



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

Brightleaf TPP Package for Salesforce - Configuration/Map ping Guide

Brightleaf Solutions, Inc.
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Brightleaf TPP Package Configuration/Mapping Guide
For Conga/SF (CFS/C1)
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

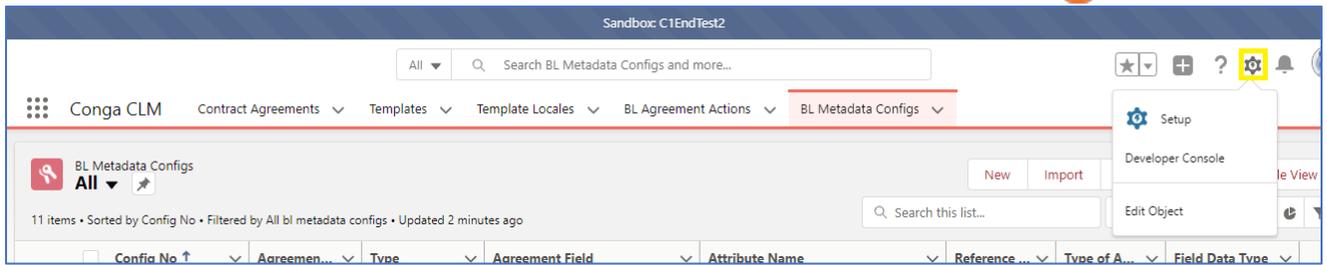
Example:

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

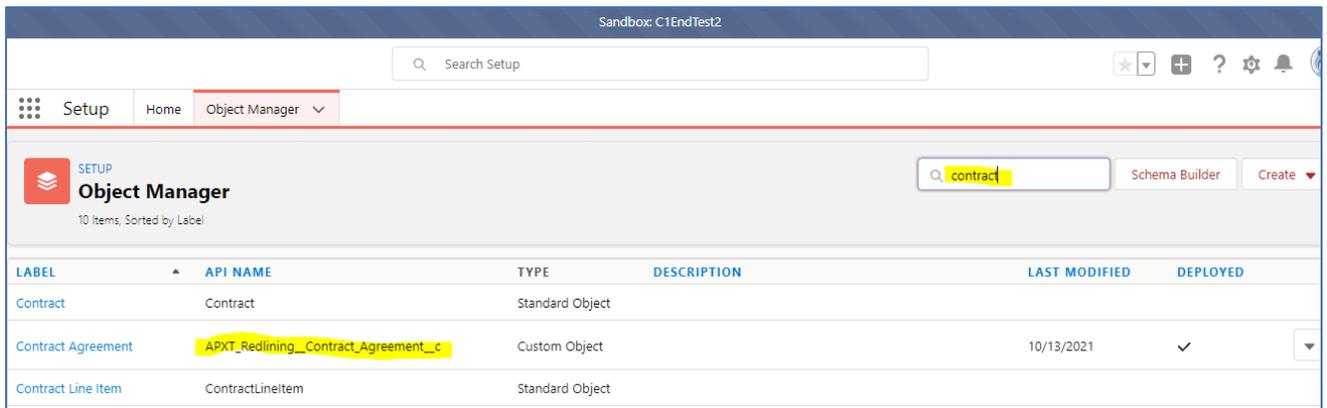


To create and configure record type, go to the top right of the page.

- 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.

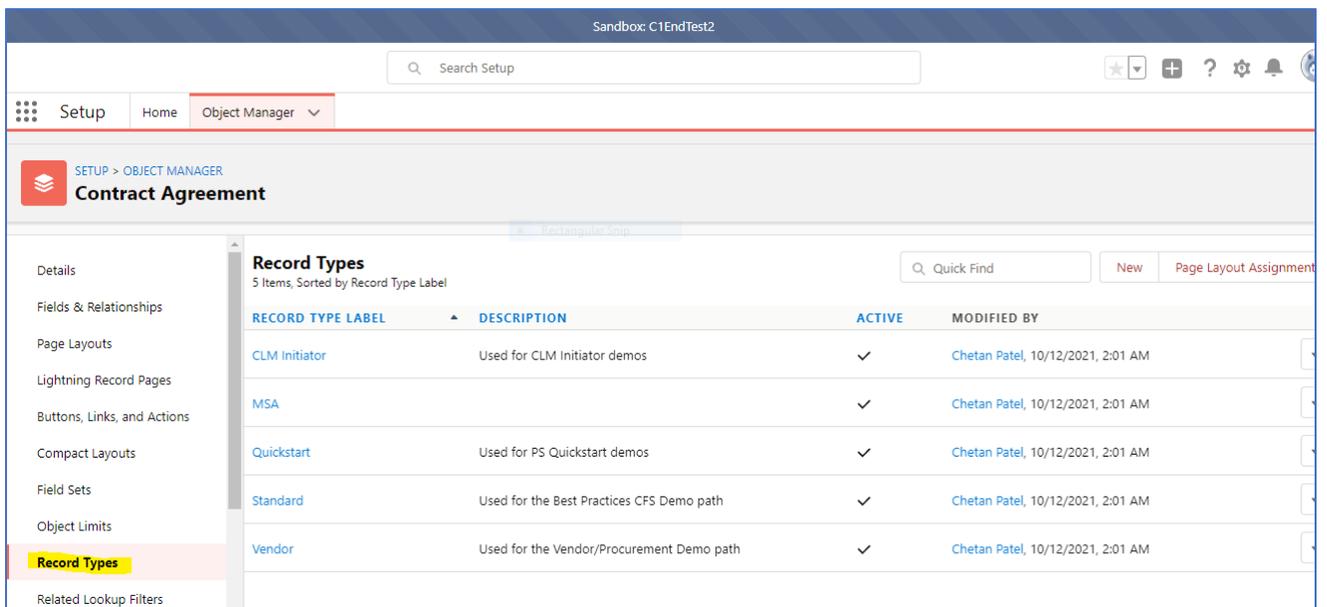


2. There will be two tabs: “Home” and “Object Manager”. Click on the Object Manager tab. Type ‘Contract Agreement’ in search box. Refer to the screenshot below.

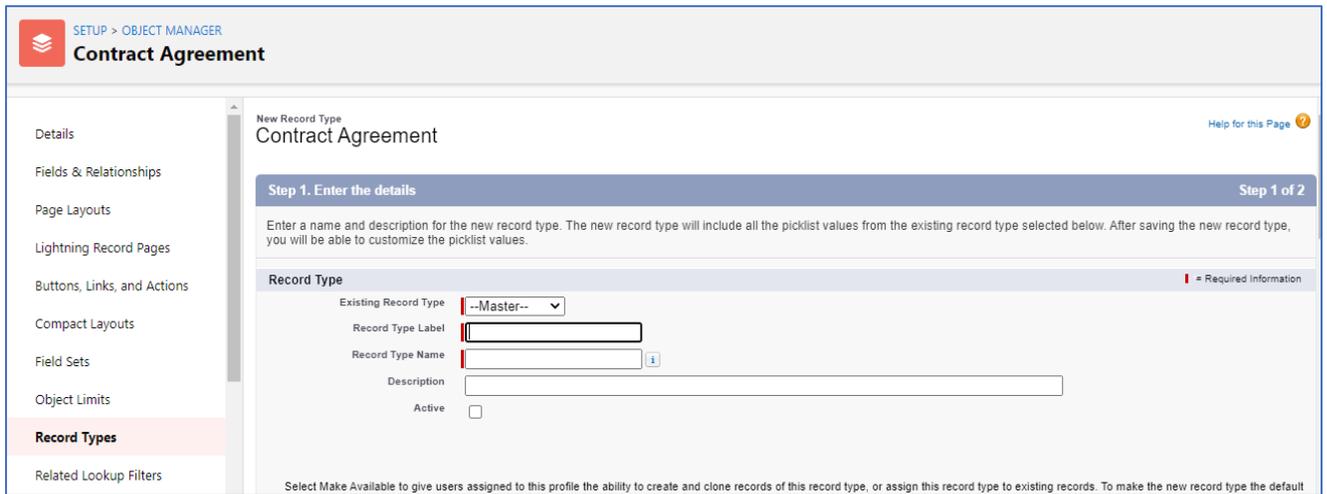


3. Click on Contract Agreement whose API_Name begins with ‘APXT’.

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 the screenshot below. Select to whom the newly created record type will be available to. For example, it can be made available to the 'System administrator'. Refer to the screenshot below.



The screenshot shows the 'New Record Type' form for 'Contract Agreement'. The form is titled 'Step 1. Enter the details' and 'Step 1 of 2'. It includes a sidebar with navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main form area contains the following fields:

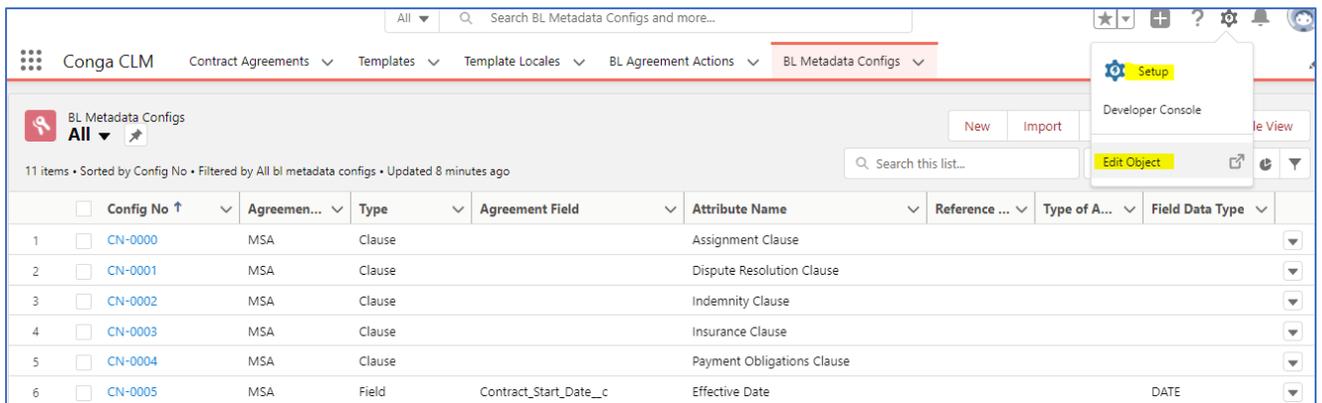
- Existing Record Type: --Master-- (dropdown)
- Record Type Label: [Text Input]
- Record Type Name: [Text Input]
- Description: [Text Input]
- Active:

At the bottom, there is a note: "Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default".

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:

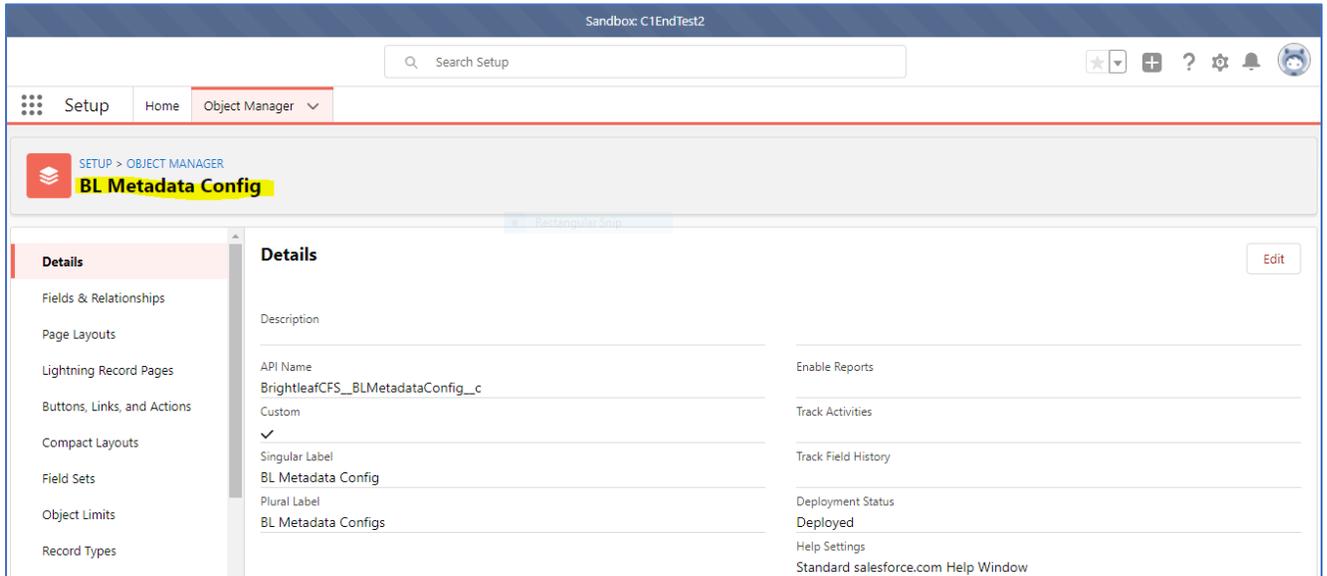
1. Navigate to the BL Metadata Config tab. It will display the list of existing fields. Stay on this page and click on the Gear Icon on the top right side. A small menu will appear and from that menu, click on Edit Object. Refer to the screenshot below.



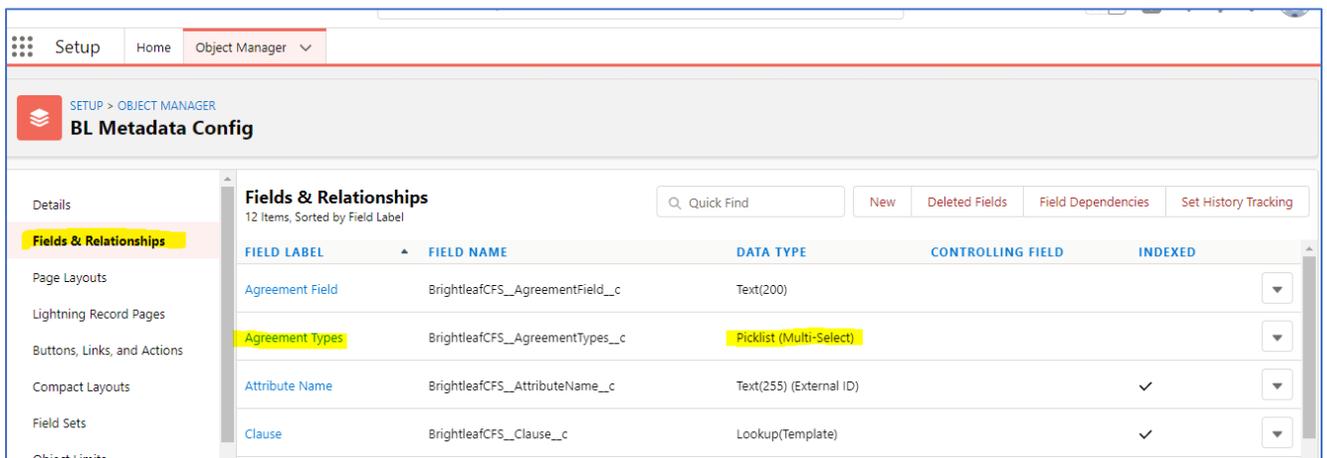
The screenshot shows the 'BL Metadata Configs' table in the 'Conga CLM' system. The table has 11 items and is sorted by 'Config No'. A context menu is open over the 'Edit Object' option. The table data is as follows:

Config No	Agreemen...	Type	Agreement Field	Attribute Name	Reference ...	Type of A...	Field Data Type
1	CN-0000	MSA	Clause	Assignment Clause			
2	CN-0001	MSA	Clause	Dispute Resolution Clause			
3	CN-0002	MSA	Clause	Indemnity Clause			
4	CN-0003	MSA	Clause	Insurance Clause			
5	CN-0004	MSA	Clause	Payment Obligations Clause			
6	CN-0005	MSA	Field	Contract_Start_Date_c	Effective Date		DATE

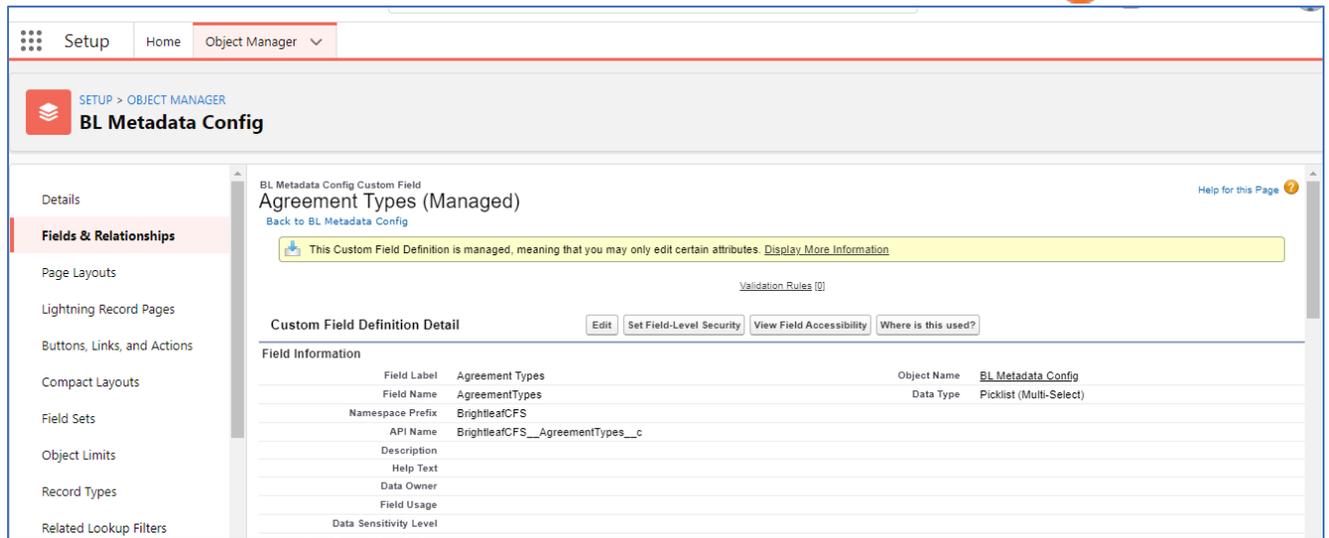
2. On top, the Object Manager tab, should display BL Metadata Config as its sub-heading. Refer to the screenshot below.



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.



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.



BL Metadata Config Custom Field
Agreement Types (Managed)
[Back to BL Metadata Config](#)

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

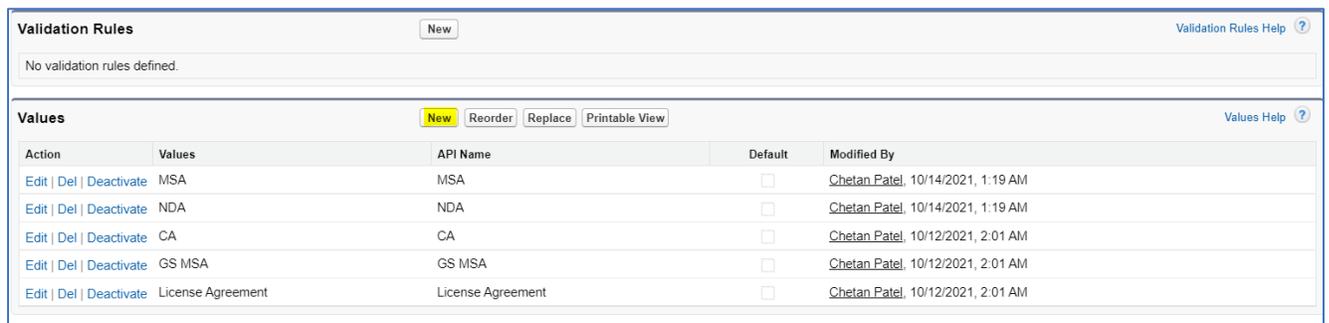
Validation Rules (0)

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

Field Information

Field Label	Agreement Types	Object Name	BL_Metadata_Config
Field Name	AgreementTypes	Data Type	Picklist (Multi-Select)
Namespace Prefix	BrightleafCFS		
API Name	BrightleafCFS__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	MSA	MSA	<input type="checkbox"/>	Chetan_Patel , 10/14/2021, 1:19 AM
Edit Del Deactivate	NDA	NDA	<input type="checkbox"/>	Chetan_Patel , 10/14/2021, 1:19 AM
Edit Del Deactivate	CA	CA	<input type="checkbox"/>	Chetan_Patel , 10/12/2021, 2:01 AM
Edit Del Deactivate	GS MSA	GS MSA	<input type="checkbox"/>	Chetan_Patel , 10/12/2021, 2:01 AM
Edit Del Deactivate	License Agreement	License Agreement	<input type="checkbox"/>	Chetan_Patel , 10/12/2021, 2:01 AM

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

Add Picklist Values
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.

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.

Agreements ▾ Templates ▾ Template Locales ▾ BL Agreement Actions ▾ BL Metadata Confios ▾

New Contract Agreement

Select a record type

- Standard
Used for the Best Practices CFS Demo path
- CLM Initiator
Used for CLM Initiator demos
- MSA
- Quickstart
Used for PS Quickstart demos
- Vendor
Used for the Vendor/Procurement Demo path

B. Creation of Attribute Name

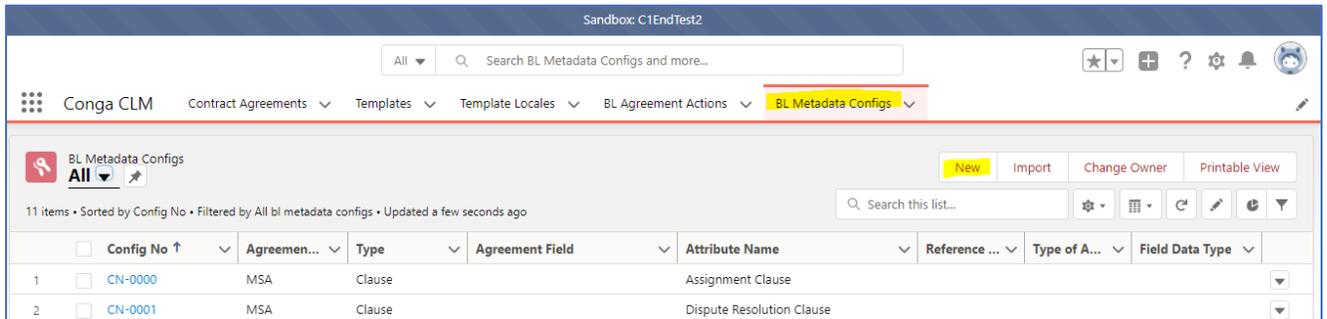
The Attribute Name is the attribute which refers to the meta data field/clause created on CLM Platform application.

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

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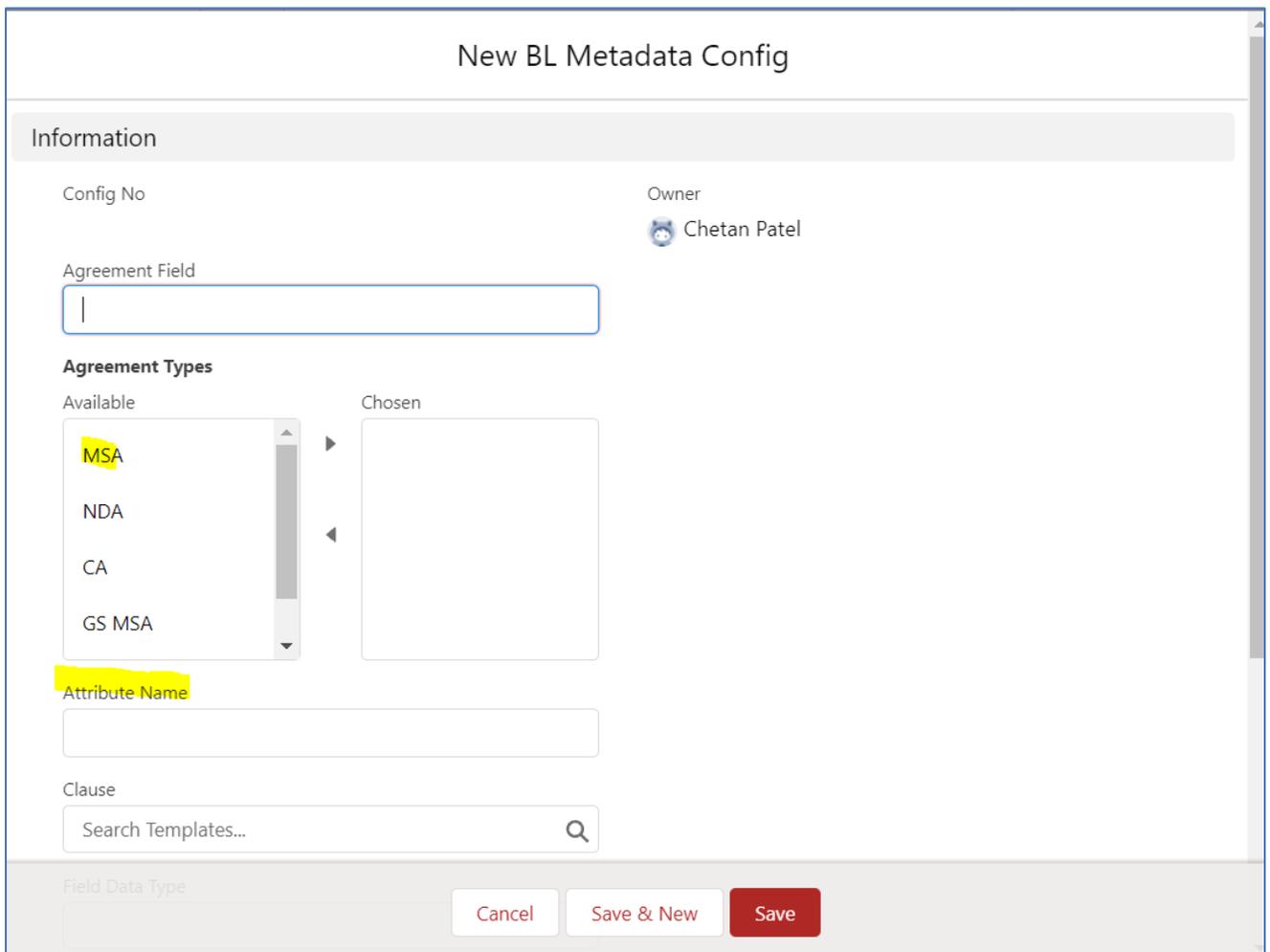
Brightleaf Standard attributes link: <https://www.brightleaf.com/standard-attribute>

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 Field	Type	Agreement Field	Attribute Name	Reference ...	Type of A...	Field Data Type
1	CN-0000	MSA	Clause	Assignment Clause			
2	CN-0001	MSA	Clause	Dispute Resolution Clause			

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



New BL Metadata Config

Information

Config No: _____ Owner: Chetan Patel

Agreement Field: _____

Agreement Types

Available: MSA, NDA, CA, GS MSA

Chosen: _____

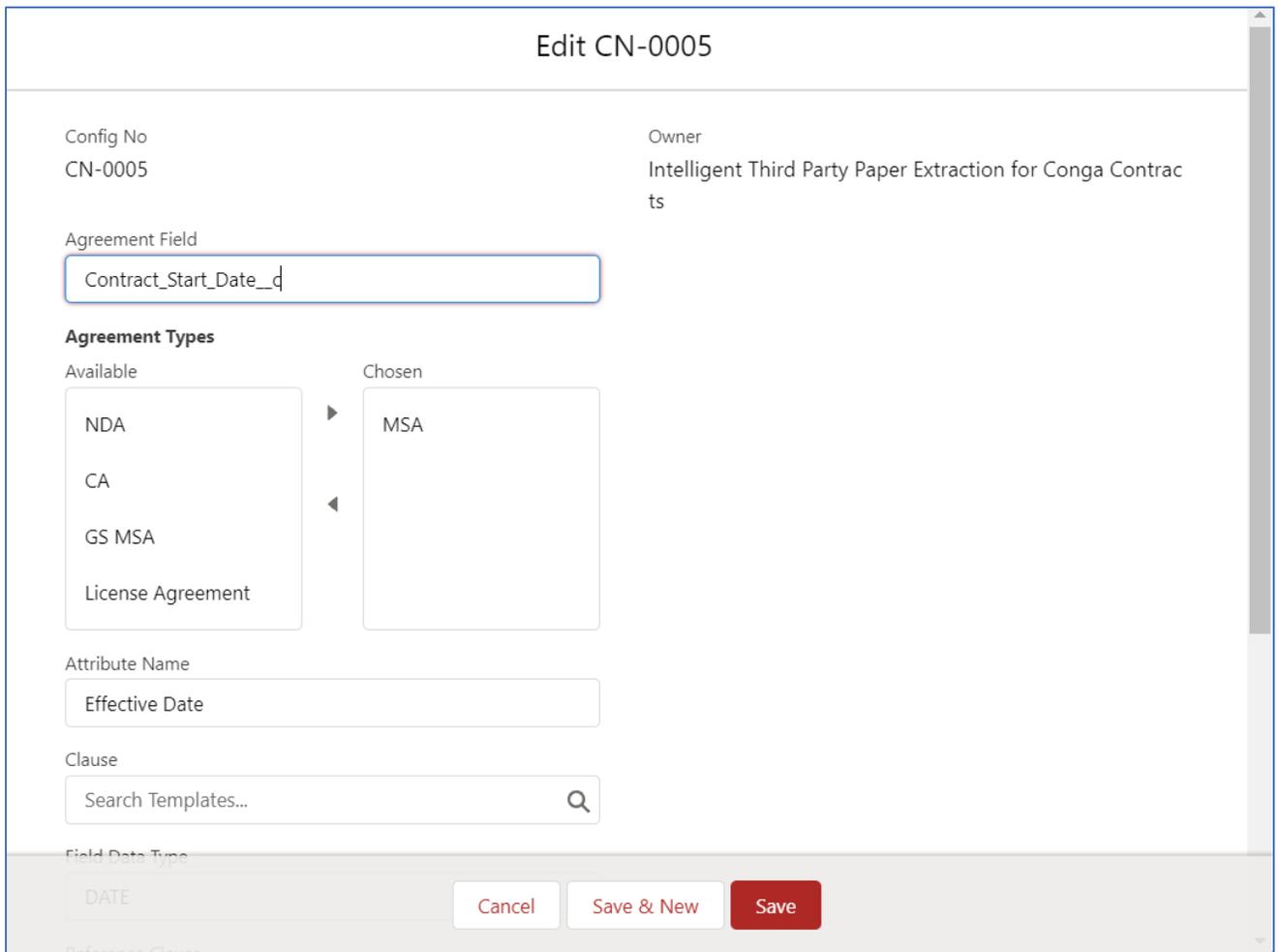
Attribute Name: _____

Clause: Search Templates... 🔍

Field Data Type: _____

Buttons: Cancel, Save & New, Save

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.



Config No
CN-0005

Owner
Intelligent Third Party Paper Extraction for Conga Contracts

Agreement Field
Contract_Start_Date_d

Agreement Types

Available

- NDA
- CA
- GS MSA
- License Agreement

Chosen

- MSA

Attribute Name
Effective Date

Clause
Search Templates...

Field Data Type
DATE

Cancel Save & New Save

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.

Search BL Metadata Configs and more...

Conga CLM Contract Agreements Templates Template Locales BL Agreement Actions BL Metadata Configs

BL Metadata Configs All

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

Config No	Agreemen...	Type	Agreement Field	Attribute Name	Reference ...	Type of A...	Field Data Type
1	MSA	Clause		Assignment Clause			
2	MSA	Clause		Dispute Resolution Clause			
3	MSA	Clause		Indemnity Clause			
4	MSA	Clause		Insurance Clause			
5	MSA	Clause		Payment Obligations Clause			
6	MSA	Field	Contract_Start_Date_c	Effective Date			DATE
7	MSA	Field	Counter_Party_c	Counterparty			STRING
8	MSA	Field	First_Party_c	First Party			STRING
9	MSA	Field	Governing_Law_c	Governing Law			STRING
10	MSA	Field	Name	Agreement Title			STRING
11	MSA	Field	Term_Months_c	Agreement Term			DOUBLE

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

New BL Metadata Config

Information

Config No Owner
Chetan Patel

Agreement Field

Agreement Types

Available: MSA, NDA, CA, GS MSA

Chosen:

Attribute Name

Clause: Search Templates...

Field Data Type

Reference Clause

Type: --None--

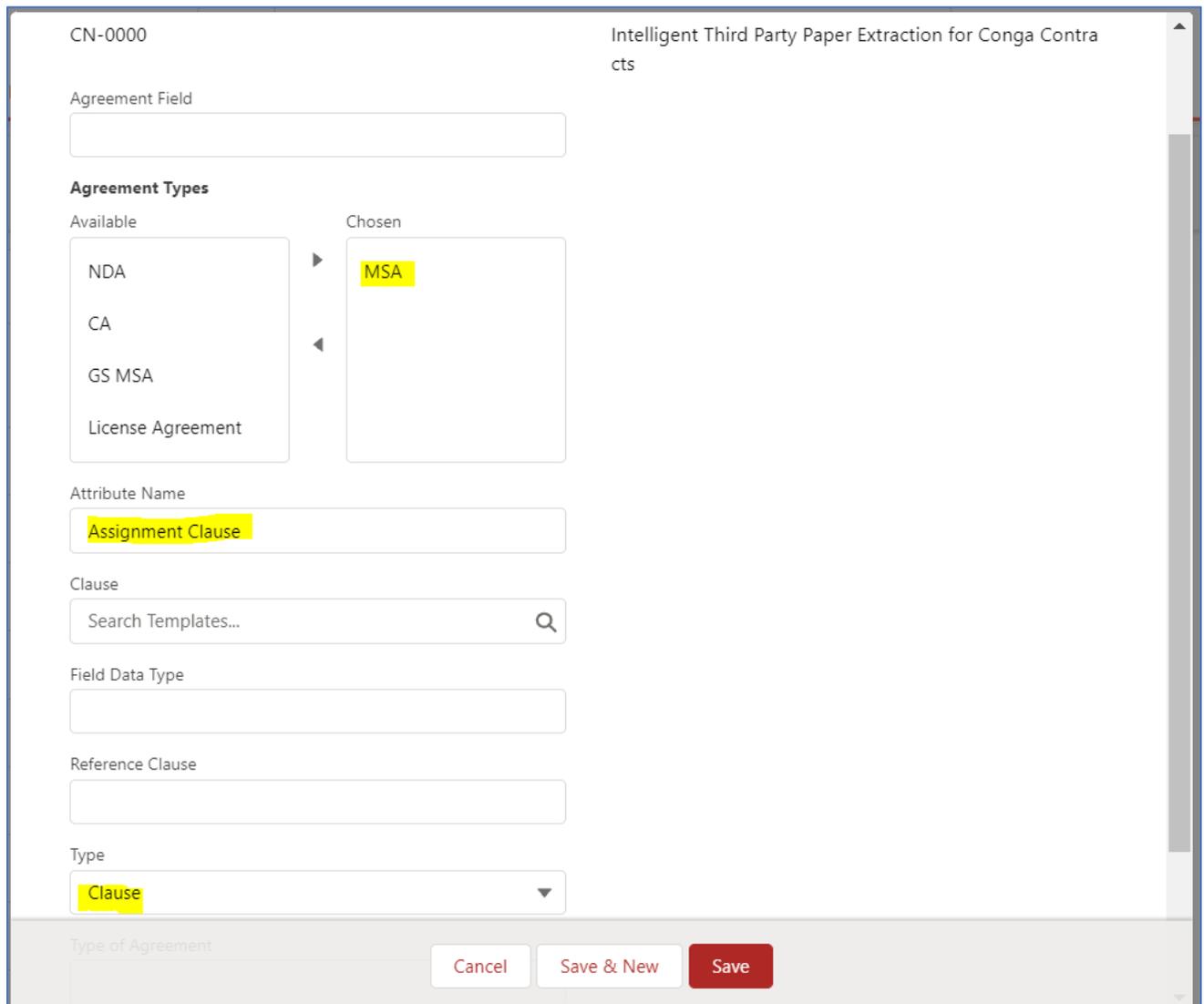
Type of Agreement

Cancel Save & New Save

6. For example, to create an attribute 'Assignment Clause', following steps to be performed:

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- 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.



CN-0000 Intelligent Third Party Paper Extraction for Conga Contracts

Agreement Field

Agreement Types

Available Chosen

NDA ▶ MSA

CA ◀

GS MSA

License Agreement

Attribute Name

Assignment Clause

Clause

Search Templates... 🔍

Field Data Type

Reference Clause

Type

Clause ▼

Type of Agreement

Cancel Save & New Save

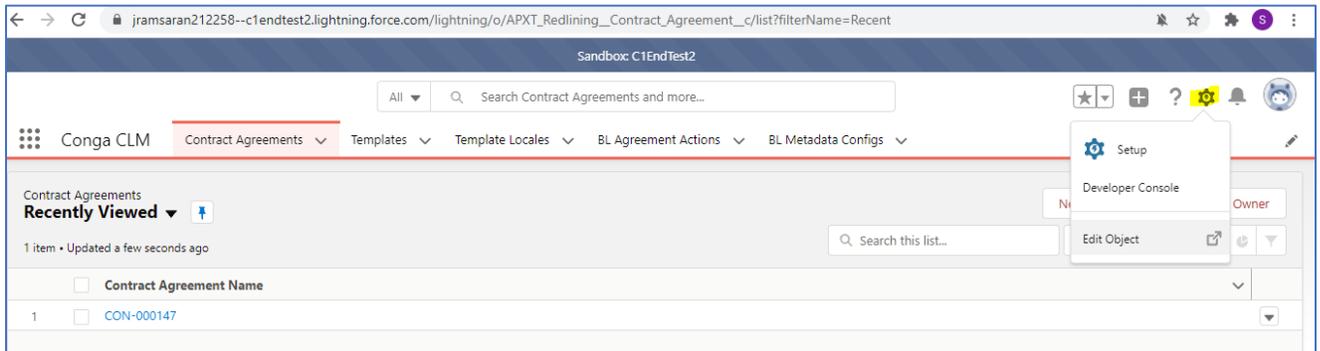
7. Now, for the above Assignment Clause, provide the Standard Clause Text using Templates Tab. Please refer to section Creation of Clause Library for this.

C. Creation of Agreement Fields

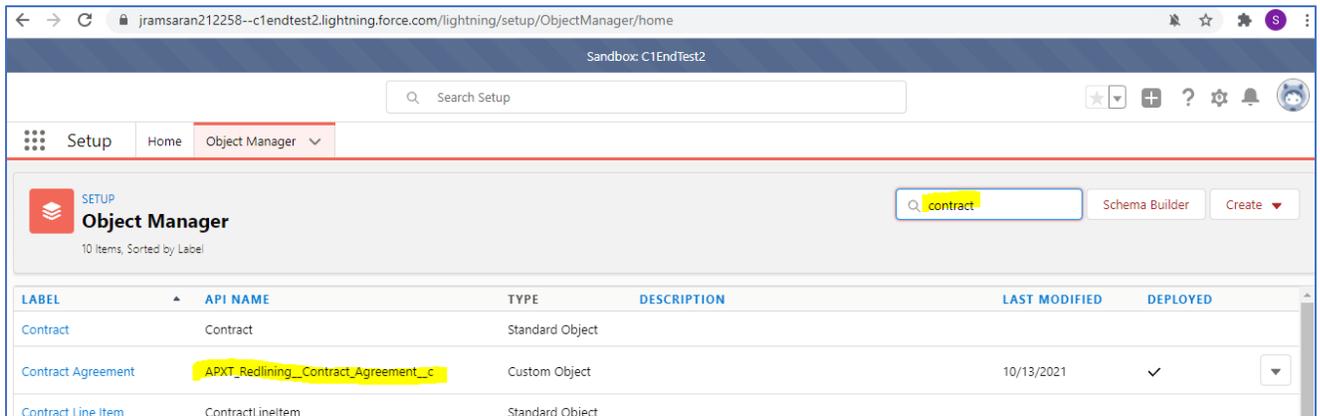
Once the attributes are created, Attribute Name has to be mapped with some Agreement Field. A Following steps required for an Agreement Field creation

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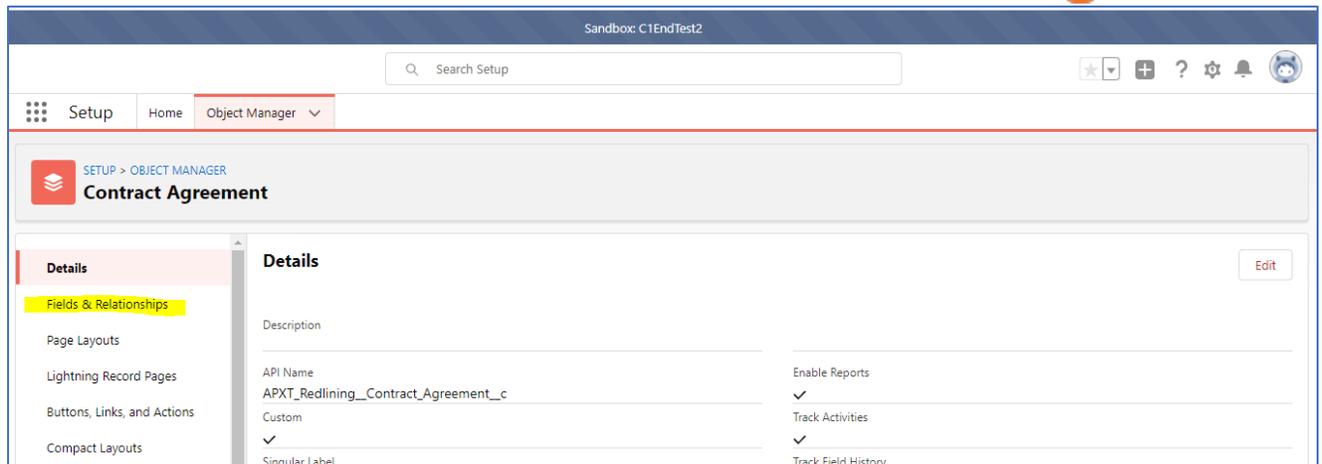
1. Click on Gear Icon as shown in below screenshot. A small menu will appear. From that menu, click on Setup. Refer to the screenshot below.



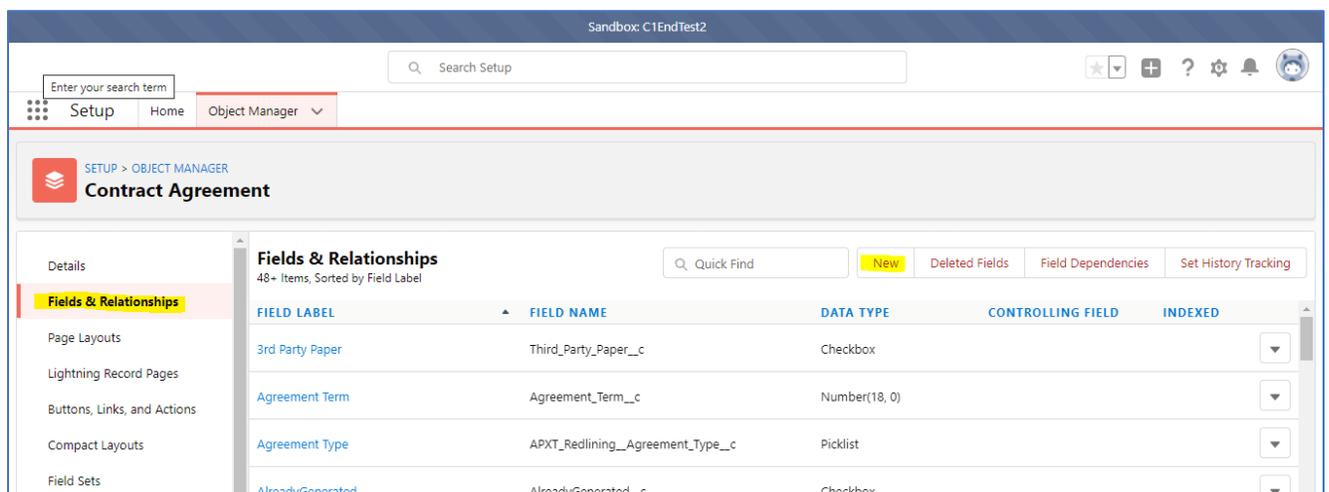
2. There will two tabs: 'Home' and 'Object Manager'. Click on the Object Manager tab. Type 'Contract Agreement' in search box. Refer to the screenshot below.



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.



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.

Agreement Help for this Page ?

New Custom Field

Step 1. Choose the field type
Step 1

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

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship i	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

★ + ? ⚙️ 🔔 👤

Setup Home Object Manager

SETUP > OBJECT MANAGER

Contract Agreement

<ul style="list-style-type: none"> Details <li style="background-color: #f0f0f0; padding: 2px;">Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters 	<ul style="list-style-type: none"> <input type="radio"/> Email <input type="radio"/> Geolocation <input type="radio"/> Number <input type="radio"/> Percent <input type="radio"/> Phone <input type="radio"/> Picklist <input type="radio"/> Picklist (Multi-Select) <input type="radio"/> Text <input checked="" type="radio"/> Text Area <input type="radio"/> Text Area (Long) <input type="radio"/> Text Area (Rich) <input type="radio"/> Text (Encrypted) i <input type="radio"/> Time <input type="radio"/> URL 	<p>Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.</p> <p>Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.</p> <p>Allows users to enter any number. Leading zeros are removed.</p> <p>Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.</p> <p>Allows users to enter any phone number. Automatically formats it as a phone number.</p> <p>Allows users to select a value from a list you define.</p> <p>Allows users to select multiple values from a list you define.</p> <p>Allows users to enter any combination of letters and numbers.</p> <p>Allows users to enter up to 255 characters on separate lines.</p> <p>Allows users to enter up to 131,072 characters on separate lines.</p> <p>Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.</p> <p>Allows users to enter any combination of letters and numbers and store them in encrypted form.</p> <p>Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.800" are all valid times for this field.</p> <p>Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.</p>
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

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.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Field Name

Description

Help Text

Required Always require a value in this field in order to save a record

Default Value

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Previous Next Cancel

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

SETUP > OBJECT MANAGER

Contract Agreement

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label Test
Data Type Text Area
Field Name Test
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
*Contracts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Customer Success	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Finance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*Salesforce Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Step 4. Add to page layouts Step 4 of 4

Field Label Test
 Data Type Text Area
 Field Name Test
 Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
 To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Types.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Contract Agreement Layout
<input checked="" type="checkbox"/>	Foundations Layout
<input checked="" type="checkbox"/>	MSA
<input checked="" type="checkbox"/>	Procurement - Vendor
<input checked="" type="checkbox"/>	Unified CLM Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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 "Expiration Date". In this example, 'Expiration Date' is considered as the 'Date' field and not the Formula field.

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

Sandbox: C1EndTest2

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Contract Agreement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

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.

Lookup Relationship
 Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship
 Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship
 Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox
 Allows users to select a True (checked) or False (unchecked) value.

Currency
 Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

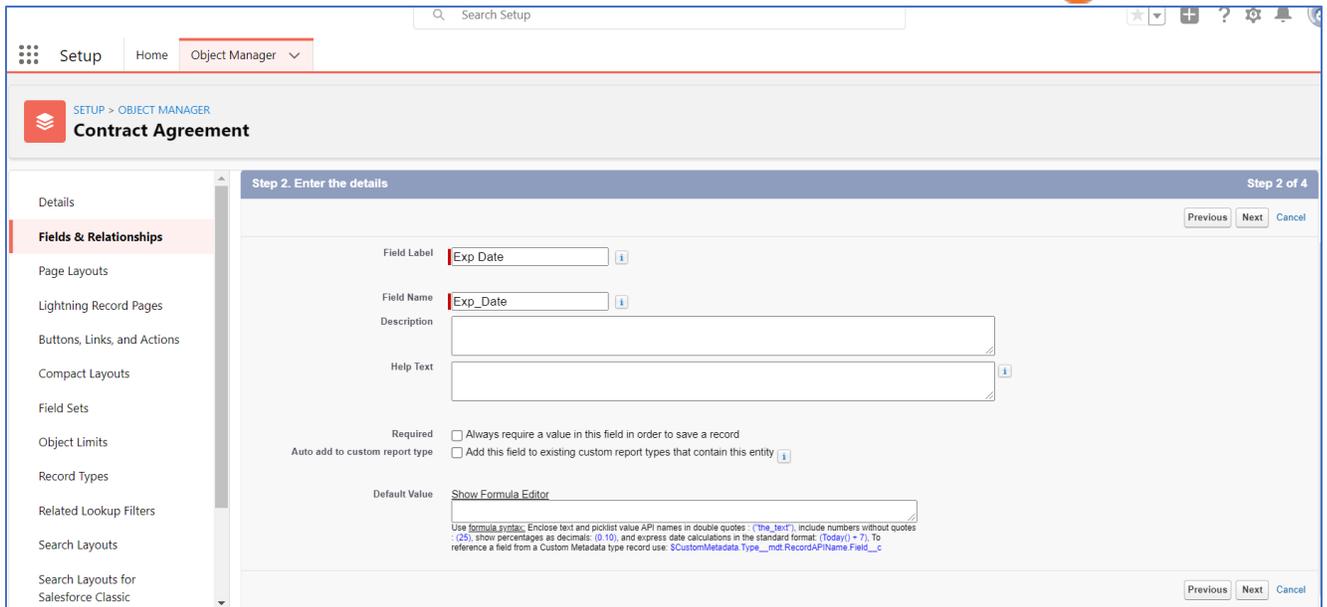
Date
 Allows users to enter a date or pick a date from a popup calendar.

Date/Time
 Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

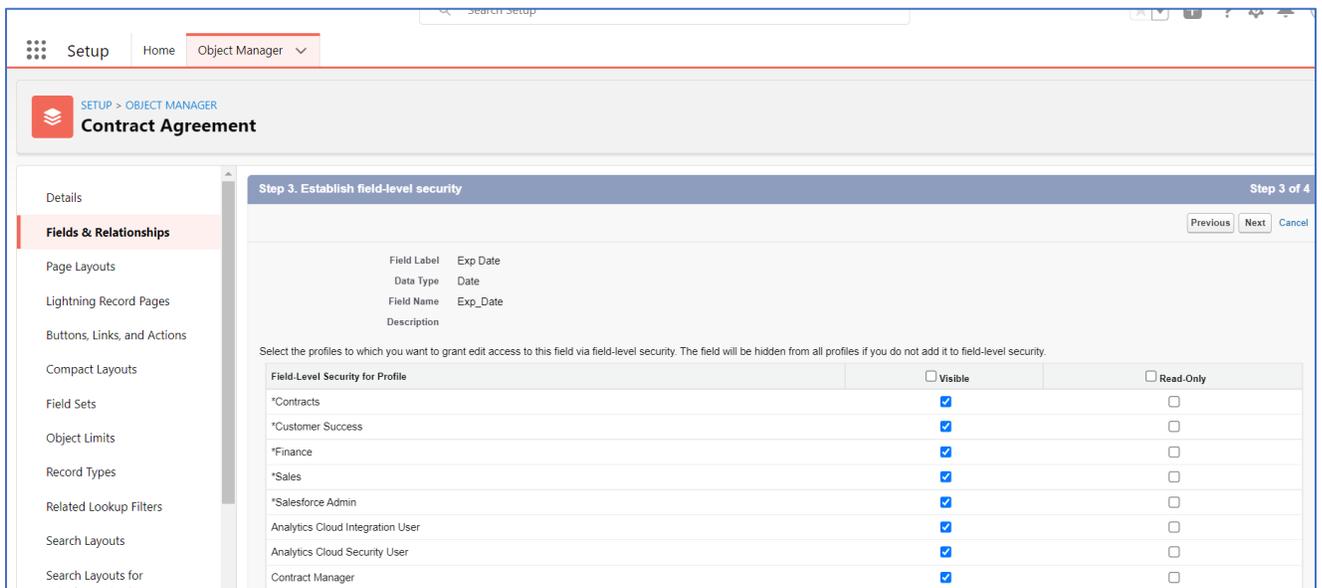
Email
 Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation
 Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

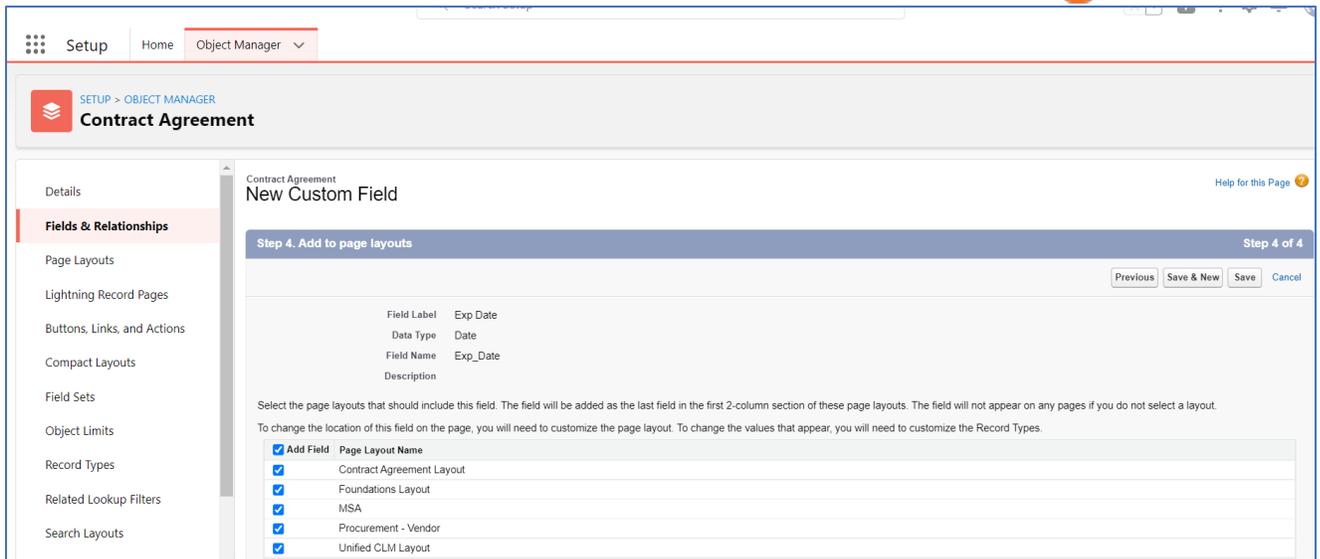
Step 2. Enter Field Label. Field Name will auto populate. Use has the ability to change the Field. Refer to the screenshot below:



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:



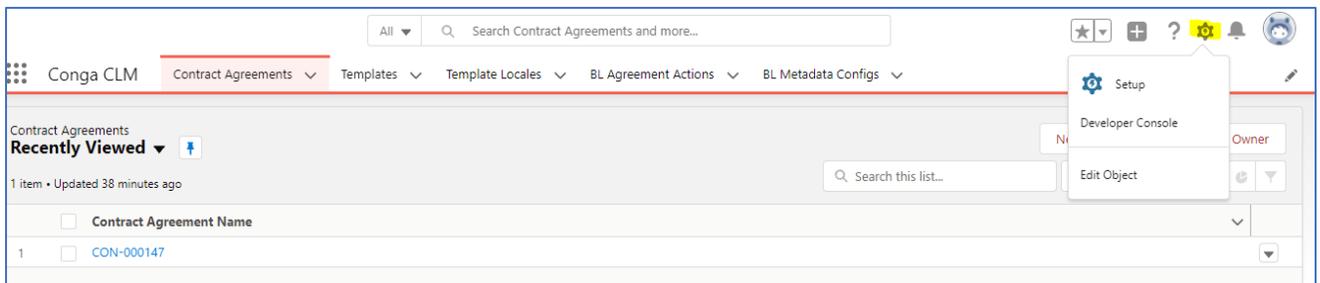
Click on 'Save' to show in the list of fields.

D. Add Agreement Field to Page Layout

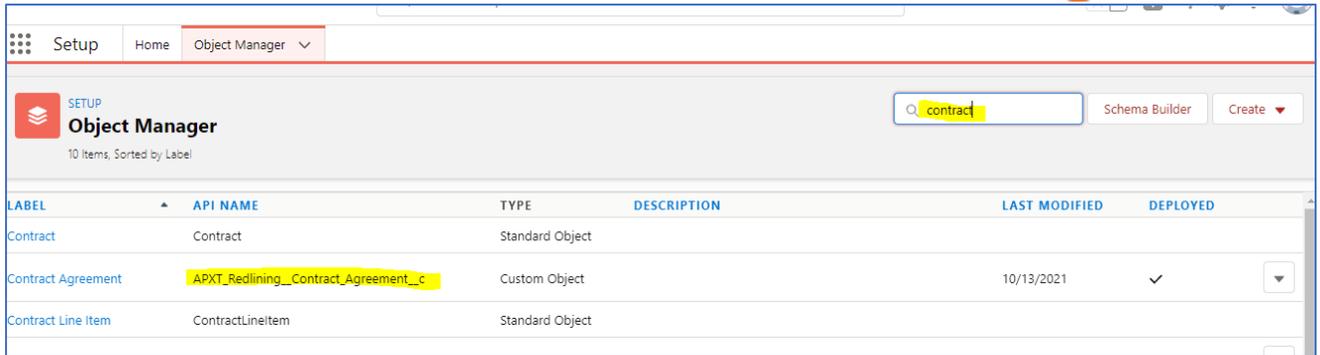
Once a custom field is created and defined in 'Fields and Relationship', the created field is to be added in a type of layout to show the attribute information in UI. There are predefined layouts available in CLM Platform application for different agreement types. These page layouts are customizable 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 two tabs "Home" and "Object Manager" tab. Click on Object Manager tab. Type 'Contract Agreement' in search box. Refer to the screenshot below.

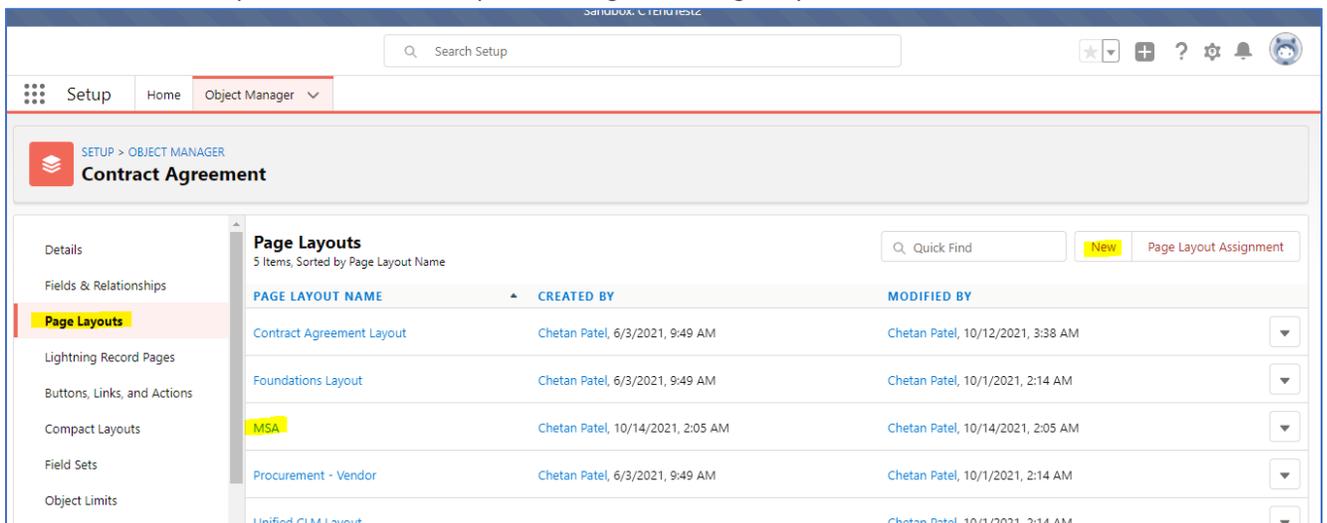


Object Manager

10 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Contract	Contract	Standard Object			
Contract Agreement	APXT_Redlining_Contract_Agreement_c	Custom Object		10/13/2021	✓
Contract Line Item	ContractLineItem	Standard Object			

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



Contract Agreement

Page Layouts

5 Items, Sorted by Page Layout Name

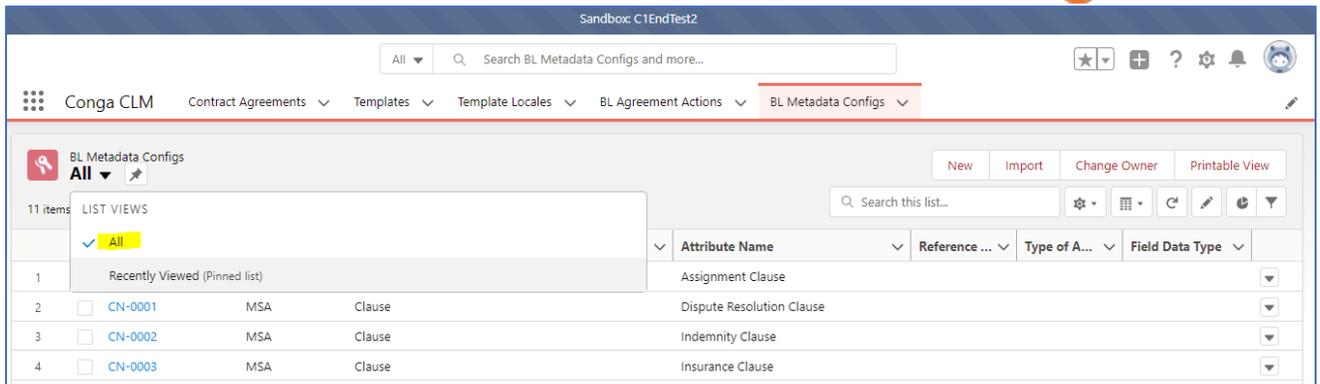
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Contract Agreement Layout	Chetan Patel, 6/3/2021, 9:49 AM	Chetan Patel, 10/12/2021, 3:38 AM
Foundations Layout	Chetan Patel, 6/3/2021, 9:49 AM	Chetan Patel, 10/1/2021, 2:14 AM
MSA	Chetan Patel, 10/14/2021, 2:05 AM	Chetan Patel, 10/14/2021, 2:05 AM
Procurement - Vendor	Chetan Patel, 6/3/2021, 9:49 AM	Chetan Patel, 10/1/2021, 2:14 AM
Unified CLM Layout	Chetan Patel, 10/1/2021, 2:14 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.

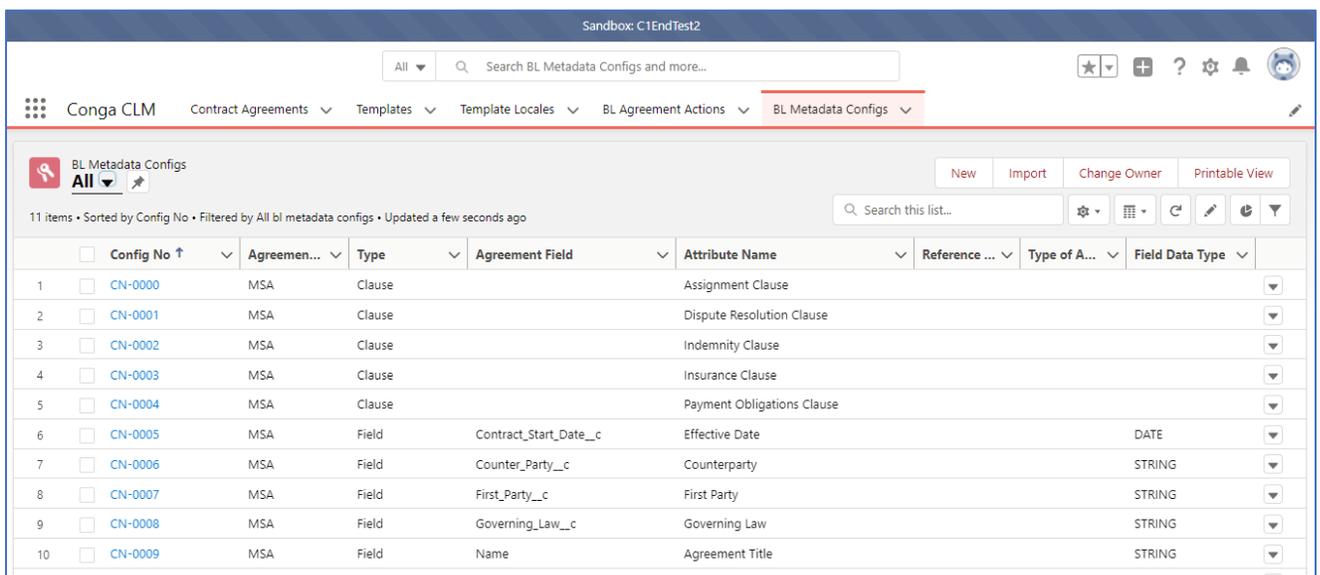
E. Map Agreement Field with Attribute Name (with Type defined as Field)

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.



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.



c) In the list shown, there are two columns "Agreement Field" and "Attribute Name"

d) Click on Edit pencil in front of any Agreement Field against any "Attribute Name"

e) 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".

f) Click on Save. Refer to the screenshot below.

Sandbox: C1EndTest2

All Search BL Metadata Configs and more...

Conga CLM Contract Agreements Templates Template Locales BL Agreement Actions BL Metadata Configs

BL Metadata Configs All

11 items • Sorted by Config No • Filtered by All bl metadata configs • Updated 4 minutes ago

Search this list...

Config No ↑	Agreemen...	Type	Agreement Field	Attribute Name	Reference ...	Type of A...	Field Data Type
1	CN-0000	MSA	Clause	Assignment Clause			
2	CN-0001	MSA	Clause	Dispute Resolution Clause			
3	CN-0002	MSA	Clause	Indemnity Clause			
4	CN-0003	MSA	Clause	Insurance Clause			
5	CN-0004	MSA	Clause	Payment Obligations Clause			
6	CN-0005	MSA	Field	Contract_Start_Date__c	Effective Date		DATE
7	CN-0006	MSA	Field	Counter_Party__c	Counterparty		STRING
8	CN-0007	MSA	Field	First_Party__c	First Party		STRING
9	CN-0008	MSA	Field	Governing_Law__c	Governing Law		STRING

Sandbox: C1EndTest2

All Search BL Metadata Configs and more...

Conga CLM Contract Agreements Templates Template Locales BL Agreement Actions BL Metadata Configs

BL Metadata Configs All

11 items • Sorted by Config No • Filtered by All bl metadata configs • Updated 10 minutes ago

Search this list...

Config No ↑	Agreemen...	Type	Agreement Field	Attribute Name	Reference ...	Type of A...	Field Data Type
1	CN-0000	MSA	Clause	Assignment Clause			
2	CN-0001	MSA	Clause	Dispute Resolution Clause			
3	CN-0002	MSA	Clause	Indemnity Clause			
4	CN-0003	MSA	Clause	Insurance Clause			
5	CN-0004	MSA	Clause	Payment Obligations Clause			
6	CN-0005	MSA	Field	Contract_Start_Date__c	Effective Date		DATE
7	CN-0006	MSA	Field	Counter_Party__c	Counterparty		STRING
8	CN-0007	MSA	Field	First_Party__c	First Party		STRING
9	CN-0008	MSA	Field	Governing_Law__c	Governing Law		STRING
10	CN-0009	MSA	Field	Name	Agreement Title		STRING
11	CN-0010	MSA	Field	Term_Months__c	Agreement Term		DOUBLE

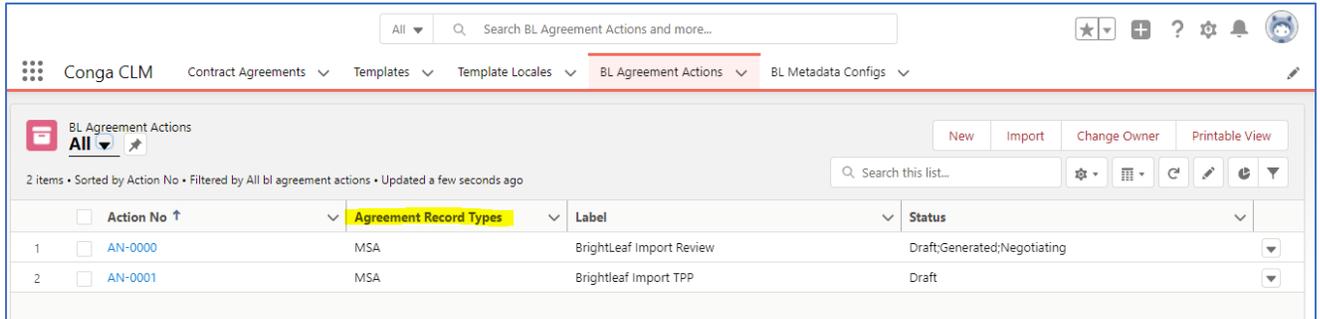
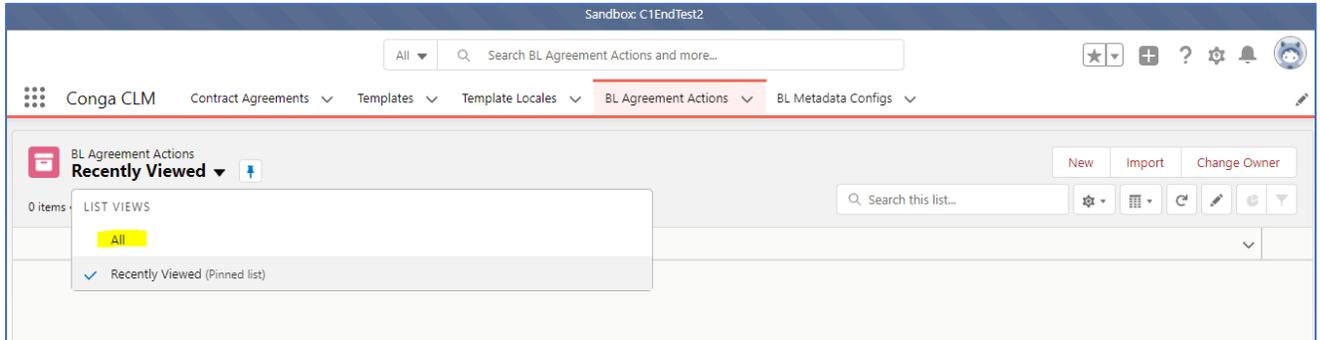
Cancel Save

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

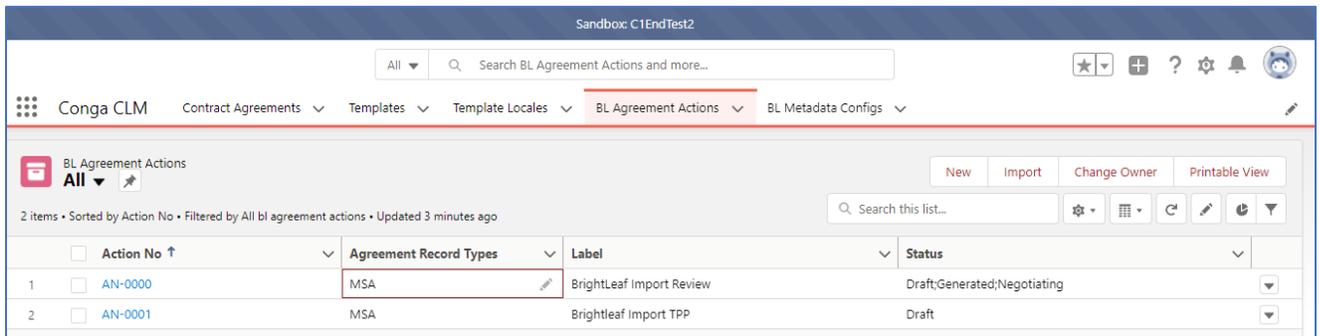
Note: For illustration purpose, the Agreement Action buttons mapping shown below is for the Record Type 'MSA'. To display these buttons for a particular Record Type, these buttons are to be mapped to that specific Record Type.

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.

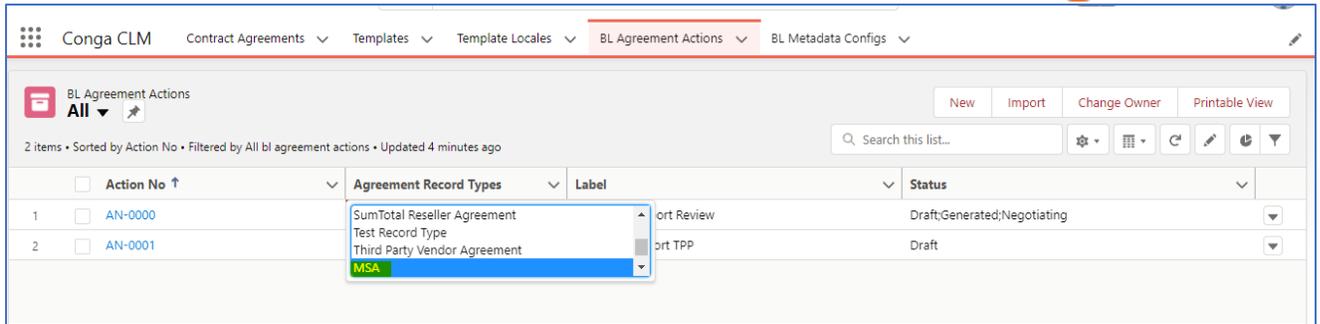
There are two custom Agreement Action buttons for TPP upload/import and the TPP data review. These action buttons are mapped with some set of Record Types. The action buttons will be displayed only for the Record Types selected for these action buttons. Refer to the screenshot below.



To get these action buttons on a particular record type, click on edit pencil in column Agreement Record Type against any row. Refer to the screenshot below.

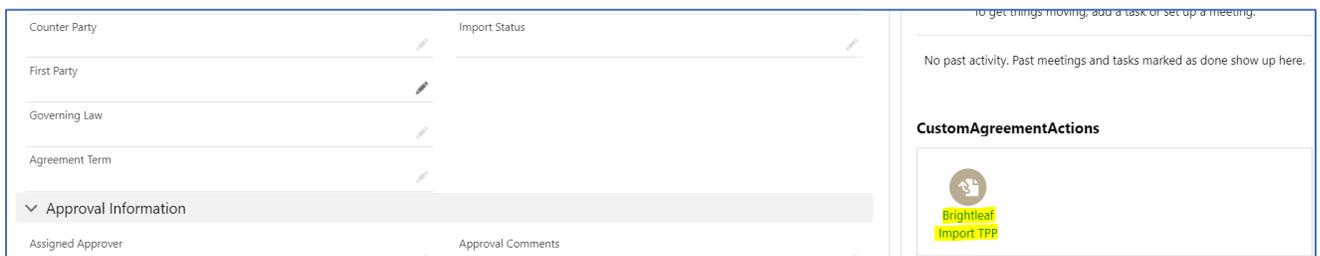


On click of edit pencil will show the list of Agreement Record Types available and the Record Types for which buttons will appear as selected. Refer to the screenshot below.

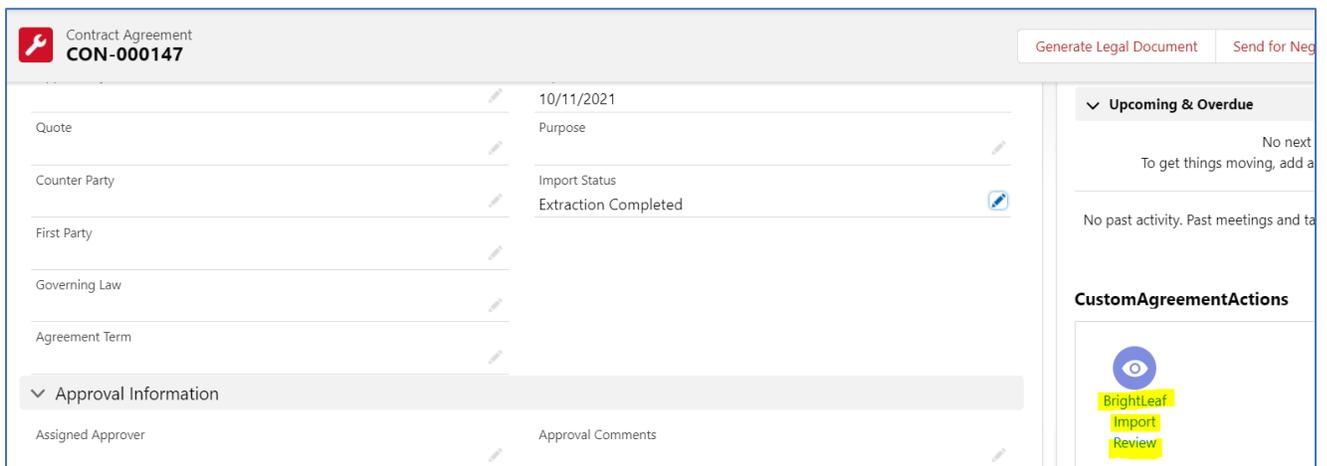


Action No	Agreement Record Types	Label	Status
1 AN-0000	SumTotal Reseller Agreement	ort Review	Draft;Generated;Negotiating
2 AN-0001	Test Record Type	ort TPP	Draft
	Third Party Vendor Agreement		
	MSA		

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

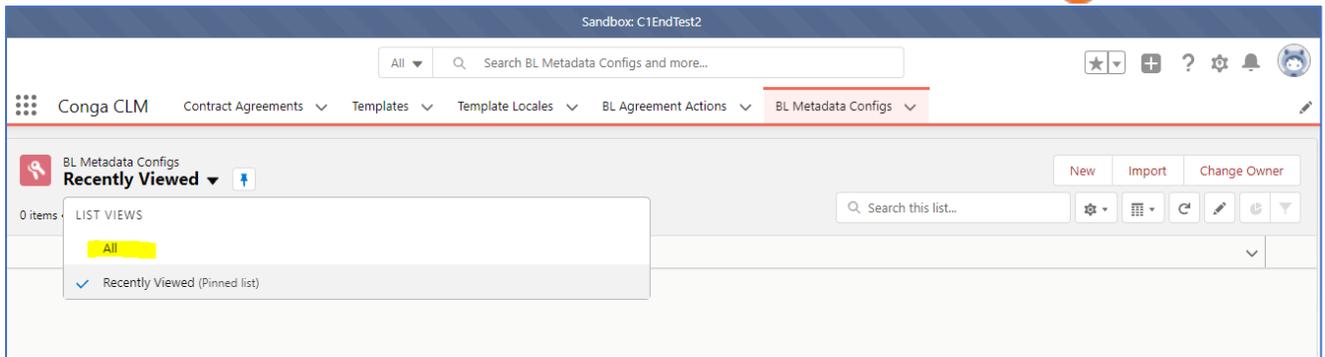


The custom Brightleaf TPP Import Review will appear once the success full extraction is completed.

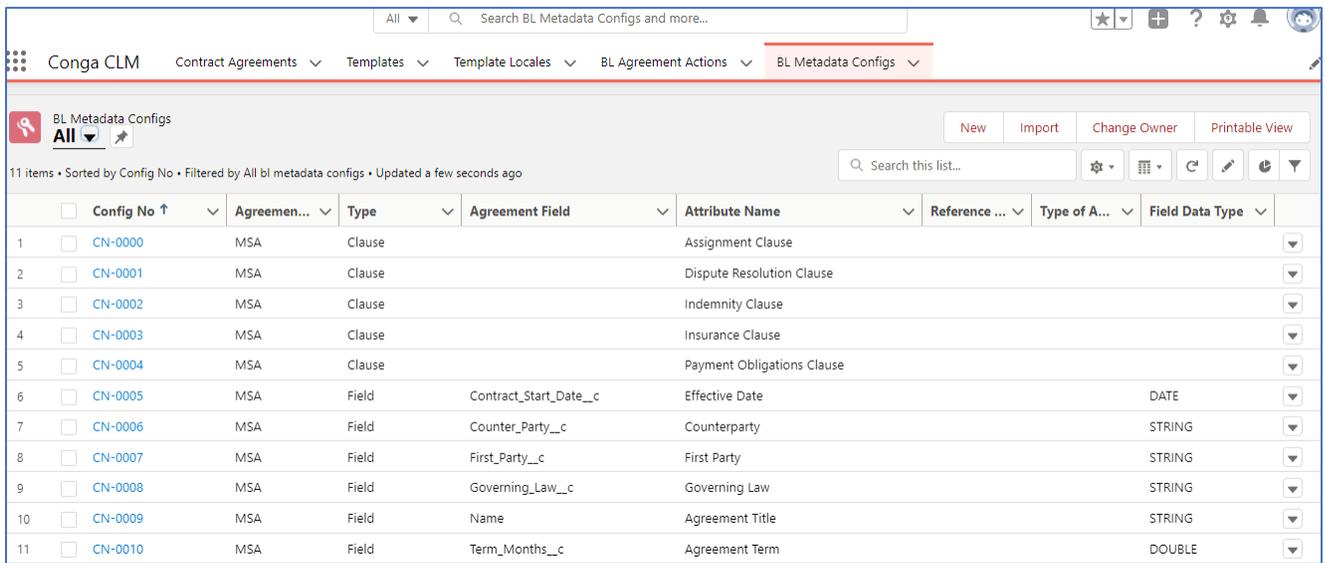


G. List of Created Attributes

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.



a. 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.



Config No	Agreement	Type	Agreement Field	Attribute Name	Reference	Type of A...	Field Data Type
1	MSA	Clause		Assignment Clause			
2	MSA	Clause		Dispute Resolution Clause			
3	MSA	Clause		Indemnity Clause			
4	MSA	Clause		Insurance Clause			
5	MSA	Clause		Payment Obligations Clause			
6	MSA	Field	Contract_Start_Date__c	Effective Date			DATE
7	MSA	Field	Counter_Party__c	Counterparty			STRING
8	MSA	Field	First_Party__c	First Party			STRING
9	MSA	Field	Governing_Law__c	Governing Law			STRING
10	MSA	Field	Name	Agreement Title			STRING
11	MSA	Field	Term_Months__c	Agreement Term			DOUBLE

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

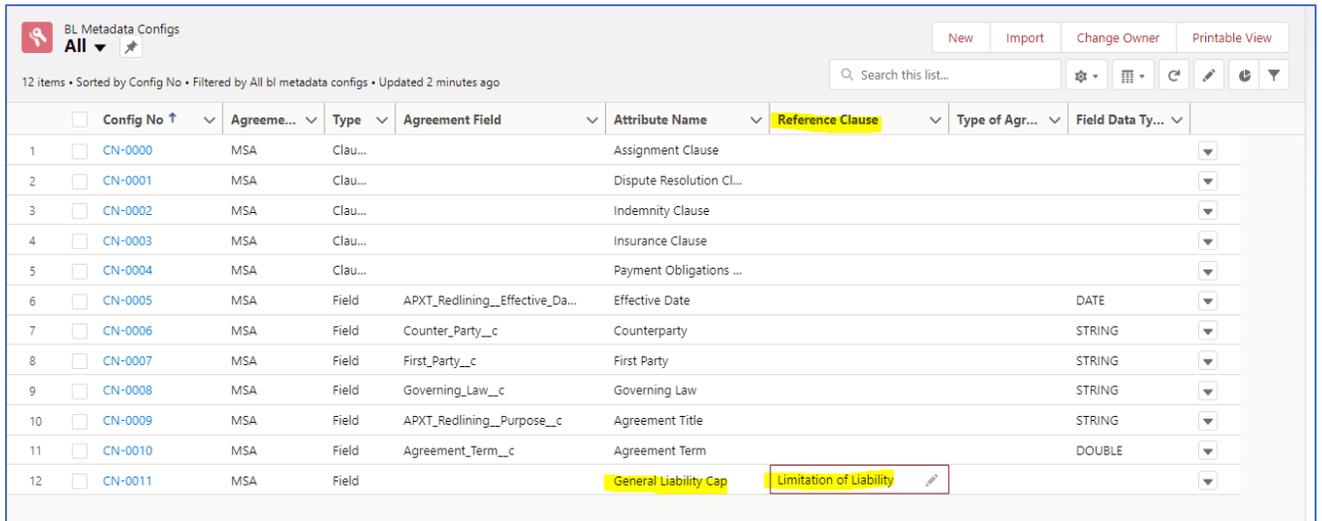
On the BL Metadata Config tab, there is an option to map Attribute Name (Field) with another Attribute Name (Clause). This mapping is for the 'Reference Clause'. This helps to view the clause details from which the meta data field information is captured (without navigating to the Clause Tab). The clause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

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f) Refer to the screenshot below which will appear after performing steps a) to e)



Config No	Agreement	Type	Agreement Field	Attribute Name	Reference Clause	Type of Agr...	Field Data Ty...
1	CN-0000	MSA	Clau...	Assignment Clause			
2	CN-0001	MSA	Clau...	Dispute Resolution Cl...			
3	CN-0002	MSA	Clau...	Indemnity Clause			
4	CN-0003	MSA	Clau...	Insurance Clause			
5	CN-0004	MSA	Clau...	Payment Obligations ...			
6	CN-0005	MSA	Field	APXT_Redlining__Effective_Da...	Effective Date		DATE
7	CN-0006	MSA	Field	Counter_Party__c	Counterparty		STRING
8	CN-0007	MSA	Field	First_Party__c	First Party		STRING
9	CN-0008	MSA	Field	Governing_Law__c	Governing Law		STRING
10	CN-0009	MSA	Field	APXT_Redlining__Purpose__c	Agreement Title		STRING
11	CN-0010	MSA	Field	Agreement_Term__c	Agreement Term		DOUBLE
12	CN-0011	MSA	Field	General Liability Cap	Limitation of Liability		

Clause Library

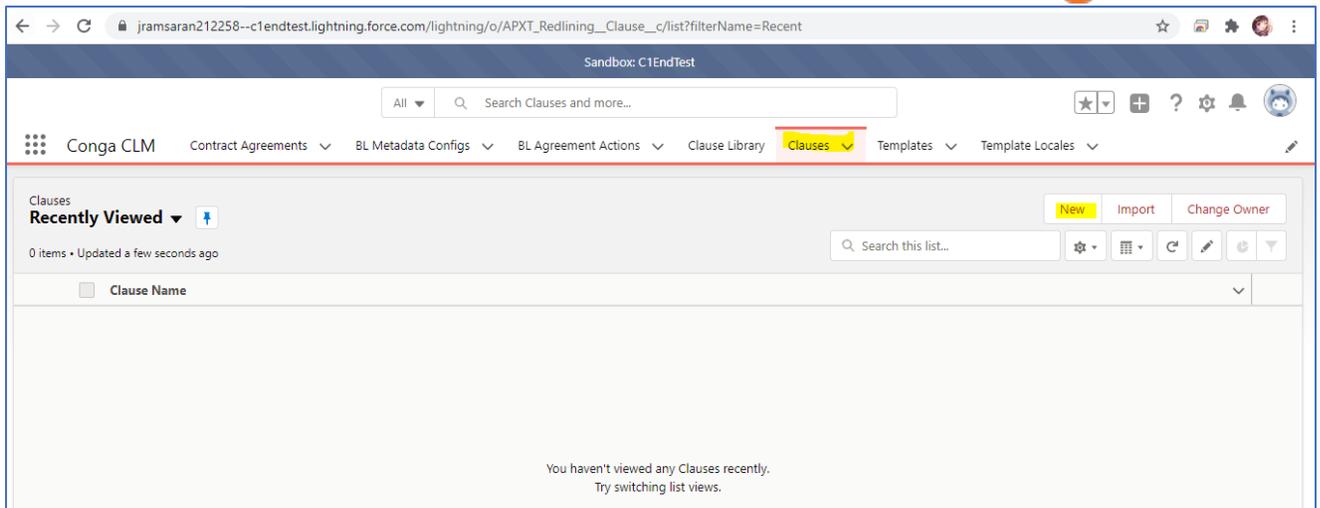
The Clause Library is the place where all the standard language of different clauses are defined and configured. The standard language of any clause will be used for the redlining purpose to show what is the deviation of the extracted clause text w.r.t to the defined standard clause from an agreement.

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

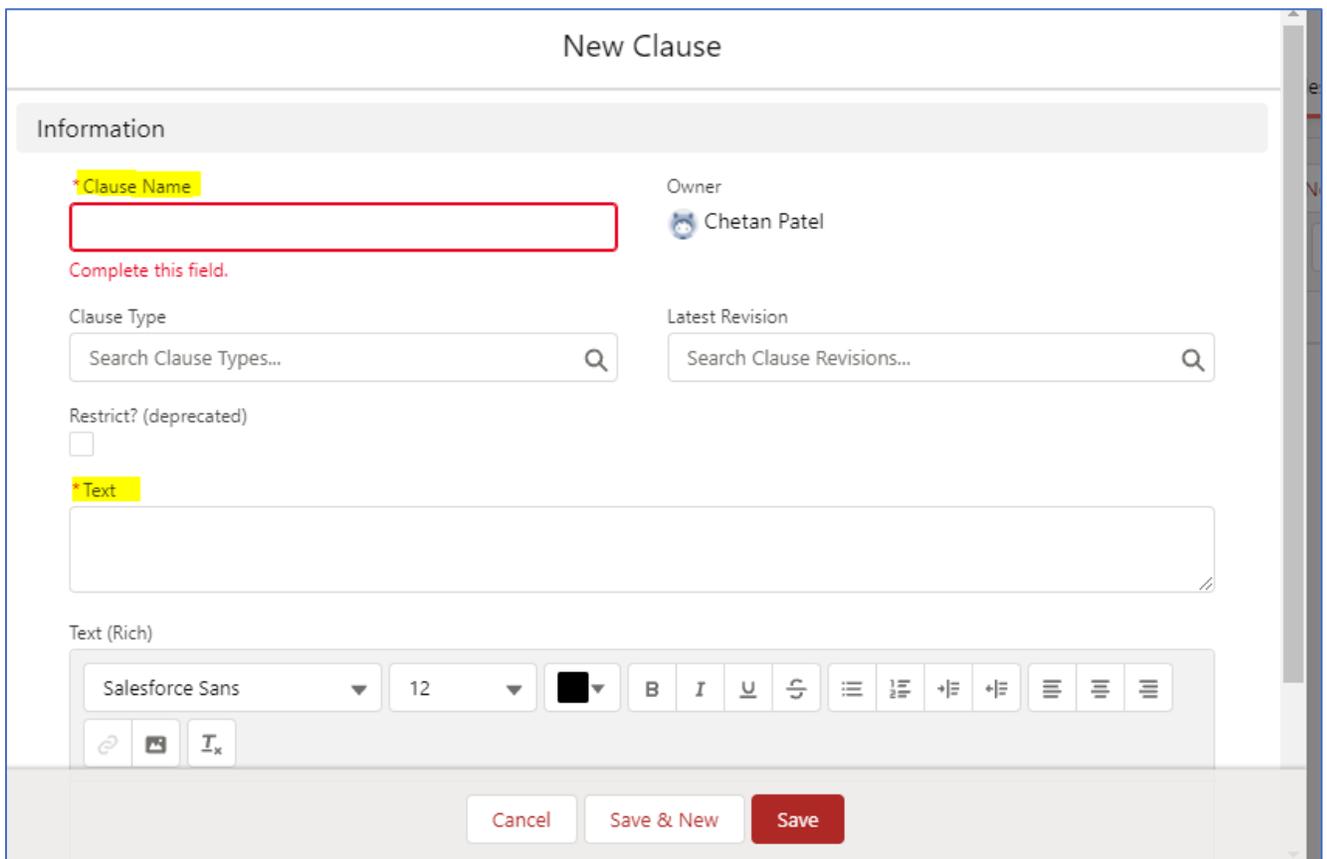
1. Creation of standard clause
2. Map standard clause text with clause

A. Creation of Standard Clause Text

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



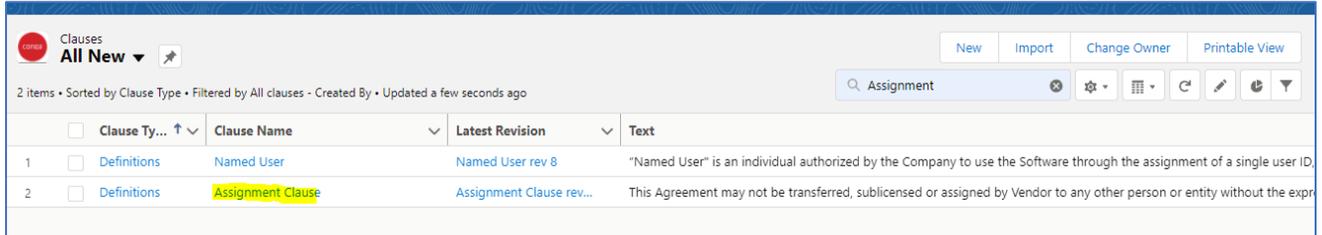
2. From the top-right, click on 'New' to create/define a standard language for a clause. Refer to the screenshot below.



3. For example, to create standard language for 'Assignment Clause', following steps are performed:

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- a. Provide Clause Name as 'Assignment Standard Clause'
 - b. Provide Clause Text
 - c. Once above information filled, click on Save.
- Refer to the screenshot below.



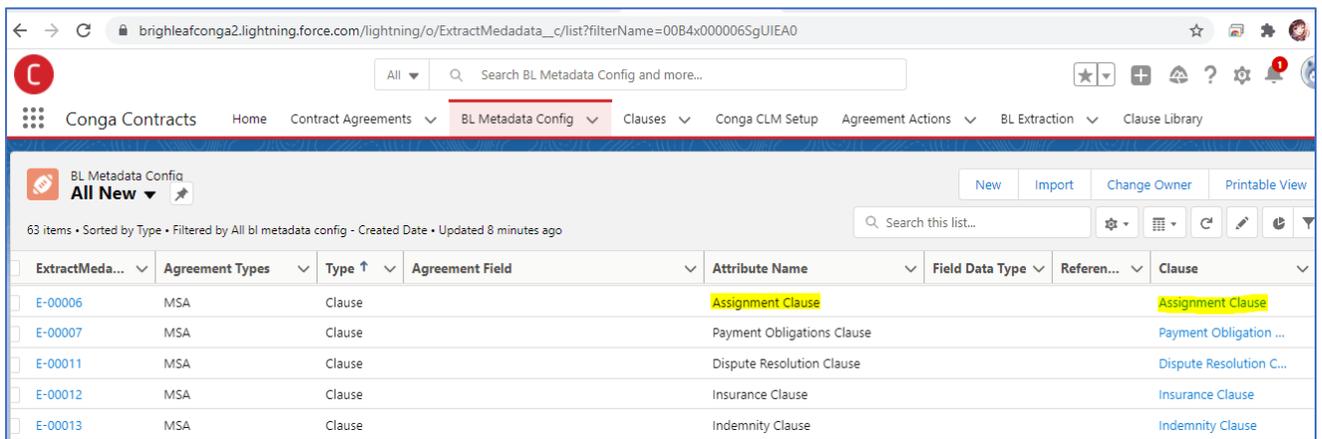
Clause Ty...	Clause Name	Latest Revision	Text
1	Named User	Named User rev 8	"Named User" is an individual authorized by the Company to use the Software through the assignment of a single user ID.
2	Assignment Clause	Assignment Clause rev...	This Agreement may not be transferred, sublicensed or assigned by Vendor to any other person or entity without the expr

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:

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

Refer to the screenshot below.



ExtractMeda...	Agreement Types	Type	Agreement Field	Attribute Name	Field Data Type	Referen...	Clause
E-00006	MSA	Clause	Assignment Clause	Assignment Clause	Assignment Clause	Assignment Clause	Assignment Clause
E-00007	MSA	Clause	Payment Obligations Clause				
E-00011	MSA	Clause	Dispute Resolution Clause	Dispute Resolution Clause	Dispute Resolution Clause	Dispute Resolution Clause	Dispute Resolution Clause
E-00012	MSA	Clause	Insurance Clause	Insurance Clause	Insurance Clause	Insurance Clause	Insurance Clause
E-00013	MSA	Clause	Indemnity Clause	Indemnity Clause	Indemnity Clause	Indemnity Clause	Indemnity Clause

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.

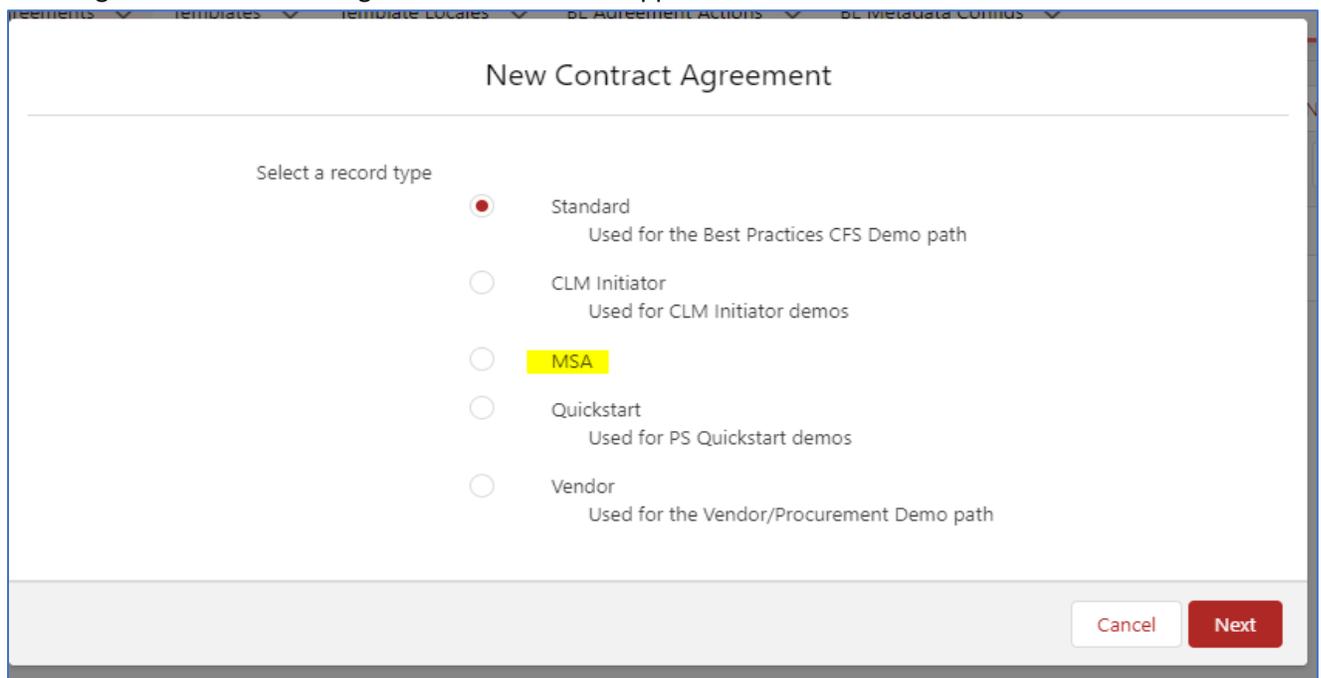
Following sections explain the creation of an Agreement

- 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 a web form titled "New Contract Agreement". Under the heading "Select a record type", there are five radio button options:

- Standard
Used for the Best Practices CFS Demo path
- CLM Initiator
Used for CLM Initiator demos
- MSA (highlighted in yellow)
- Quickstart
Used for PS Quickstart demos
- Vendor
Used for the Vendor/Procurement Demo path

At the bottom right of the form, there are two buttons: "Cancel" and "Next".

- 2. Select one of the record types of which agreement is to be uploaded.
- 3. Next, fill the basic information like Agreement Name, Account Name, Start Date, Term etc. The Status Category and Status should be 'Request' and Brightleaf Import Status should be 'None'

New Contract Agreement: MSA

Information

Contract Agreement Name	<input type="text"/>	* Status 	<input type="text" value="Draft"/>
* Customer Account 	<input type="text" value="Test Account"/> 	Import Status	<input type="text" value="--None--"/>
Primary Contact	<input type="text" value="Search Contacts..."/> 	Owner	 Chetan Patel
Opportunity	<input type="text" value="Search Opportunities..."/> 	Legal Owner	<input type="text" value="Search People..."/> 
Quote	<input type="text" value="Search Quotes..."/> 	* Effective Date 	<input type="text" value="10/18/2021"/> 
Counter Party	<input type="text"/>	Record Type	MSA

First Party

Renewal Interval (months)

Group

Default Group

Conga Details

Agreement Type ?

--None--

*Type ?

Lease

*Background Mode (Create Document)

Save to Files

Parent Contract Agreement ?

Search Contract Agreements...

Track Changes

3rd Party Paper

Use Recursive Merge

Recursive Merge Status

Sync

Template

Search Templates...

Output Format

Word - DOCX

Cancel Save & New Save

Sandbox: C1EndTest2

All Search Contract Agreements and more...

Conga CLM Contract Agreements Templates Template Locales BL Agreement Actions BL Metadata Configs

Contract Agreement **CON-000147** Generate Legal Document Send for Negotiation

Contract Agreement Name CON-000147	Status Draft
Customer Account Test	Owner Chetan Patel
Primary Contact	Legal Owner
Record Type MSA	Effective Date 10/12/2021
Opportunity	Expiration Date 10/11/2021
Quote	Purpose
Counter Party	Import Status
First Party	
Governing Law	
Agreement Term	
Approval Information	
Assigned Approver	Approval Comments

Contract Agreement Activity for CON-000147

Chetan Patel uploaded 003_MSA_Soylent Corp

Filters: All time • All active Refresh

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

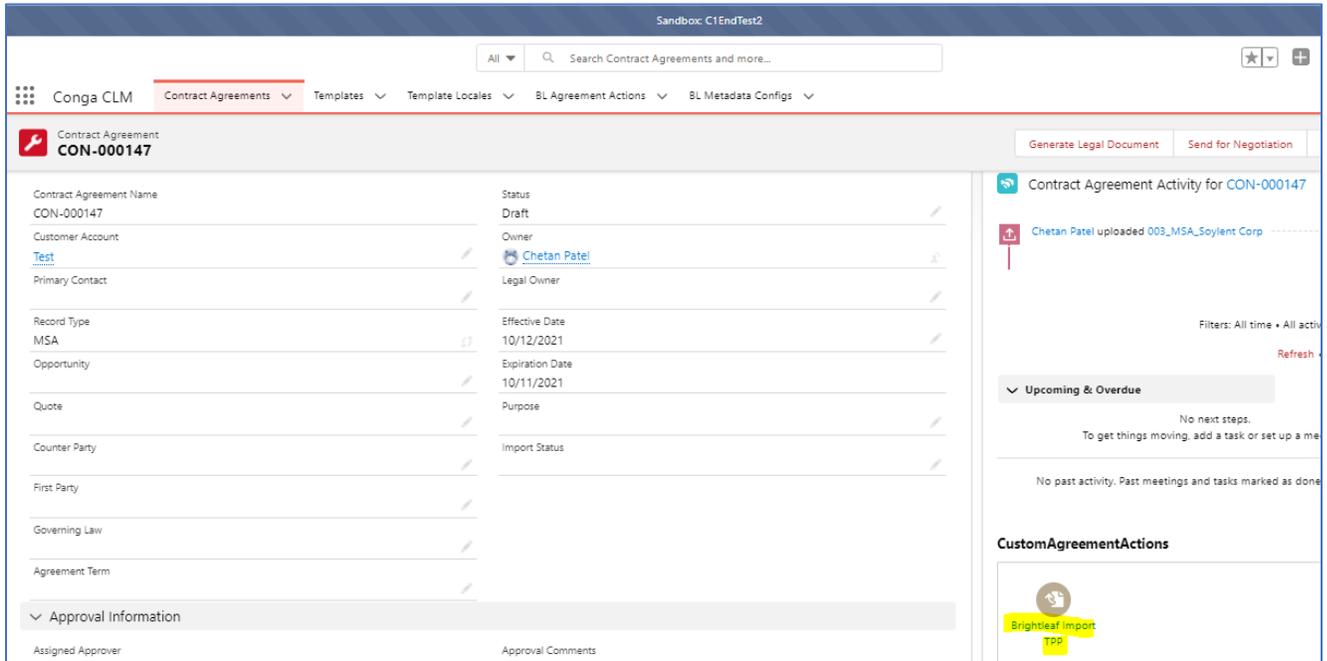
No past activity. Past meetings and tasks marked as done.

CustomAgreementActions

Brightleaf Import TPP

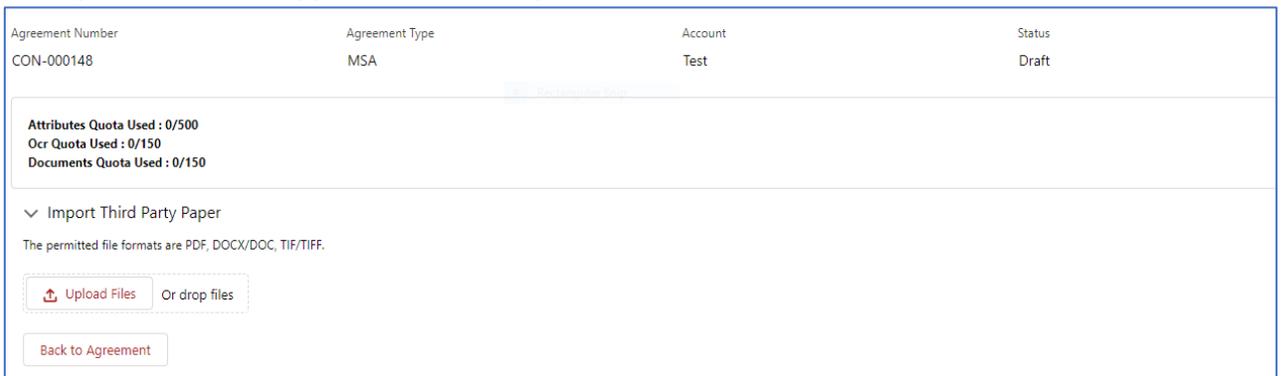
Upload TPP Agreement

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



The screenshot shows the 'Contract Agreement' detail page for 'CON-000147'. The page is titled 'Contract Agreement CON-000147' and includes a search bar and navigation tabs. The main content area is divided into two columns. The left column contains fields for 'Contract Agreement Name', 'Customer Account', 'Primary Contact', 'Record Type', 'Opportunity', 'Quote', 'Counter Party', 'First Party', 'Governing Law', and 'Agreement Term'. The right column contains fields for 'Status', 'Owner', 'Legal Owner', 'Effective Date', 'Expiration Date', 'Purpose', and 'Import Status'. Below these fields is an 'Approval Information' section. On the right side, there is a 'Contract Agreement Activity' section showing a recent activity: 'Chetan Patel uploaded 003_MSA_Soylent Corp'. Below this is an 'Upcoming & Overdue' section with a 'Refresh' button. At the bottom right, there is a 'CustomAgreementActions' section with a 'Brightleaf Import TPP' button highlighted in yellow.

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

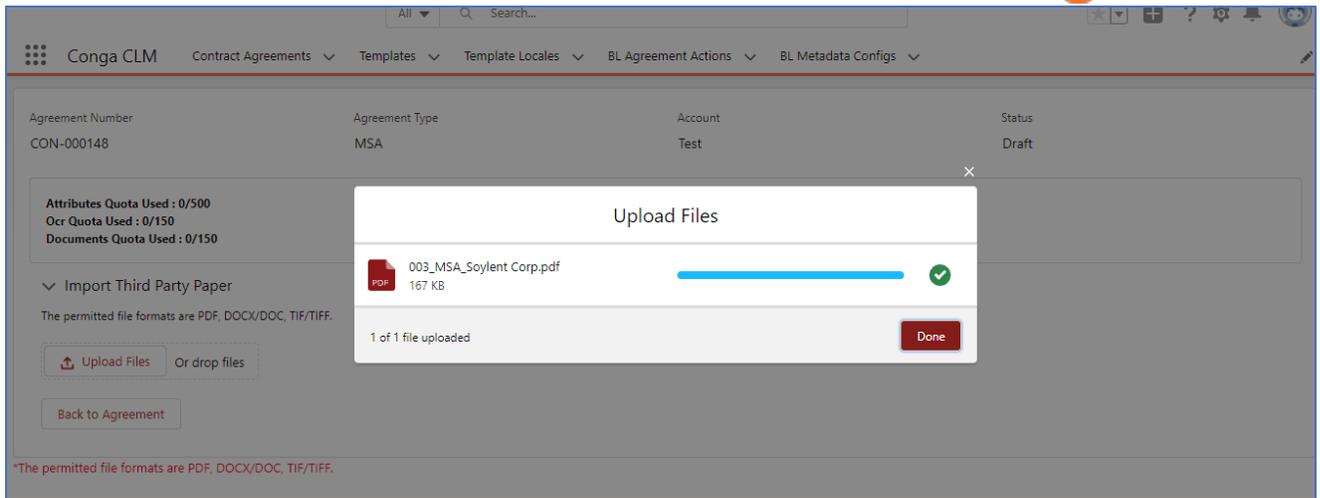


The screenshot shows the upload screen for a TPP Agreement. It features a table with the following data:

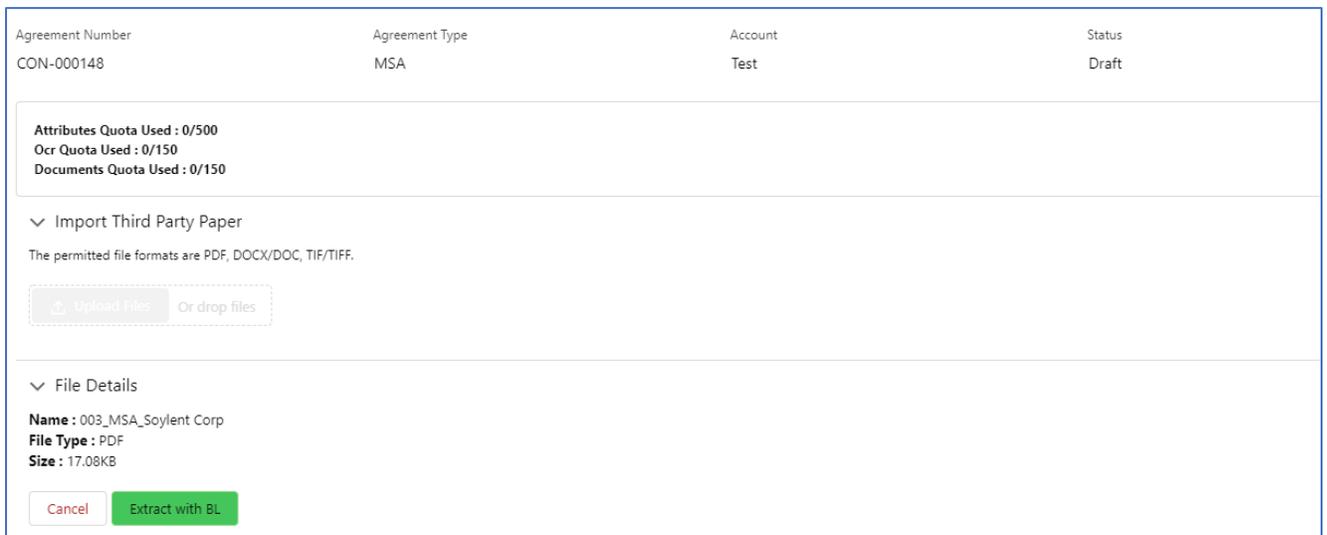
Agreement Number	Agreement Type	Account	Status
CON-000148	MSA	Test	Draft

Below the table, there are sections for 'Attributes Quota Used : 0/500', 'Ocr Quota Used : 0/150', and 'Documents Quota Used : 0/150'. There is a section for 'Import Third Party Paper' with the text 'The permitted file formats are PDF, DOCX/DOC, TIF/TIFF.' and an 'Upload Files' button with the text 'Or drop files'. A 'Back to Agreement' button is also present.

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



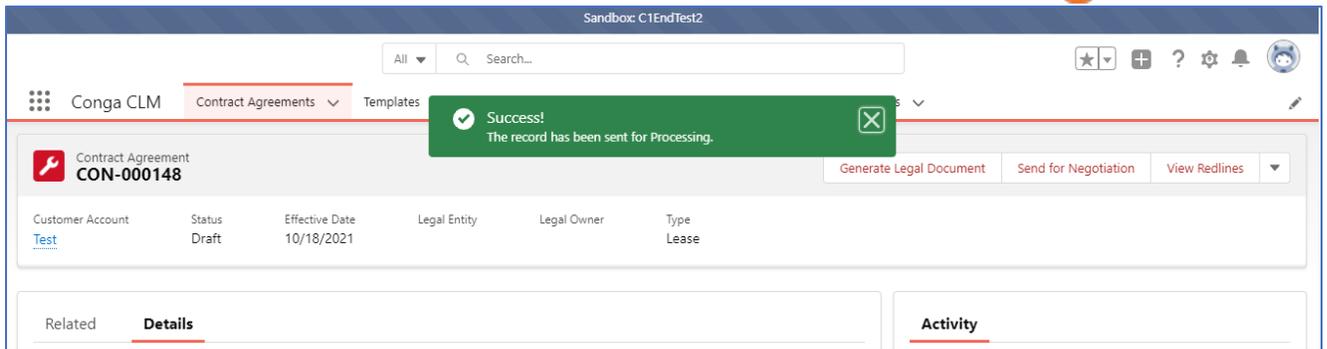
3. On successful upload, 'Extract with BL' button appears.



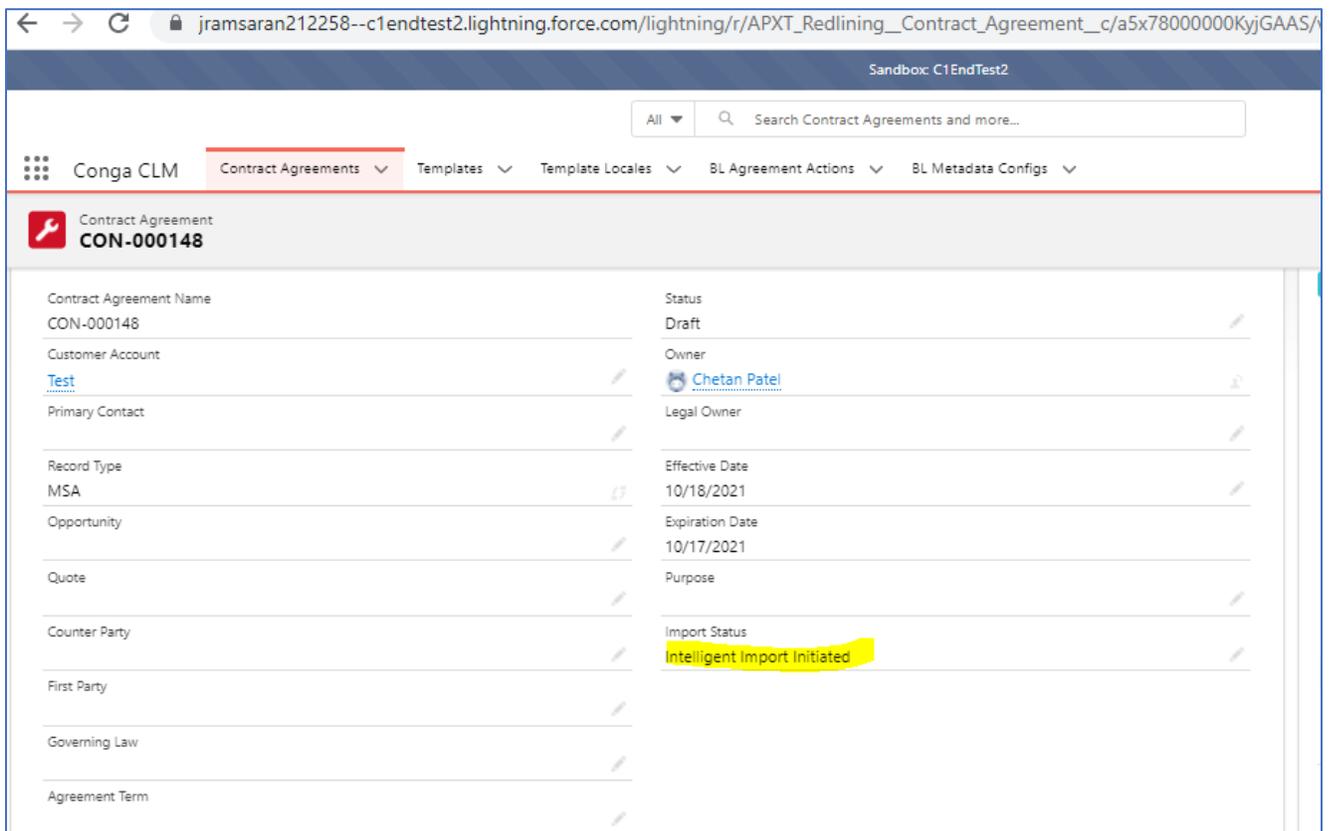
B. Extract from Brightleaf

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

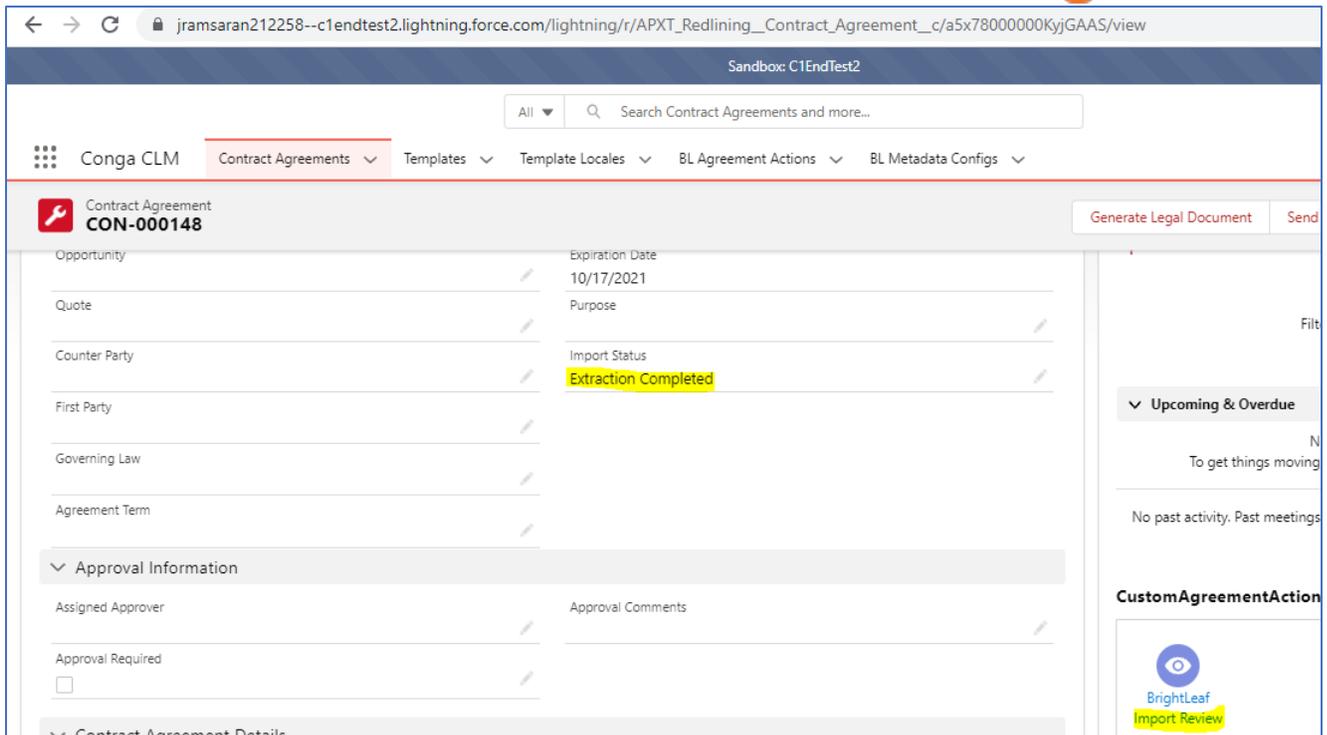
Screenshot - 1



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



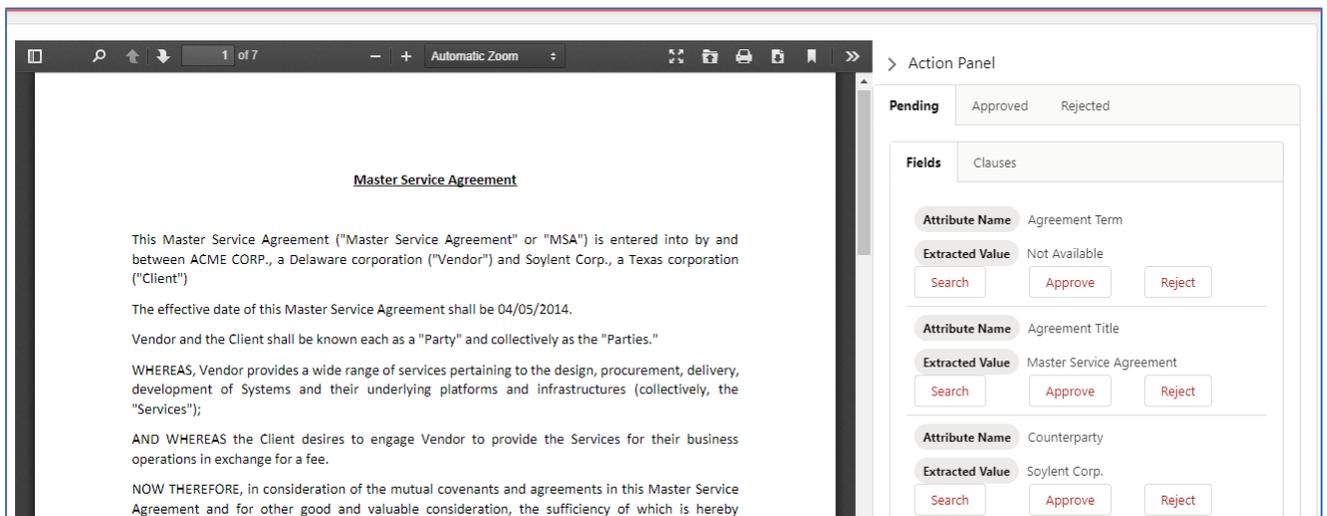
- Refresh the page Brightleaf Import Status to ‘Extraction Completed’ and the Brightleaf action button changes to ‘Brightleaf Import Review’. Refer to the screenshot below.



Verification of Extracted Results

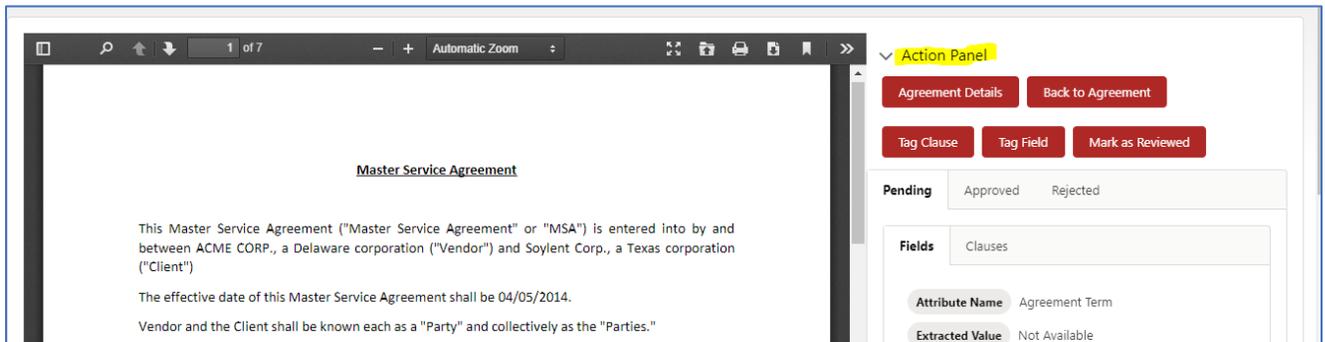
1. Once the TPP agreement is imported successfully, Brightleaf Import Status changes to 'Extraction Completed' and the Brightleaf action button changes to 'Brightleaf Import Review'. Click on 'Brightleaf Import Review'.

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:

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

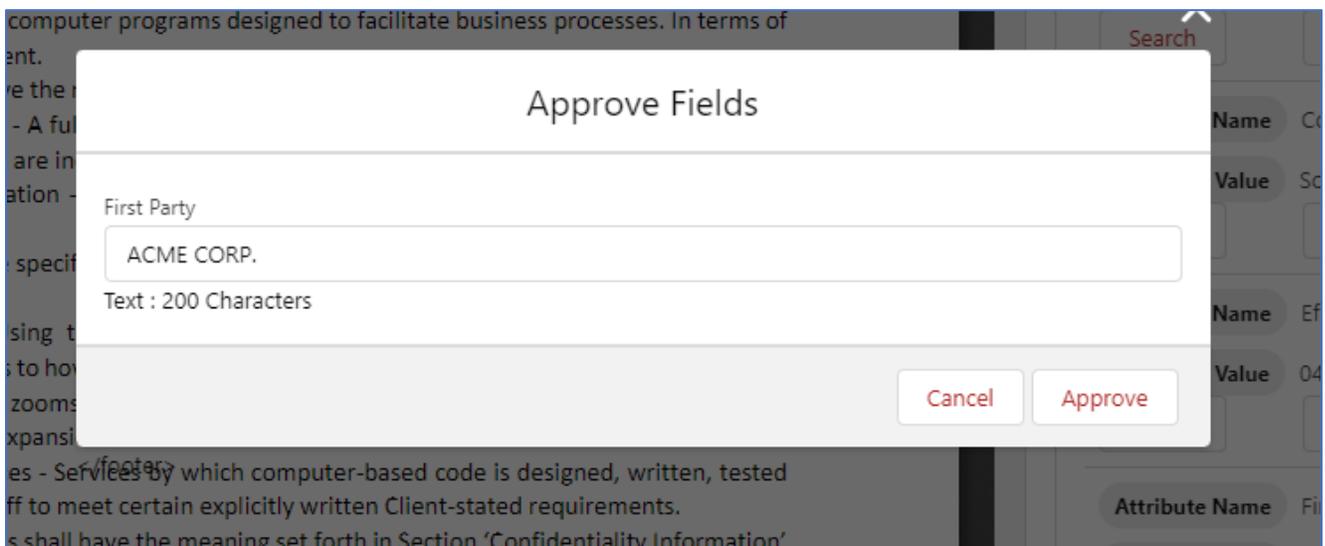


2. There are 3 tabs and each tab has 2 sub tabs [Fields and Clauses] on the right side. All fields appear on the Fields tab and all clauses appears on Clauses tab.
 - a. Pending tab: By default, all fields/clauses will appear in this tab.
 - b. Approved tab: All the approved fields/clauses will appear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

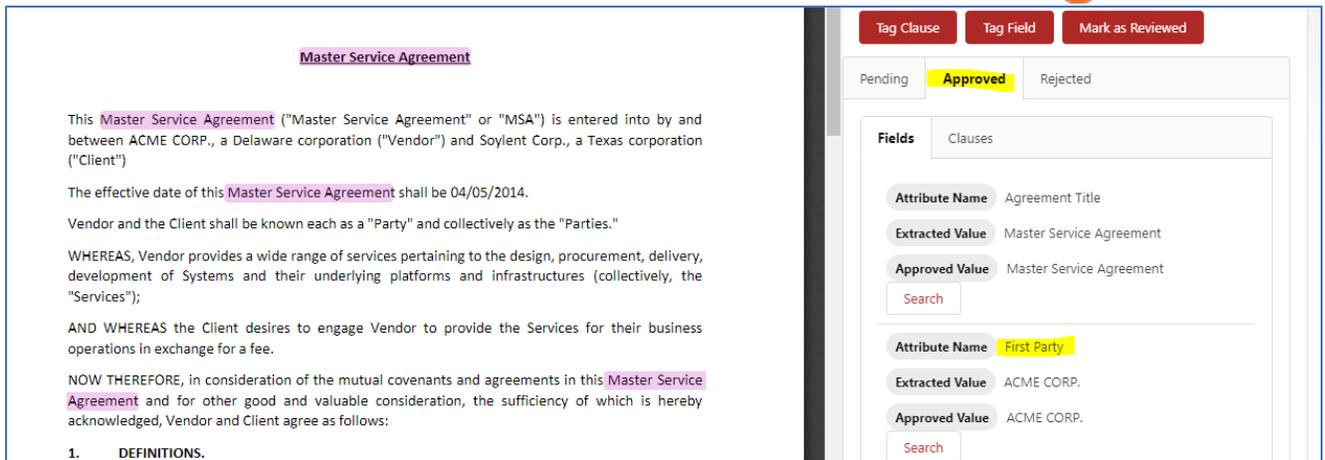
A. Change/Approve Attribute Name

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.



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.

Tag Clause Tag Field Mark as Reviewed

Pending **Approved** Rejected

Fields Clauses

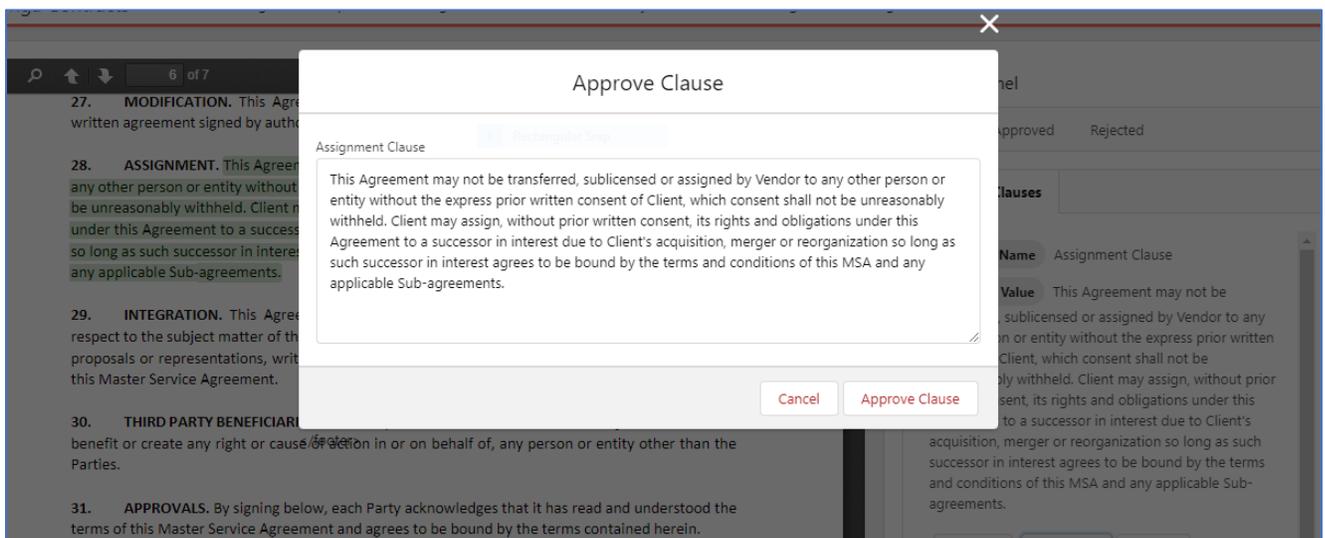
Attribute Name Agreement Title
 Extracted Value Master Service Agreement
 Approved Value Master Service Agreement
 Search

Attribute Name **First Party**
 Extracted Value ACME CORP.
 Approved Value ACME CORP.
 Search

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.



Approve Clause

Assignment Clause

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.

Cancel Approve Clause

27. MODIFICATION. This Agreement shall be a written agreement signed by authorized representatives of both parties.

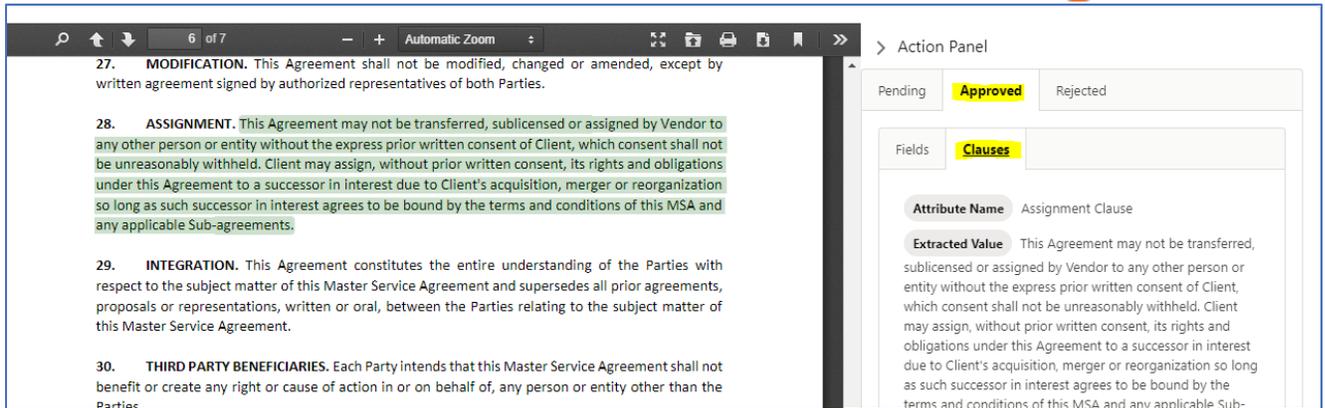
28. ASSIGNMENT. This Agreement may not be transferred, sublicensed or assigned by Vendor to any other person or entity without the express prior written consent of Client, which consent shall not be unreasonably withheld. Client may assign, without prior written consent, its rights and obligations under 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 shall constitute the entire agreement between the parties with respect to the subject matter of this Agreement and shall supersede all other proposals or representations, written or oral, made in connection with this Master Service Agreement.

30. THIRD PARTY BENEFICIARIES. No person or entity shall be deemed to be a third party beneficiary or to 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.

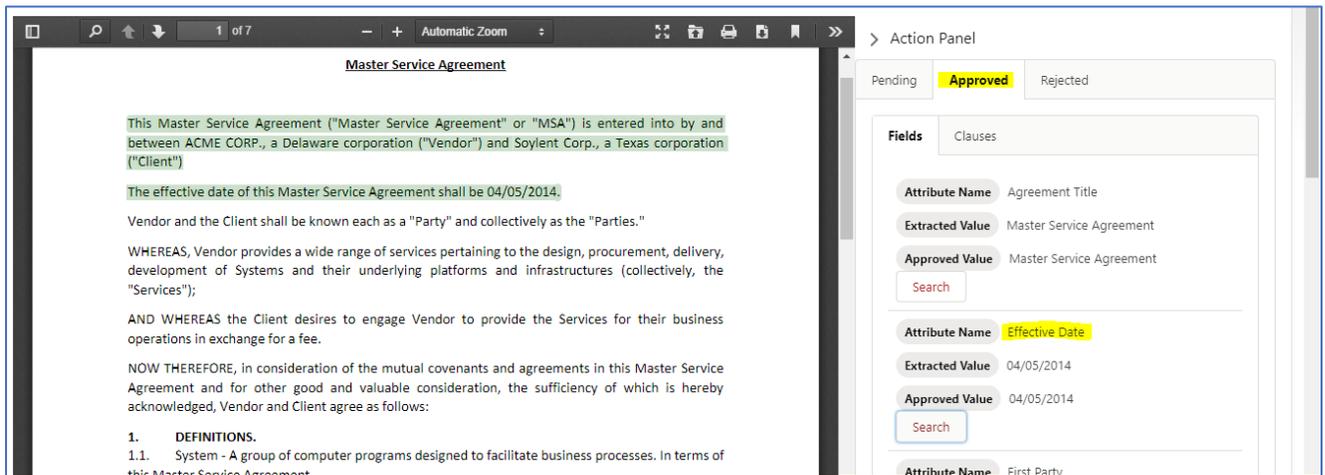
Once a clause is approved, it is moved from the Pending to the Approved tab. Refer to the screenshot below.



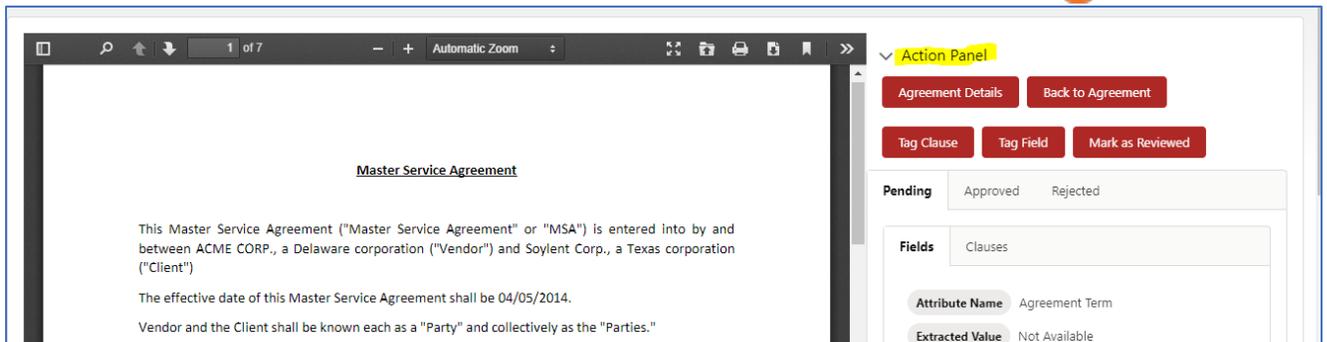
C. Updating Attribute Name data in Field/Clause

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



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’.

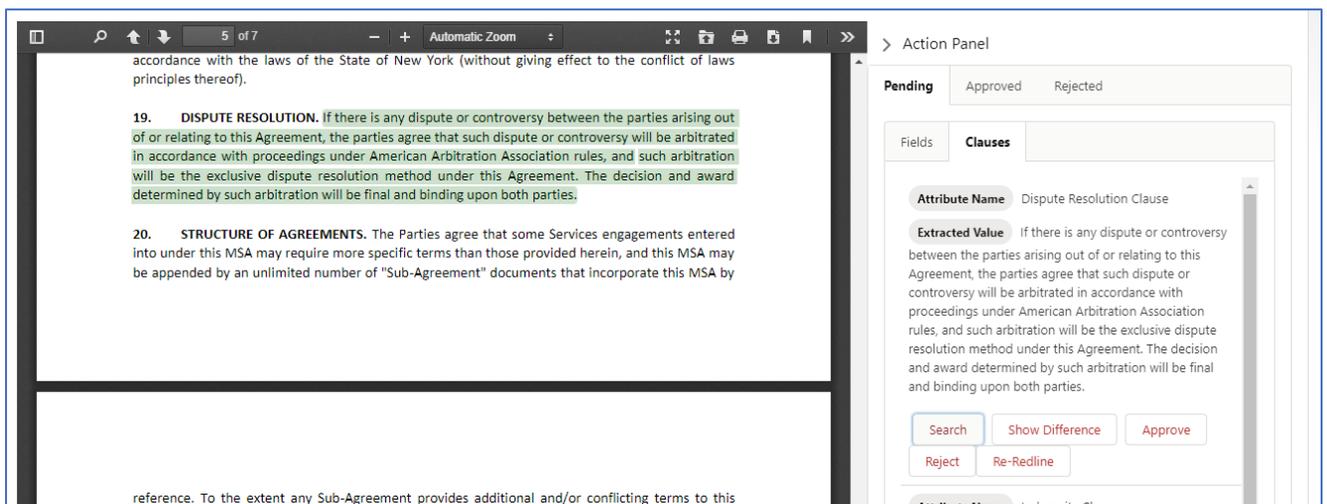
Opportunity	Legal Owner
Quote	Effective Date 4/5/2014
Counter Party	Expiration Date 4/4/2014
First Party ACME CORP.	Record Type MSA

D. Re-Redlining of Clause

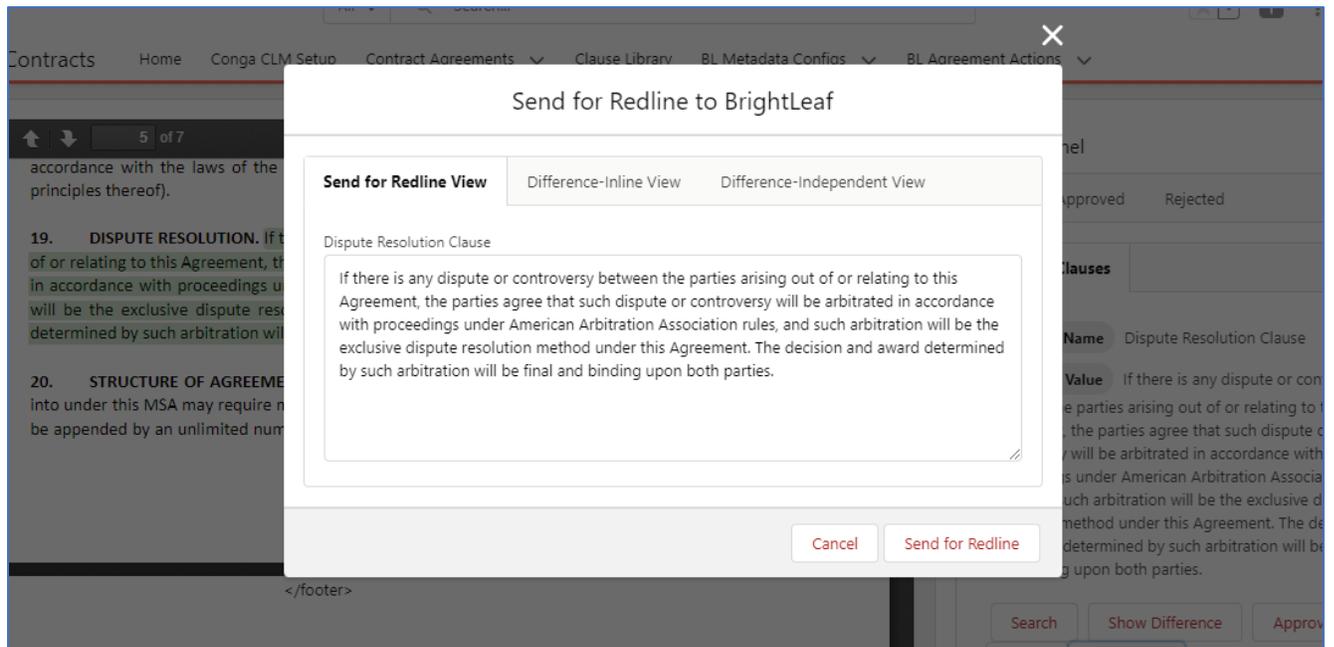
Re-Redlining of Clause helps user to correct the clause text if the system did not extract properly. This feature takes the modified text input by user and updates the clause with flag (Redlined). Refer to the screenshot below. Following are the steps:

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)

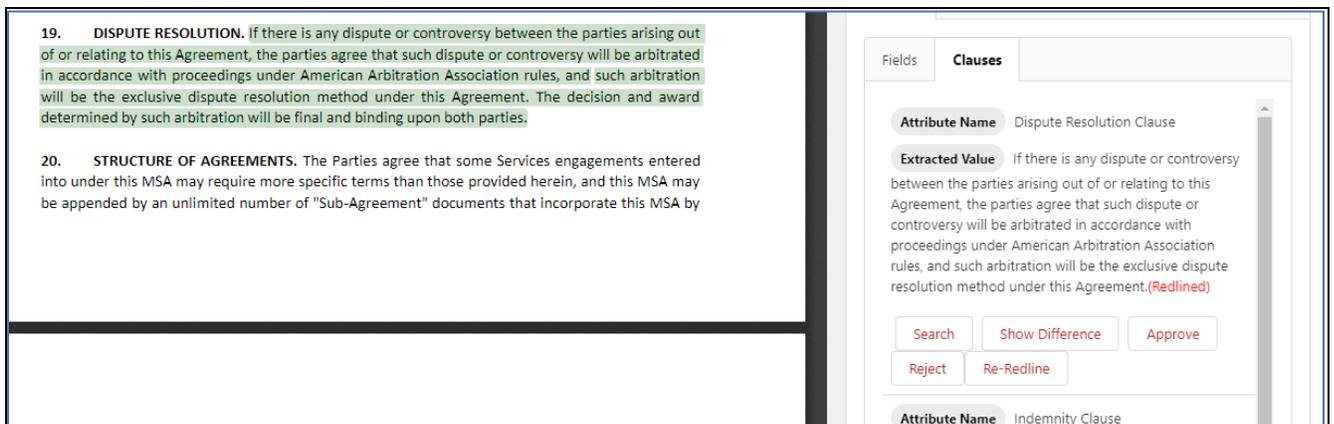
Screen 1 – Before Re-Redline



Screen 2 – Redline Popup to modify text



Screen 3 – Updated clause with Redlined flag



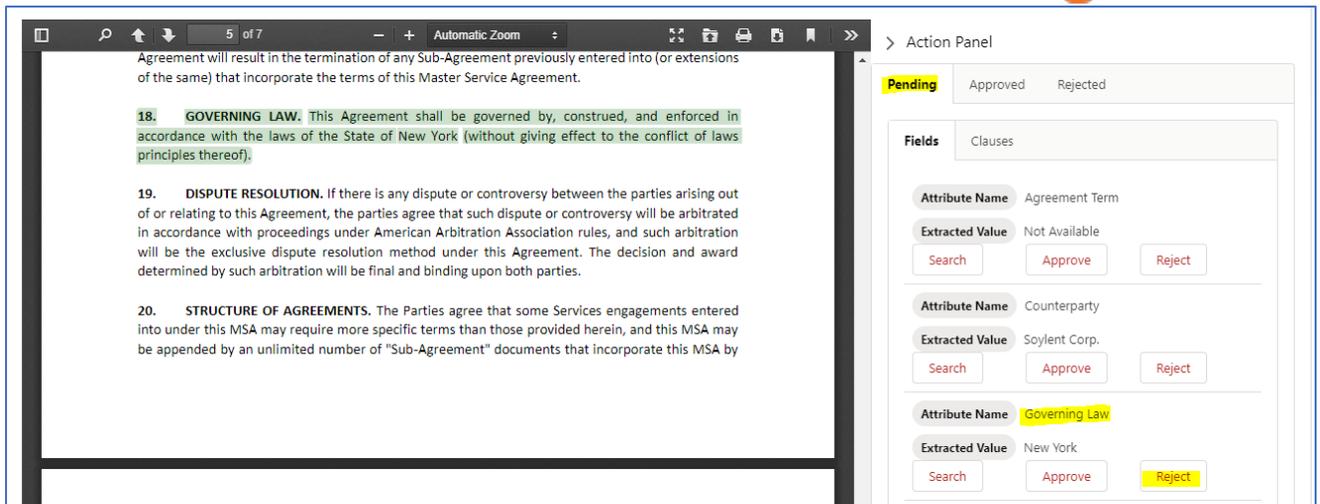
E. Reject Attribute Name

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.

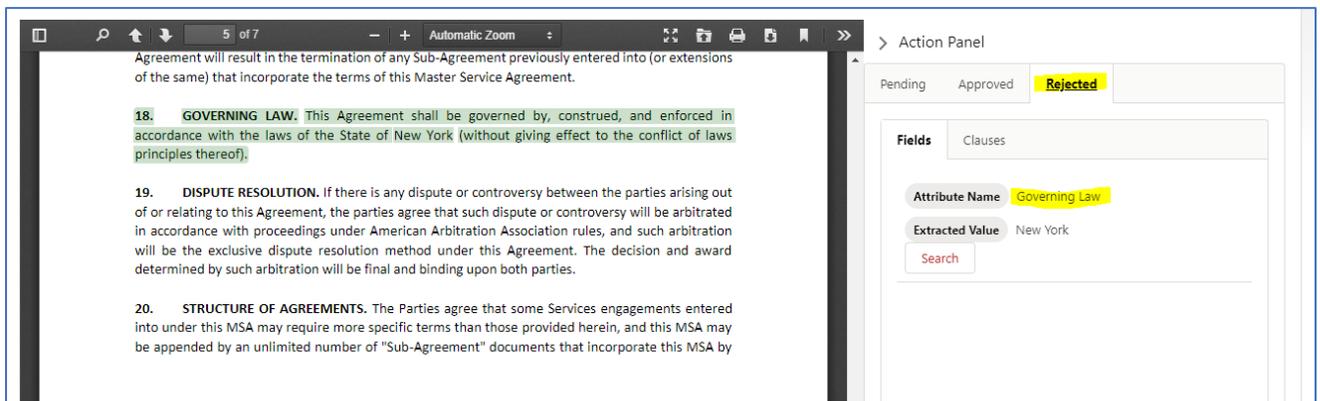
Screen 1 – Attribute 'Governing Law' in Pending tab

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Click on Reject button

Screen 2 – Attribute ‘Governing Law’ moved to the Rejected tab

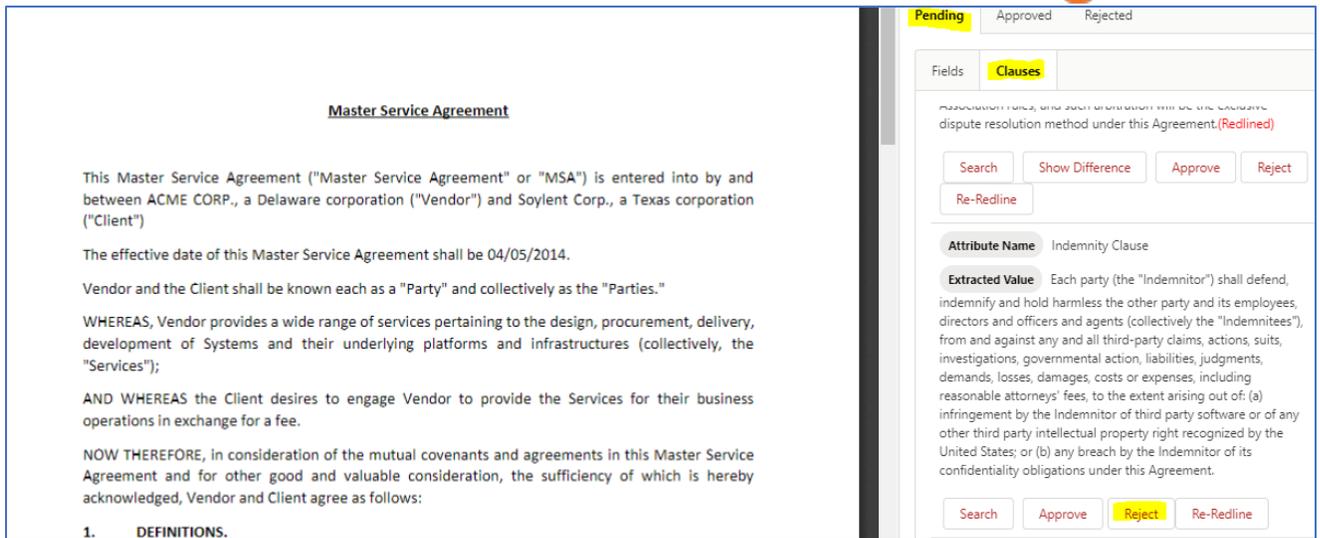


F. Reject Clause

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



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.

Pending Approved Rejected

Fields **Clauses**

Associated Fields, and their relationship with the extracted dispute resolution method under this Agreement. (Redlined)

Search Show Difference Approve Reject

Re-Redline

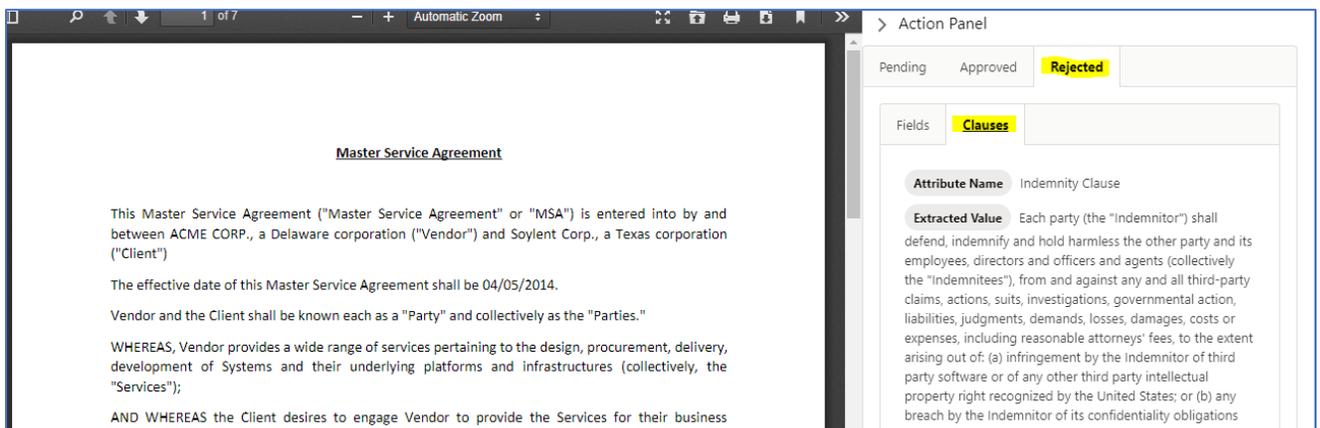
Attribute Name Indemnity Clause

Extracted Value Each party (the "Indemnitor") shall defend, indemnify and hold harmless the other party and its employees, directors and officers and agents (collectively the "Indemnitees"), from and against any and all third-party claims, actions, suits, investigations, governmental action, liabilities, judgments, demands, losses, damages, costs or expenses, including reasonable attorneys' fees, to the extent arising out of: (a) infringement by the Indemnitor of third party software or of any other third party intellectual property right recognized by the United States; or (b) any breach by the Indemnitor of its confidentiality obligations under this Agreement.

Search Approve **Reject** Re-Redline

Click on Reject button

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



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

Pending Approved **Rejected**

Fields **Clauses**

Attribute Name Indemnity Clause

Extracted Value Each party (the "Indemnitor") shall defend, indemnify and hold harmless the other party and its employees, directors and officers and agents (collectively the "Indemnitees"), from and against any and all third-party claims, actions, suits, investigations, governmental action, liabilities, judgments, demands, losses, damages, costs or expenses, including reasonable attorneys' fees, to the extent arising out of: (a) infringement by the Indemnitor of third party software or of any other third party intellectual property right recognized by the United States; or (b) any breach by the Indemnitor of its confidentiality obligations

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

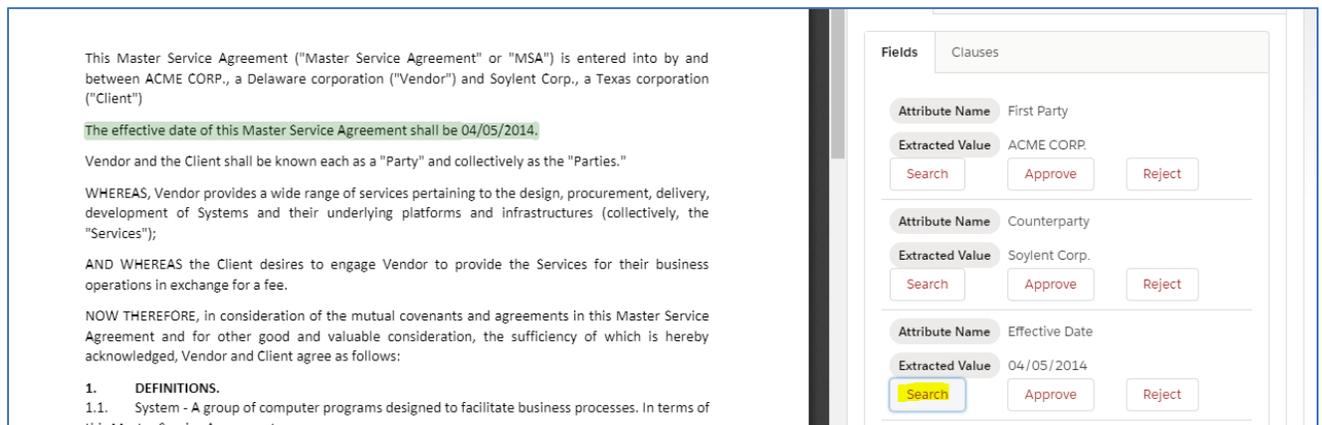
All the attributes (fields or clauses) wherever present, whether in Pending/Approved/Rejected, have search button to view the extracted results in the agreement.

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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.



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 this Master Service Agreement

Fields Clauses

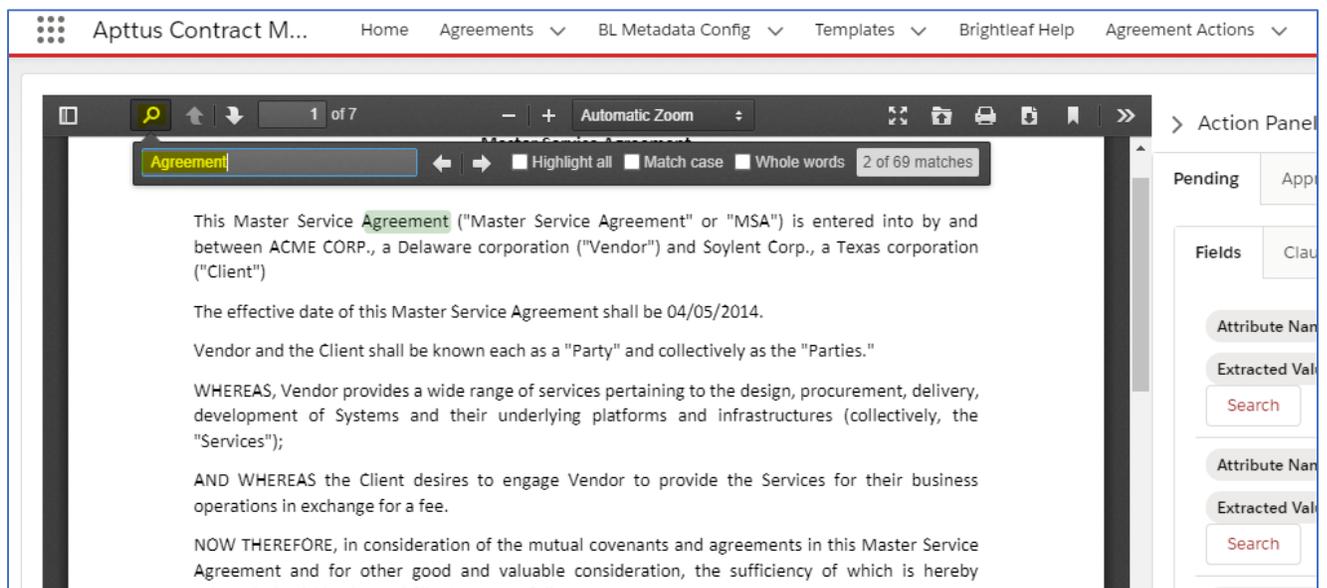
Attribute Name First Party
Extracted Value ACME CORP.
Search Approve Reject

Attribute Name Counterparty
Extracted Value Soylent Corp.
Search Approve Reject

Attribute Name Effective Date
Extracted Value 04/05/2014
Search Approve Reject

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.



Apttus Contract M... Home Agreements BL Metadata Config Templates Brightleaf Help Agreement Actions

1 of 7 Automatic Zoom

Agreement Highlight all Match case Whole words 2 of 69 matches

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")

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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:

Pending Approve

Fields Clauses

Attribute Name
Extracted Value
Search

Attribute Name
Extracted Value
Search

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.

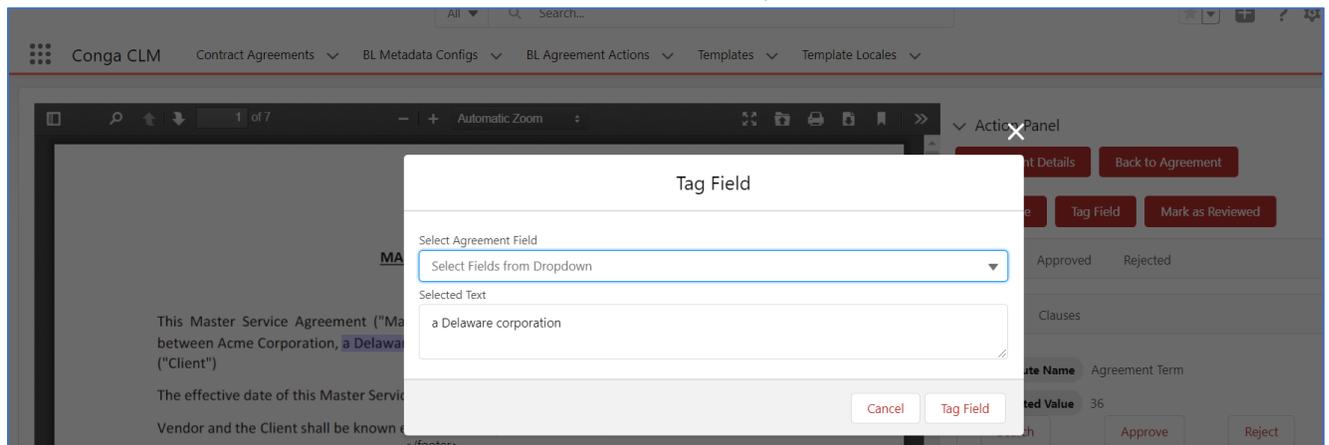
A. Tag a field

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.

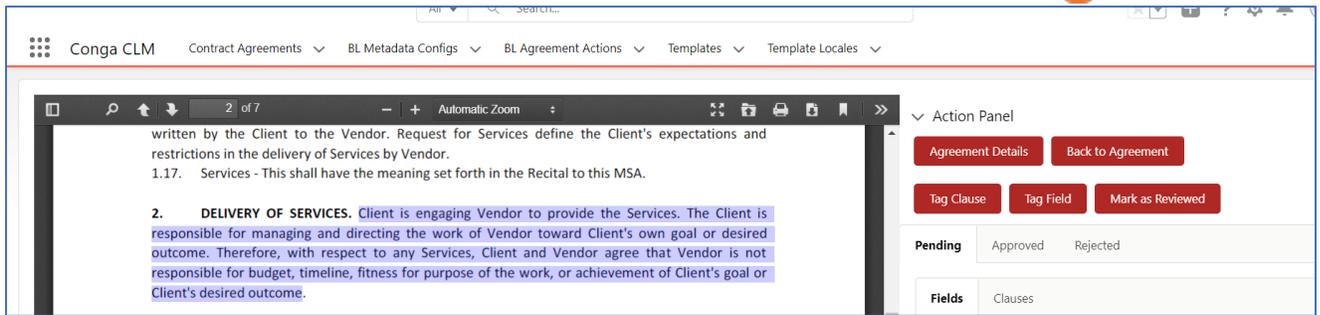


5. Click on Tag Field button.

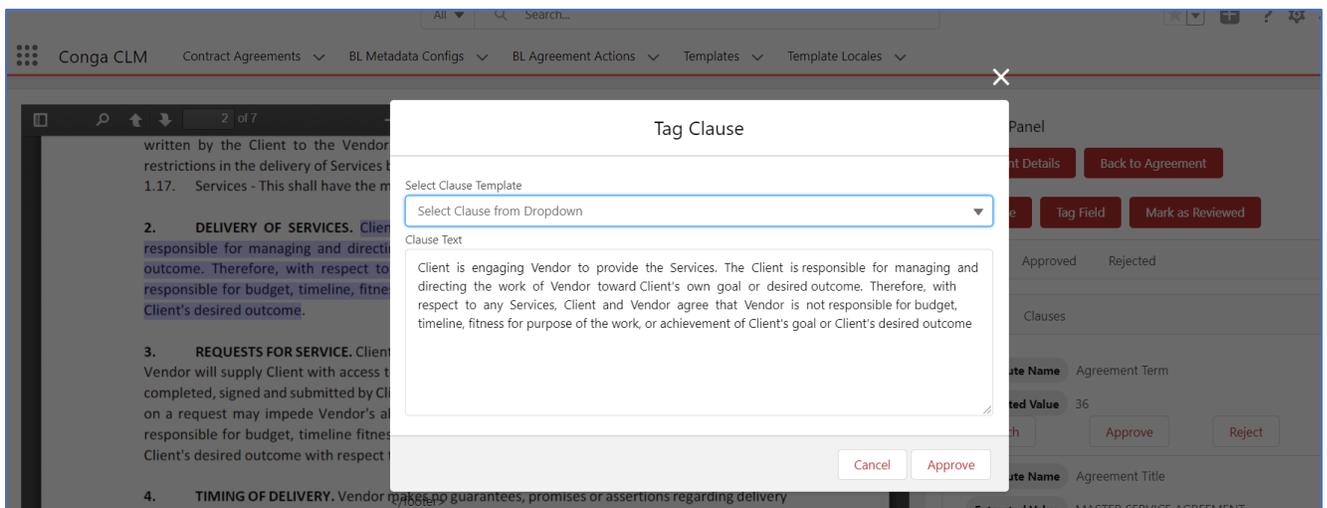
B. Tag a clause

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.



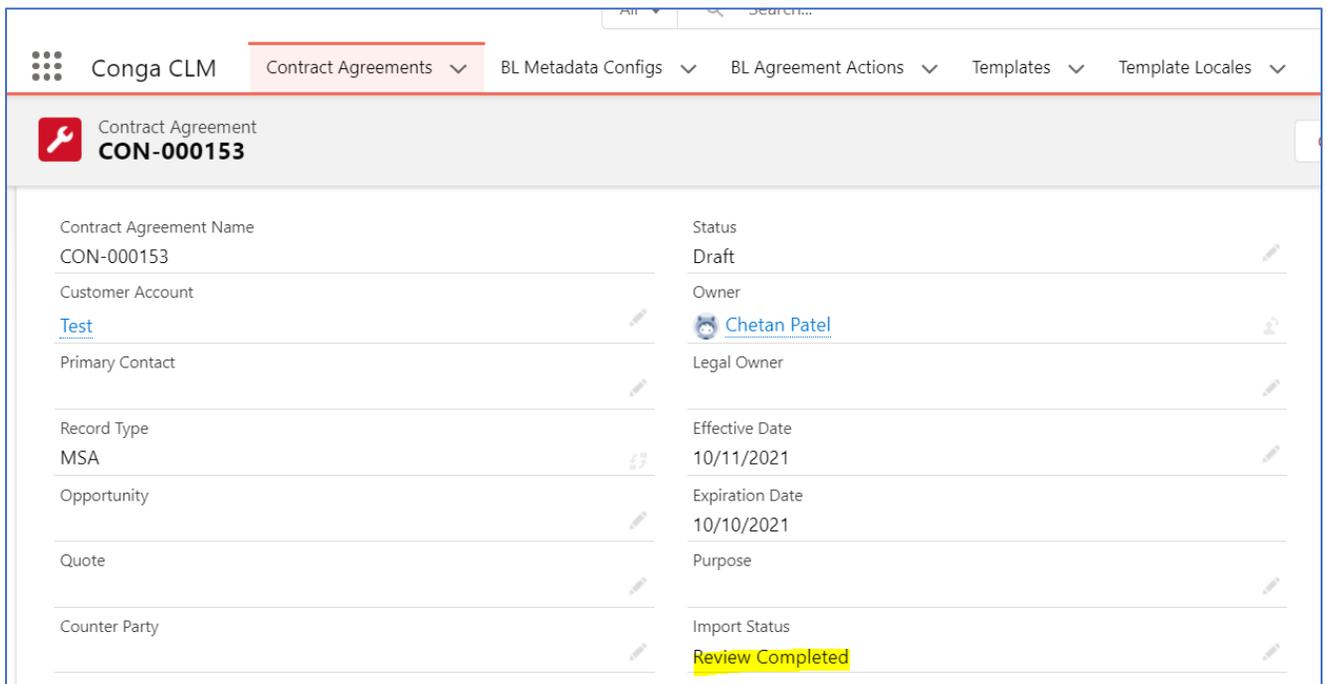
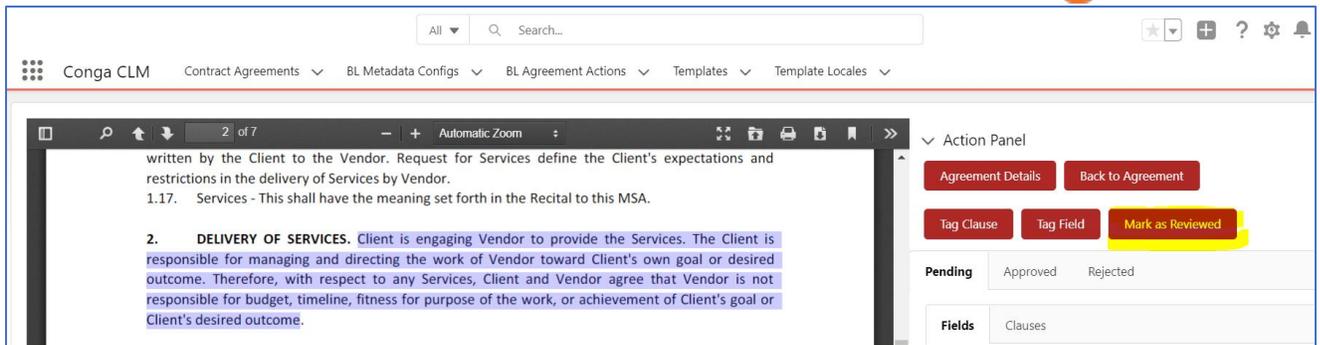
5. Click on Tag Clause button.

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.

Contract Agreement **CON-000153**

Related Details

Managed Clauses (0) [Contract Agreement Managed Clauses](#)

BL Logs (4) [New](#)

Log No
L-0012
L-0013
L-0014
L-0015

[View All](#)

BL Extractions (6+) [New](#)

Extraction No
EX-00000
EX-00001

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

Conga CLM Contract Agreements ▾ BL Metadata Configs ▾ BL Agreement Actions ▾ Templates ▾ Template Locales ▾

Contract Agreement
CON-000153

L-0012	▾
L-0013	▾
L-0014	▾
L-0015	▾

[View All](#)

BL Extractions (6+) New

Extraction No	
EX-00000	▾
EX-00001	▾
EX-00002	▾
EX-00003	▾
EX-00004	▾
EX-00005	▾

[View All](#)

3. Click on any attribute to view its details.

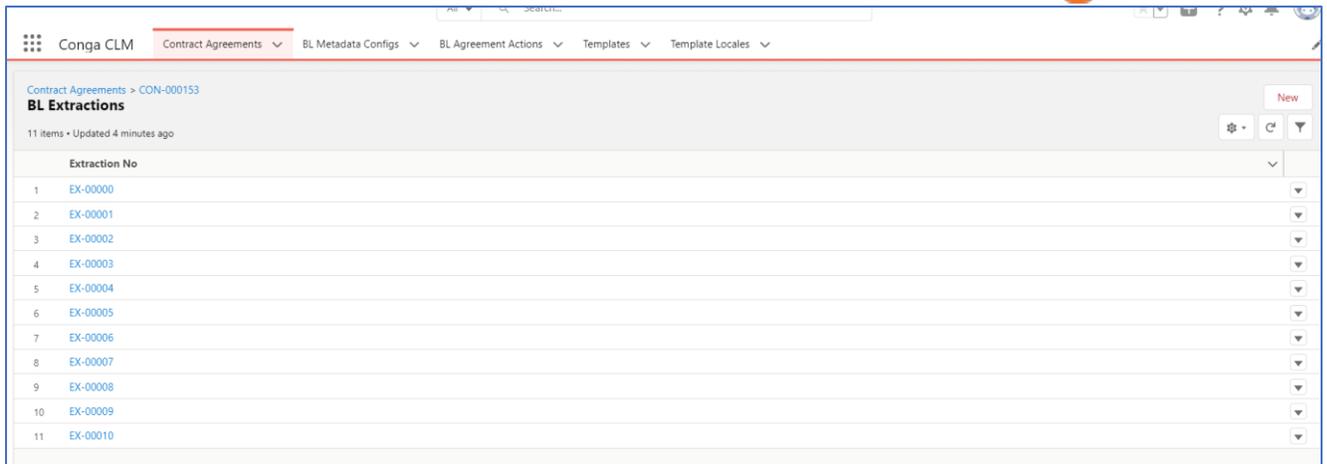
B. Related Tab [BL Extractions] – View all extracted clauses

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.

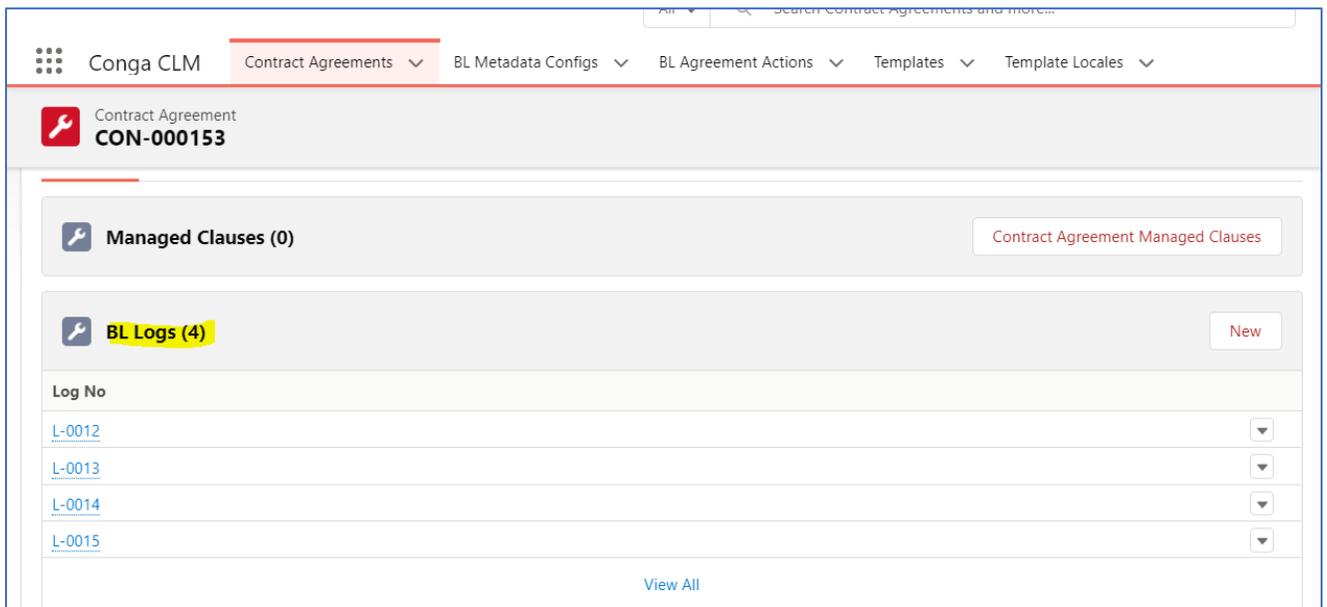


Extraction No	Extraction ID
1	EX-00000
2	EX-00001
3	EX-00002
4	EX-00003
5	EX-00004
6	EX-00005
7	EX-00006
8	EX-00007
9	EX-00008
10	EX-00009
11	EX-00010

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.



Log No
L-0012
L-0013
L-0014
L-0015

D. View Files

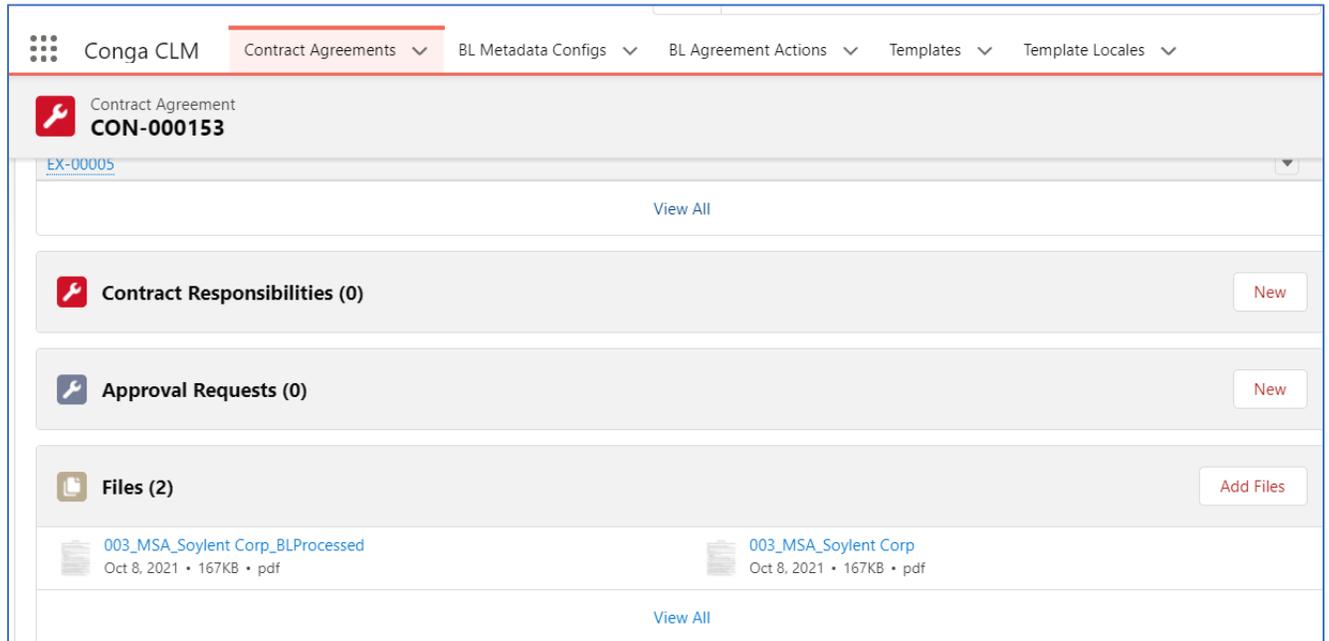
View Files under the Related Tab gives you the details of the documents being uploaded as part of that agreement.

Following are the steps:

1. Click on Related tab on Agreement Details page.

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2. Go to 'Files' section. It shows the details of the documents attached to uploaded/imported agreement.



The screenshot displays the Conga CLM interface for a contract agreement. At the top, the navigation bar includes 'Conga CLM', 'Contract Agreements', 'BL Metadata Configs', 'BL Agreement Actions', 'Templates', and 'Template Locales'. The main content area shows the contract details for 'CON-000153' with a sub-section 'EX-00005'. Below this, there are three sections: 'Contract Responsibilities (0)' with a 'New' button, 'Approval Requests (0)' with a 'New' button, and 'Files (2)' with an 'Add Files' button. The 'Files' section lists two PDF documents: '003_MSA_Soylent Corp_BLPprocessed' and '003_MSA_Soylent Corp', both dated Oct 8, 2021, and 167KB in size. A 'View All' link is present at the bottom of the files section.

Brightleaf for Salesforce Support

Reach out to Brightleaf for Salesforce Support for Salesforce-specific questions. For example, questions about your package Brightleaf with anything outlined in our Help articles.

Brightleaf for Salesforce Support can be reached by email at tpp_conga_support@brightleaf.com.