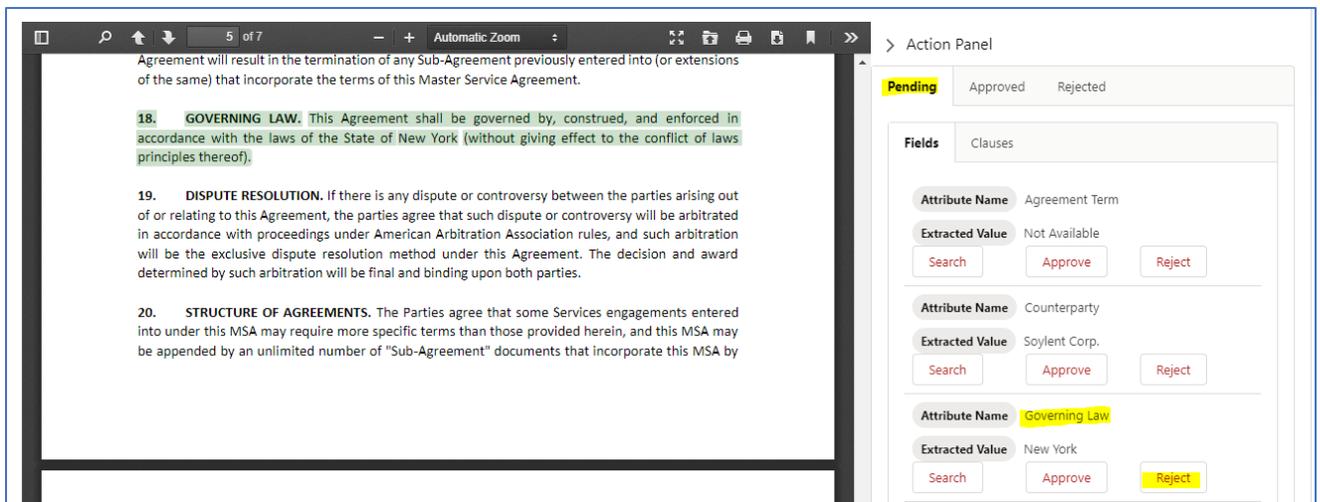


E. Reject Attribute Name

If any time, user feels that any attribute at moment of time is not required, then user has the flexibility to reject the attribute which is of 'Field' type during the verification process. All the Attribute Names with Field type appears in Fields tab.

To reject any attribute, user has to click on 'Reject' button showing for an attribute. Any rejected attribute is moved from the Pending tab to Rejected tab. Refer to below screenshots.

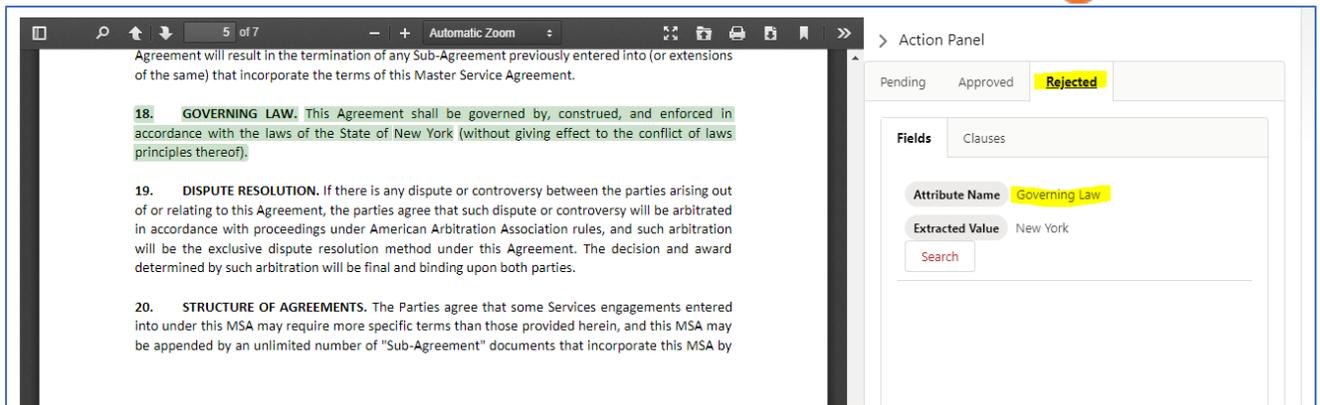
Screen 1 – Attribute 'Governing Law' in Pending tab



Click on Reject button

Screen 2 – Attribute 'Governing Law' moved to the Rejected tab

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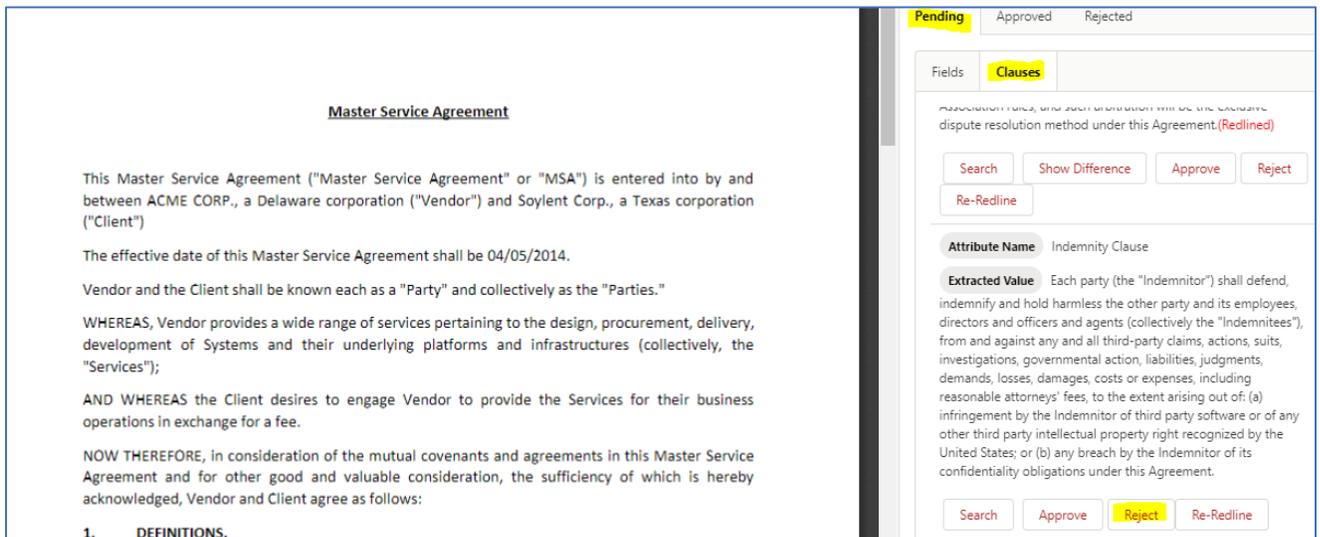


F. Reject Clause

If any time, user feels that any clause at moment of time is not required, then user has the flexibility to reject the attribute which is of 'Clause' type during the verification process. All the Attribute Names with Clause type appears in Clauses tab.

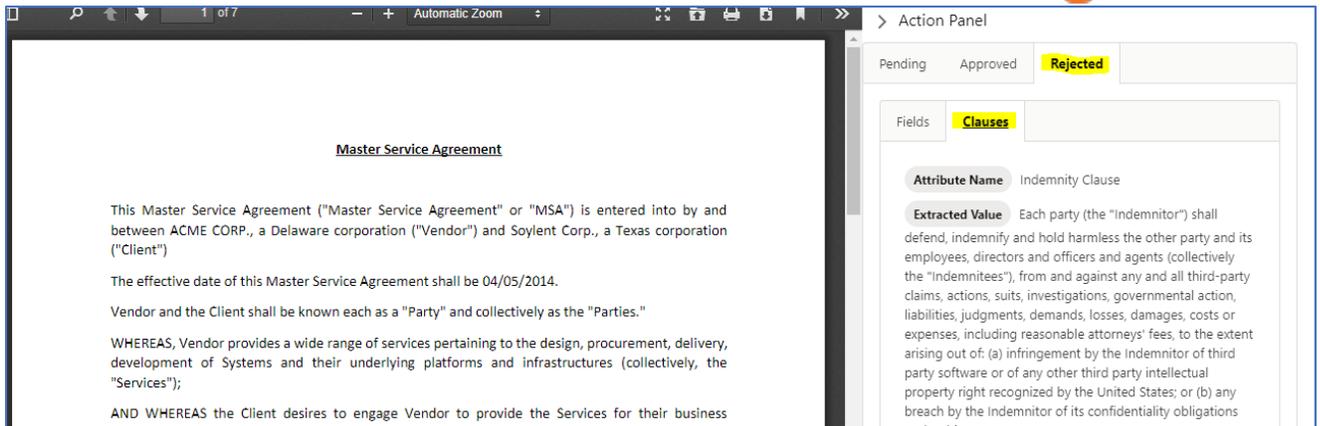
To reject any clause, user has to click on 'Reject' button showing for a clause. Any rejected clause is moved from the Pending tab to Rejected tab. Refer to below screenshots.

Screen 1 – Attribute 'Indemnity Clause' in Pending tab



Click on Reject button

Screen 2 – Attribute 'Indemnity Clause' moved to the Rejected tab



Search/View Agreement Data

Search/View button provided against each attribute will help to locate the extracted information in the agreement through highlighting the text in the agreement displayed in the left pane.

Following sections explains different ways to search:

A. Search extracted data

B. Search text from Agreement

A. Search extracted data

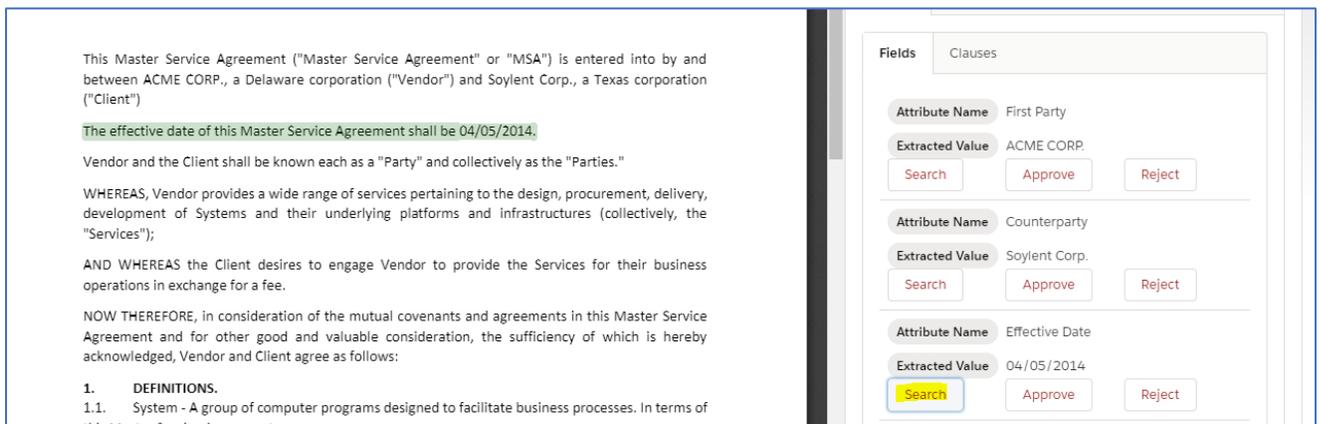
All the attributes (fields or clauses) wherever present, whether in Pending/Approved/Rejected, have search button to view the extracted results in the agreement.

Refer to the screenshot below. It shows the example for the attribute Effective Date.

1. Go to the attribute Effective Date

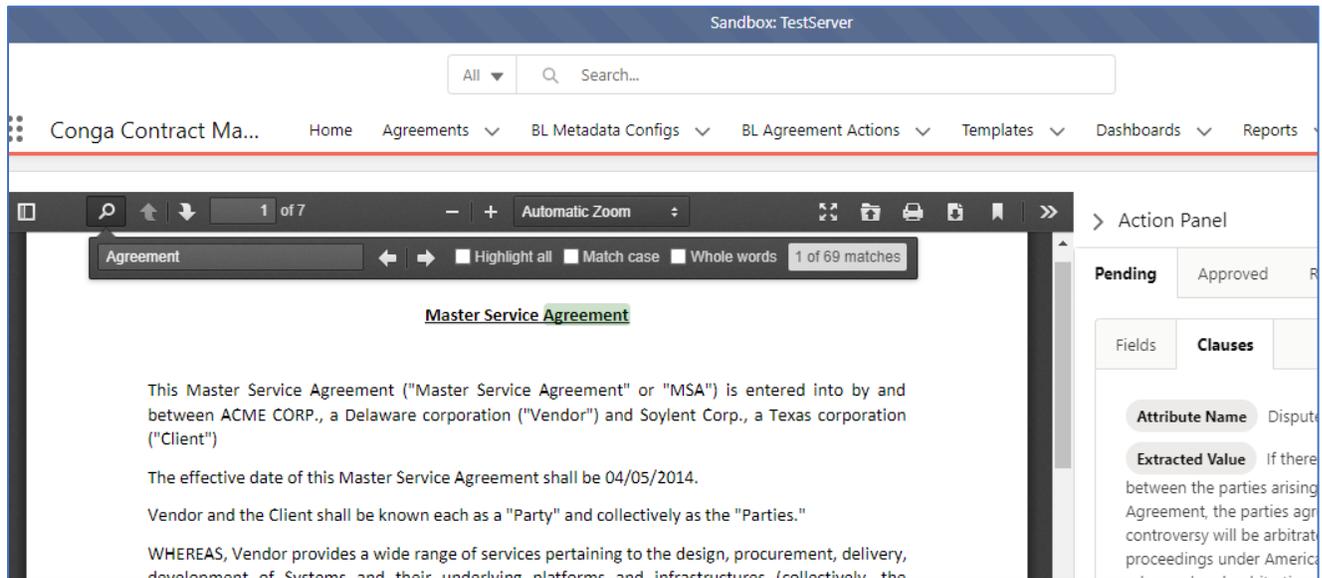
2. Click on Search button

It highlights the portion of text in the agreement based which the Effective Date attribute value is extracted.



B. Search anything in agreement

User has the flexibility to search anything within the agreement using the search provided for the PDF Viewer. Refer to the screenshot below.



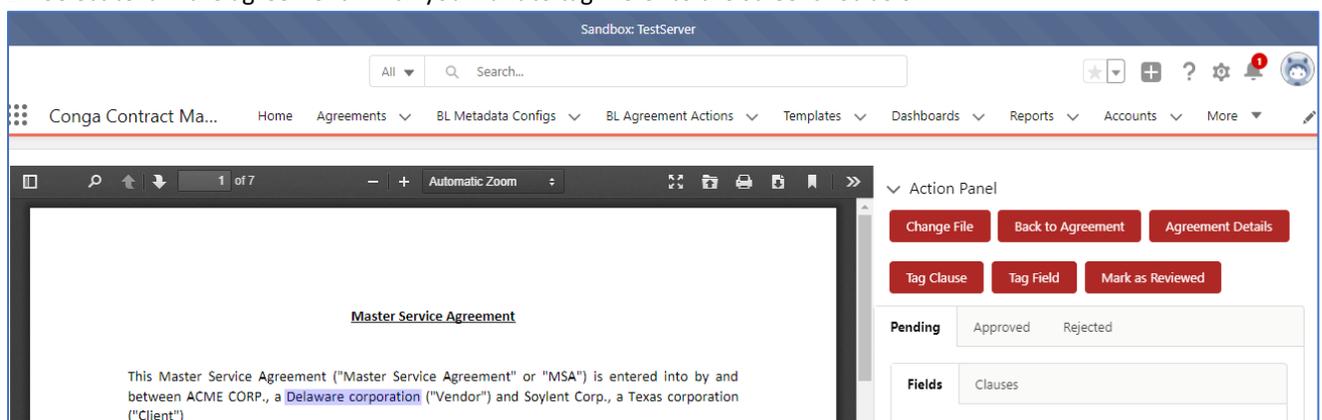
Tag Clause/Field

A tag means a term assigned to a piece of information. This kind of metadata helps describe an item and allows it to be found again by browsing or searching. There are two buttons provided on the 'Action Panel' for tagging any item i.e., Field or Clause.

A. Tag a field

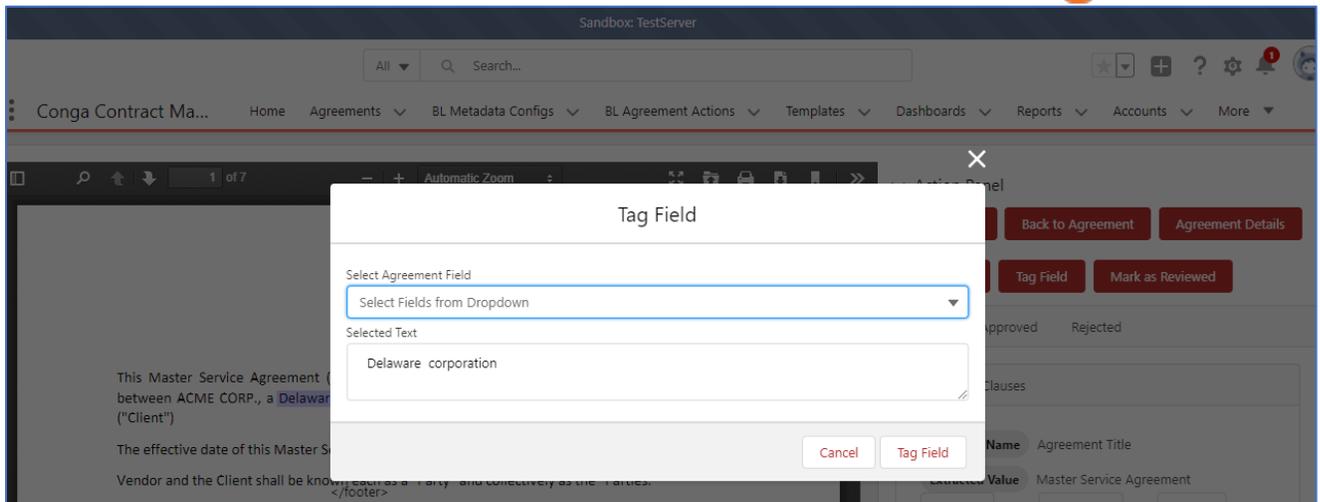
Using 'Tag Field' button, user can tag a piece of information from the agreement. Following are the steps to tag a field

1. Select text in the agreement which you want to tag. Refer to the screenshot below.



2. Go to Action Panel
3. Click on Tag Field button.
4. Select a Field Name from the list of fields available in the drop down. Refer to the screenshot below.

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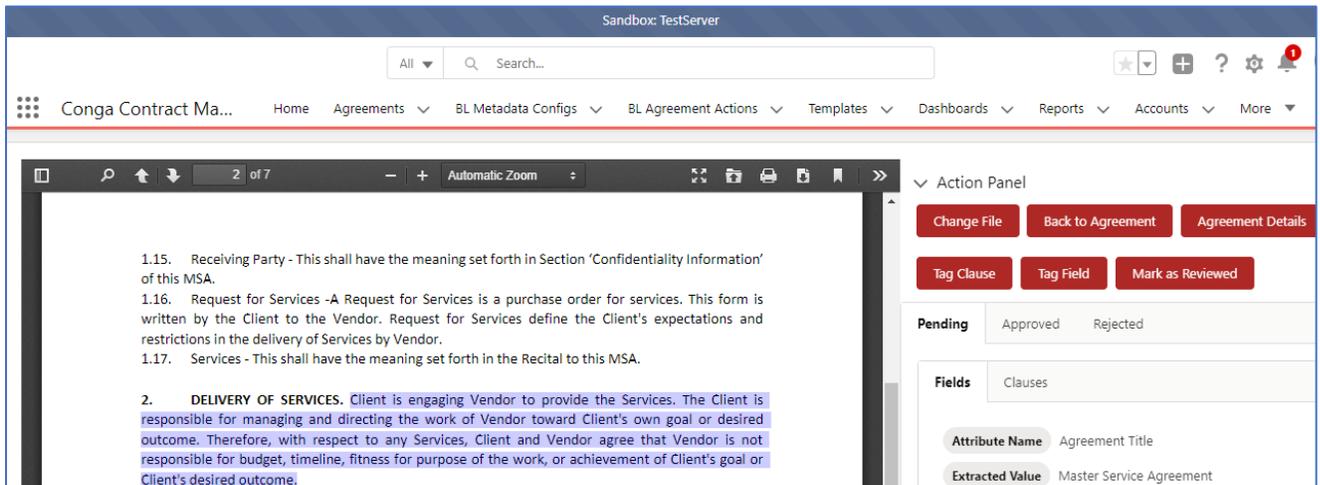


5. Click on Tag Field button.

B. Tag a clause

Using 'Tag Clause' button, user can tag a clause from the agreement. Following are the steps to tag a clause

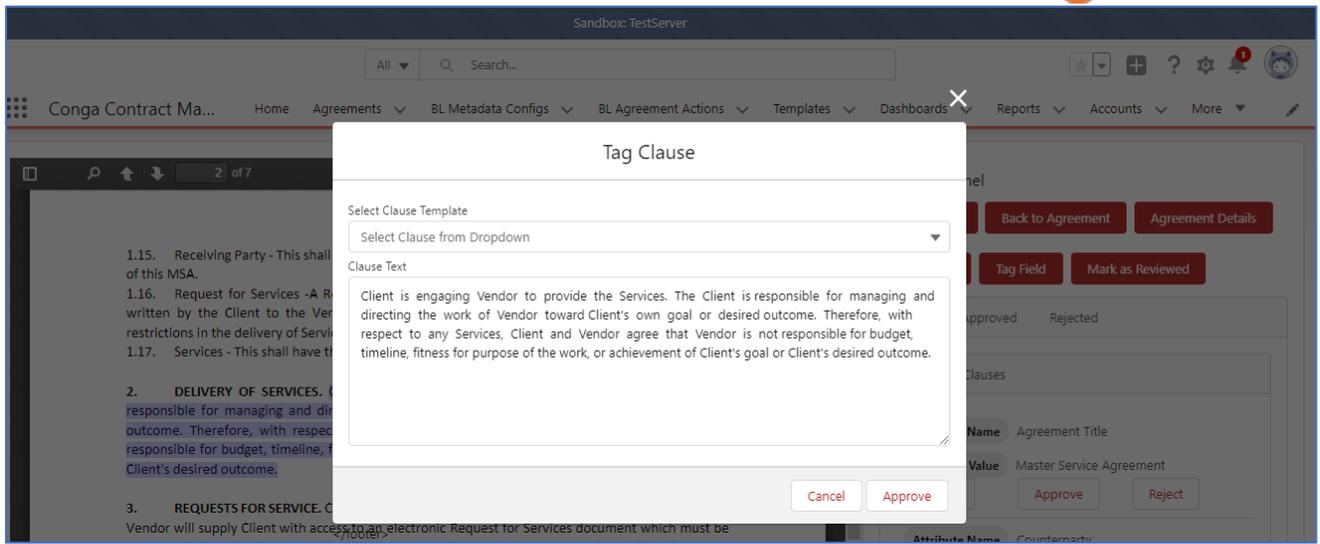
1. Select text in the agreement which you want to tag. Refer to the screenshot below.



2. Go to Action Panel

3. Click on Tag Clause button.

4. Select a Clause Name from the list of clauses available in the drop down. Refer to the screenshot below.



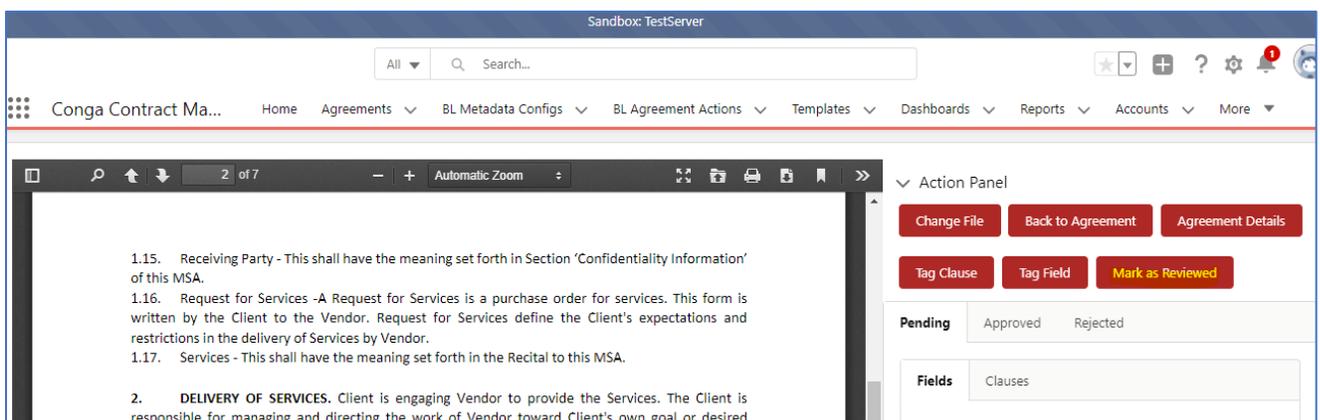
5. Click on Tag Clause button.

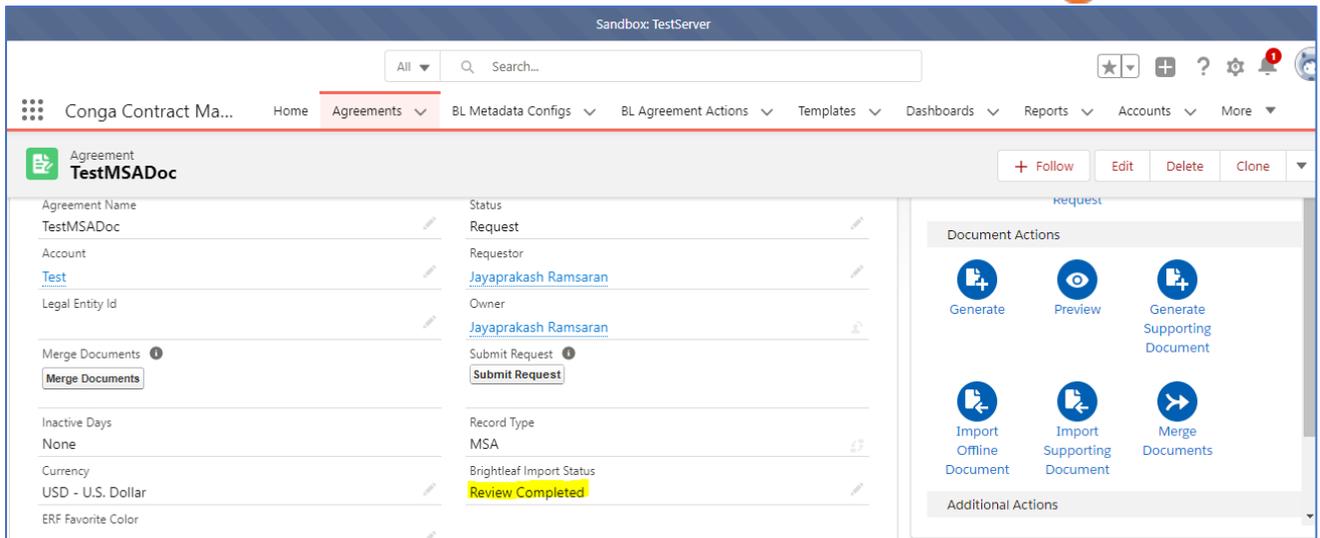
C. Review

On the attributes values for any field or clause is verified, the agreement can be marked as 'Mark as Reviewed' to move to the next stage of Contract Management. Refer to the screenshot below.

Following are the steps to a mark an agreement as reviewed

1. Go to the Action Panel
2. Click on Mark as Reviewed button
3. Click on 'Back to Agreement' button
4. The Brightleaf Import status change to 'Review Completed'. Refer to the screenshot below.





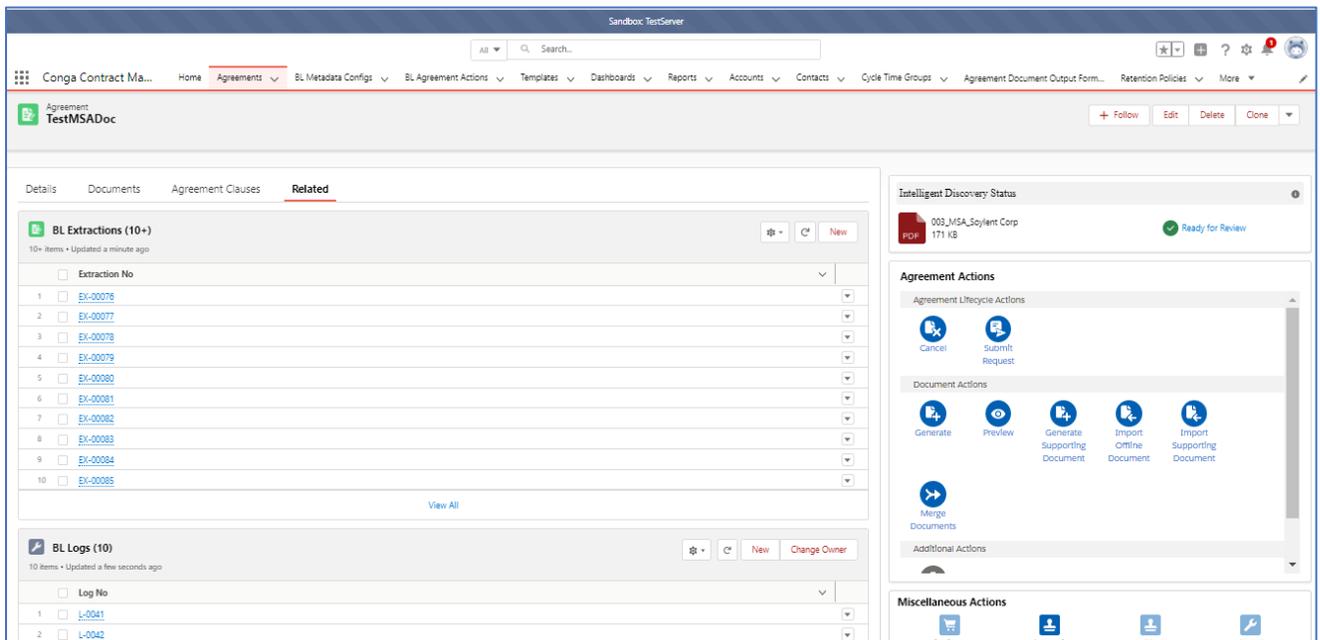
View Logs/Files/Related details

A. Related Tab [BL Extractions] – View all attributes results

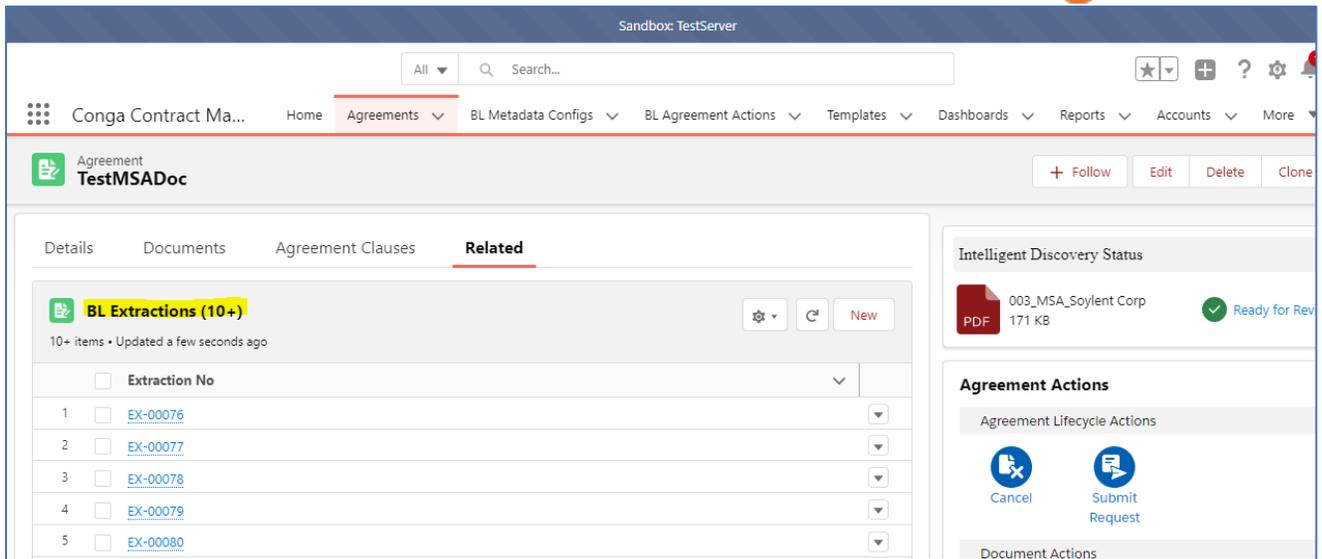
There are two related list (BL Extractions, BL Logs) in the Related Tab in the Agreement Details page. This shows all the attributes along with its extracted results as complete list at once.

Following are the steps:

1. Go to Related tab. Refer to the screenshot below.



2. Under the BL Extractions header, it shows all the list of attributes along with its extracted information



Sandbox: TestServer

All Search...

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Agreement TestMSADoc + Follow Edit Delete Clone

Details Documents Agreement Clauses **Related**

BL Extractions (10+) 10+ items • Updated a few seconds ago

	<input type="checkbox"/> Extraction No	
1	<input type="checkbox"/> EX-00076	▼
2	<input type="checkbox"/> EX-00077	▼
3	<input type="checkbox"/> EX-00078	▼
4	<input type="checkbox"/> EX-00079	▼
5	<input type="checkbox"/> EX-00080	▼

Intelligent Discovery Status

PDF 003_MSA_Soylent Corp 171 KB ✓ Ready for Rev

Agreement Actions

Agreement Lifecycle Actions

Cancel Submit Request

Document Actions

3. Click on any attribute with label 'Extraction No.' to view its details.

B. Related Tab [BL Extractions] – View all extracted clauses

There are two related list (BL Extractions, BL Logs) in the Related Tab in the Agreement Details page. BL Extractions shows all the attributes (both fields and clauses) along with its extracted results as complete list at once.

BL Extractions Tab page shows all the clauses along with its redlining status at one place.

Following are the steps:

1. Go to Related tab-> Go to BL Extractions. Click on View All. Refer to the screenshot below.

Sandbox TestServer

All Search...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts Contacts Cycle

Agreement TestMSADoc

Details Documents Agreement Clauses **Related**

BL Extractions (10+) 10+ items • Updated 2 minutes ago ✱ 🔄 New

<input type="checkbox"/>	Extraction No	
1	EX-00076	▼
2	EX-00077	▼
3	EX-00078	▼
4	EX-00079	▼
5	EX-00080	▼
6	EX-00081	▼
7	EX-00082	▼
8	EX-00083	▼
9	EX-00084	▼
10	EX-00085	▼

[View All](#)

C. View log details

User can view logs any time.

Go to the Agreement Detail page. Go to the Related Tab and under the BL Logs, it will show the log details. Refer to the screenshot below.

Sandbox: TestServer

All Search...

Conga Contract Ma... Home Agreements BL Metadata Configs BL Agreement Actions Templates Dashboards Reports Accounts More

Agreement TestMSADoc + Follow Edit Delete Clone

BL Logs (10) 10 items • Updated 2 minutes ago New Change Owner

Log No	
1	L-0041
2	L-0042
3	L-0043
4	L-0044
5	L-0045
6	L-0046
7	L-0047
8	L-0048
9	L-0049
10	L-0050

View All

Document Document

Additional Actions

Miscellaneous Actions

- Configure Products
- Approvals
- My Approvals
- Amend Clauses
- Load Obligations

Activity Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View

D. View Files

View Files under the Related Tab gives you the details of the documents being uploaded as part of that agreement.

Following are the steps:

1. Click on 'Documents' tab on Agreement Details page.
2. Under the header 'Notes & Attachments', it shows the details of the documents attached to uploaded/imported agreement.

Sandbox: TestServer

All ▾ Search...

Conga Contract Ma... Home Agreements ▾ BL Metadata Configs ▾ BL Agreement Actions ▾ Templates ▾

Agreement
TestMSADoc

Details **Documents** Agreement Clauses Related

 **Agreement Documents**

 **Notes & Attachments (2)** Upload Files

 003_MSA_Soylent Corp_BLProcessed Nov 11, 2021 • 167KB • pdf	 003_MSA_Soylent Corp Nov 11, 2021 • 167KB • pdf
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[View All](#)

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