Salesforce Integration

Configuration Guide – V2

Your Contracts. Evolved.

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Introduction:

IntelAgree recognizes the importance of delivering a quick and adaptable integration solution to its Salesforce users. To ensure a highly effective and efficient approach, we have developed a comprehensive managed package, now accessible on the Salesforce AppExchange. This document outlines the features of an agile Lightning application, specifically designed to empower companies leveraging both Salesforce and IntelAgree. With this application, users can effortlessly create objects and access IntelAgree documents within the Salesforce environment.

The IntelAgree/Salesforce integration is accessible in the following ways:

1. Introducing a Lightning component designed to display all contracts associated with a Party (Account in Salesforce). This component empowers users to access IntelAgree contract information seamlessly from any Salesforce object linked to the account object.
2. The “Create Contract” action button enables Salesforce users to initiate contract creation directly within Salesforce. This component is intelligently configured to enforce permissions, ensuring that users can only perform actions permitted by their roles and responsibilities in IntelAgree.
3. The “Contract Details” action button allows users to effortlessly delve into comprehensive contract details within IntelAgree. This component offers a user-friendly interface for viewing intricate contract information all from within Salesforce.

This document serves as a comprehensive guide for administrators, navigating them through the implementation process, which is segmented into the following parts:

- Installation of The Application
- IntelAgree API Settings Configuration
- Configuring IntelAgree Mapping Template
- Adding Integration Components to the Page
- Attribute Manager Setup
- Configuring Integration Action Buttons

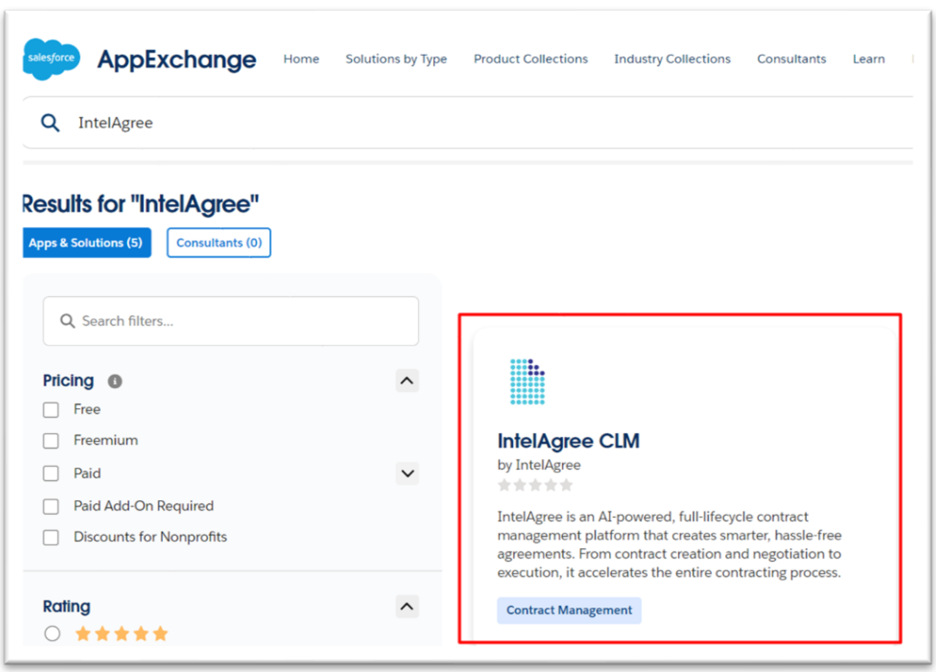
Installing the IntelAgree Salesforce Integration:

This section furnishes detailed step-by-step instructions for installing the application. The Salesforce application is conveniently available for installation via the App Exchange. Utilizing the App Exchange ensures access to the latest and most up-to-date version of the IntelAgree Salesforce Integration. Furthermore, for updating the application to the latest version, the App Exchange serves as the primary platform.

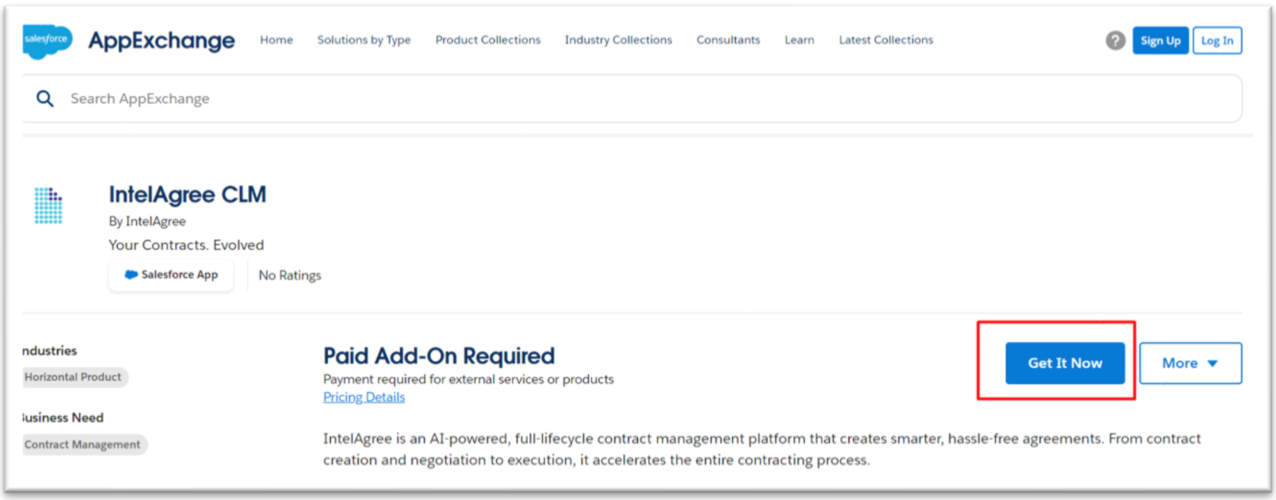
Getting the App from the App Exchange

To get the app from the app exchange:

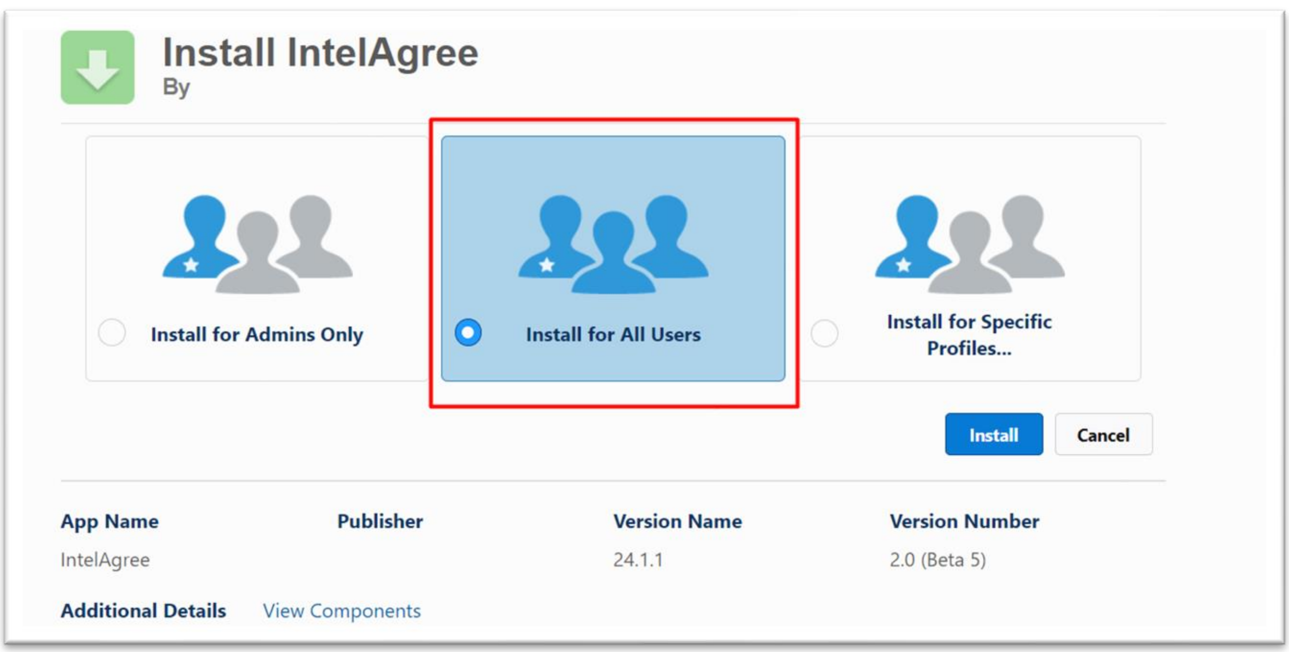
1. Navigate to https://appexchange.salesforce.com/
2. Search for IntelAgree.
3. Click “IntelAgree CLM”.



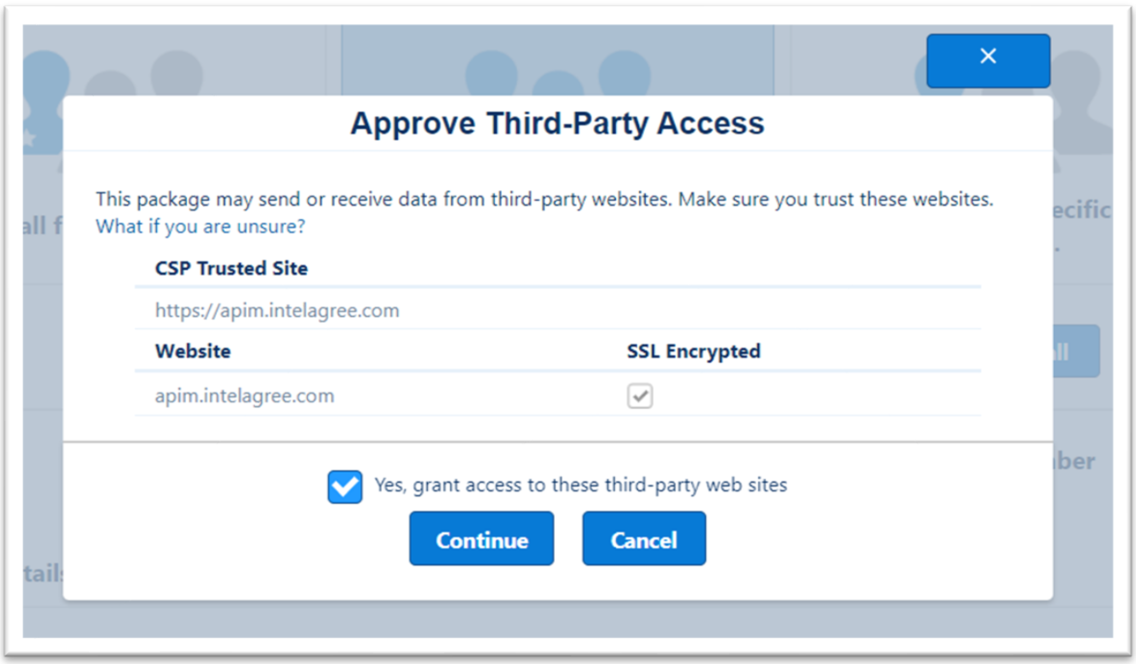
4. Click “Get it Now.”



5. When prompted, select “Install for All Users.”



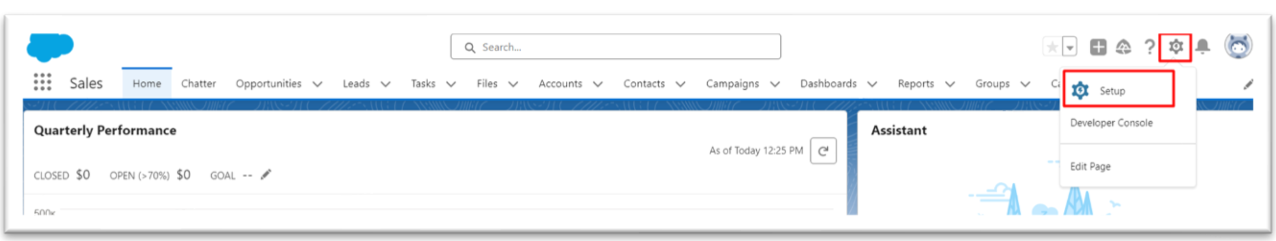
6. Check the box to allow access to third-party websites, then click “Continue.”



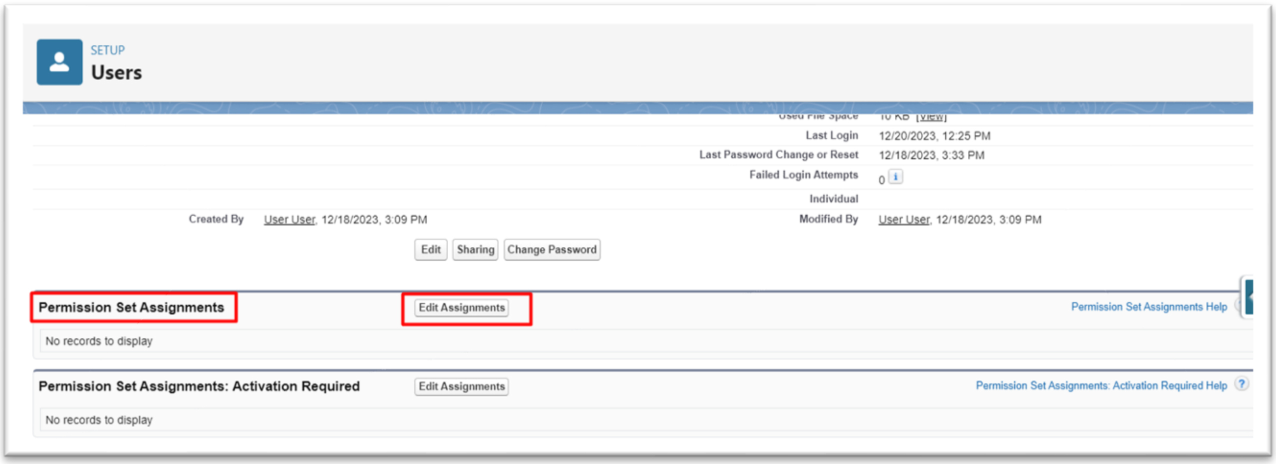
Assign IntelAgree Application Admin Permission Set:

Once the IntelAgree application has been successfully installed, the next crucial step is to grant the system administrator the "IntelAgree Application Admin" permission set. To accomplish this, follow the step-by-step instructions below:

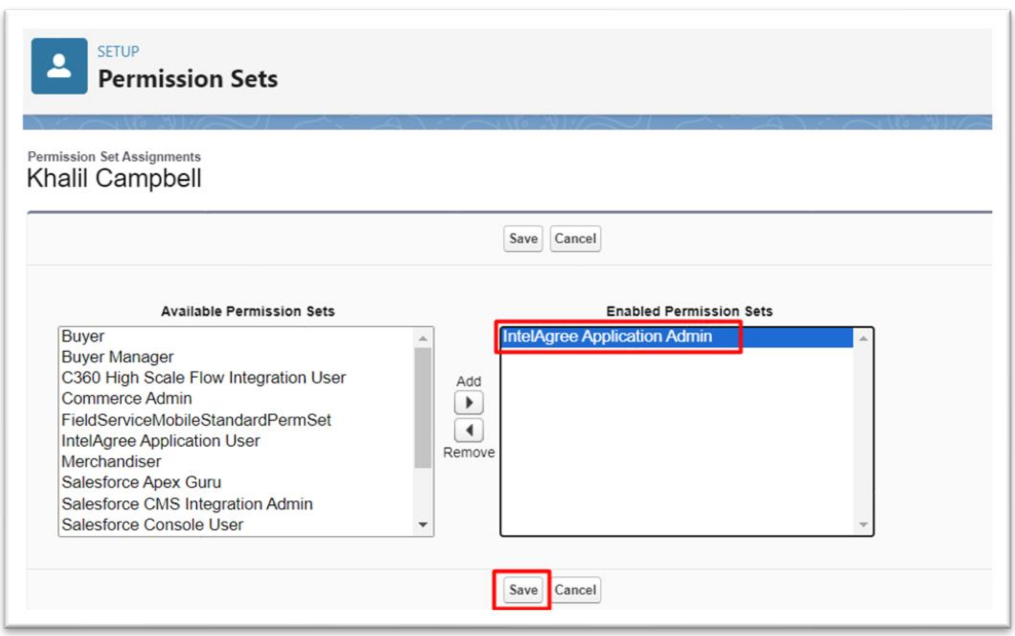
1. Navigate to Setup.



2. From the left navigation pane, locate the “Users” drop-down section, then click “Users.”
3. Select the user you wish to add the IntelAgree Application Admin permission set to.
4. Within that user’s setup, scroll down to the section “Permission Set assignments” then click on the “Edit Assignments” button.



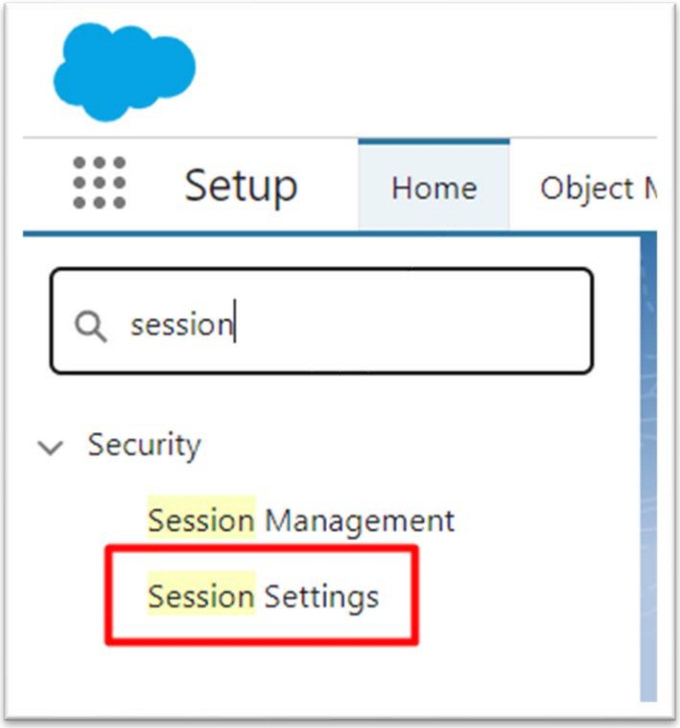
5. Locate the “IntelAgree Application Admin” permission set from the “Available Permission Sets” list and add it to the “Enabled Permission Sets" list, then click “Save.”



Enabling Lightning Web Security for Lightning Web Components:

To ensure that all Lightning Web Components are working as intended, the Lightning Wb Security feature must be enabled. Follow the steps below:

1. Navigate to Session Settings:
   a. Click on the setup COG wheel at the top right of the page and then click on "Setup."
   b. From the left navigation pane, under "Security", click on "Session Settings."

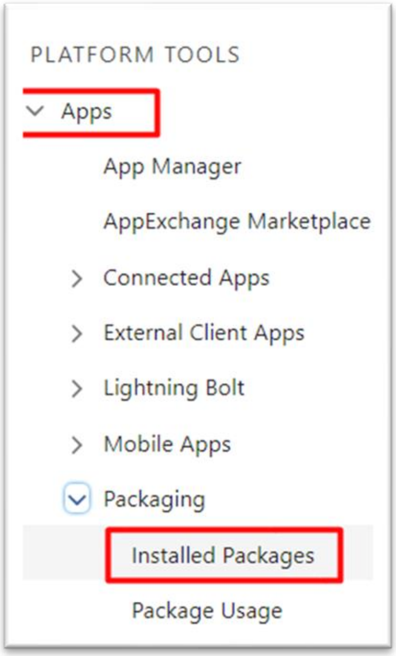


2. Enable Lightning Web Security:
   a. In Session Settings, find the section "Lightning Web Security" and then click on the checkbox labeled – "Use Lightning Web Security for Lightning web components and Aura components."

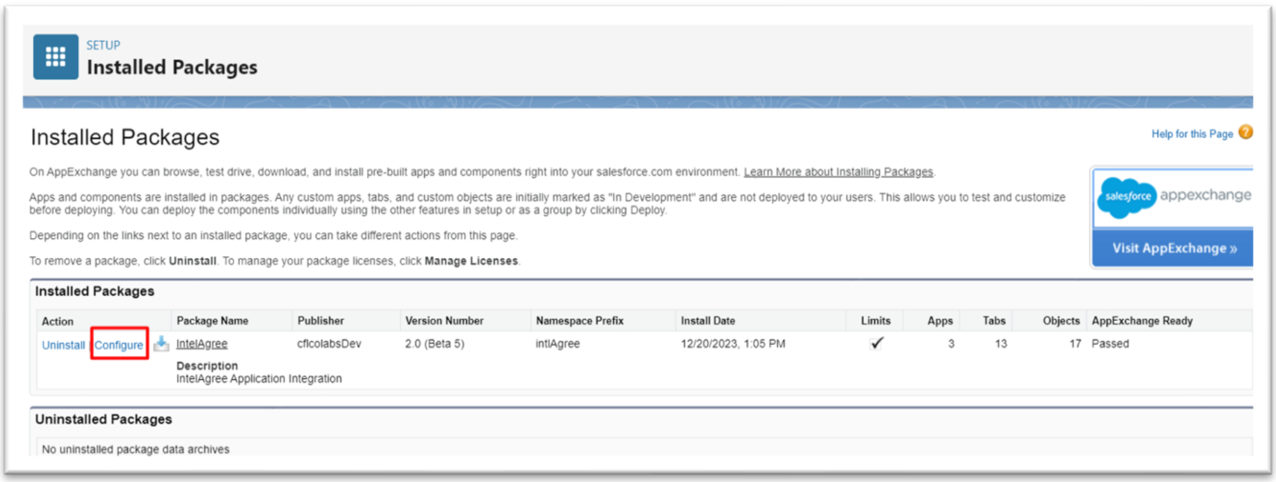
Configure API Settings:

Before any information can begin to flow between IntelAgree to Salesforce, a connection must first be established. Follow the steps below to ensure a successful connection:

1. Navigate to Setup.
2. From the left navigation menu, under “Apps”, expand the “Packaging” drop-down and select “Installed Packages.”



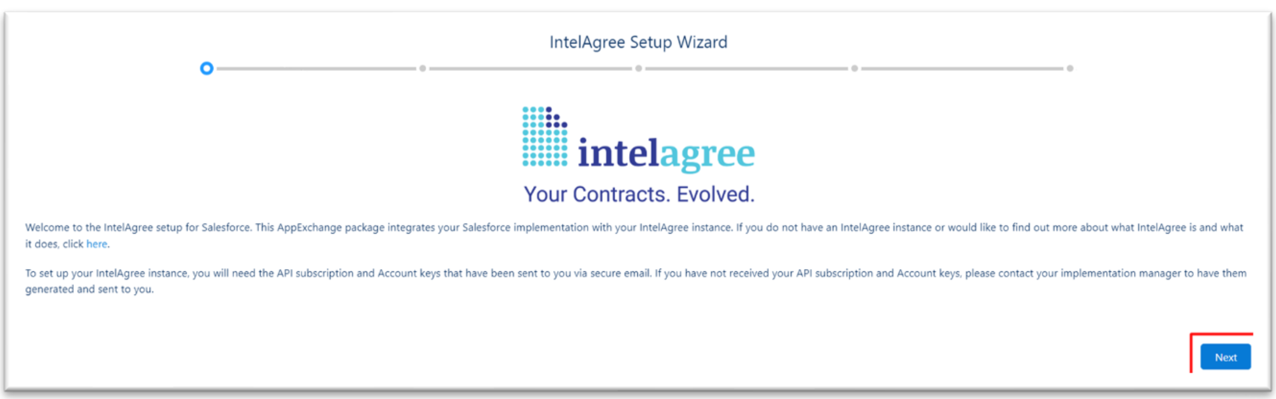
3. Locate the IntelAgree package then click “Configure” under the “Action” column. This will redirect the user to the “IntelAgree API Settings page.”



API Settings - First Time Configuration:

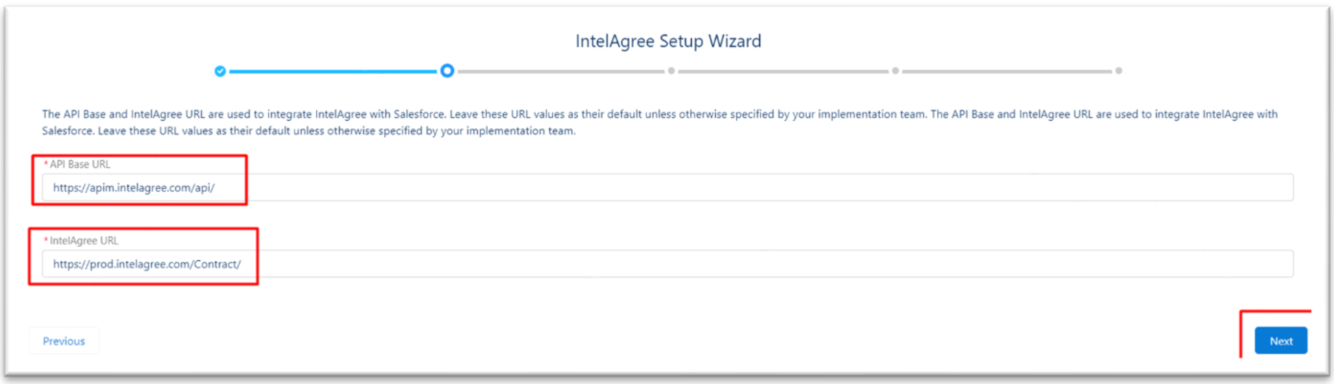
For an initial setup of IntelAgree API settings, a wizard will guide you through the configuration process. Ensure a smooth configuration by following these instructions:

1. **Initiate IntelAgree Setup Wizard**:
   a. Begin by clicking "Next" in the "IntelAgree Setup Wizard."

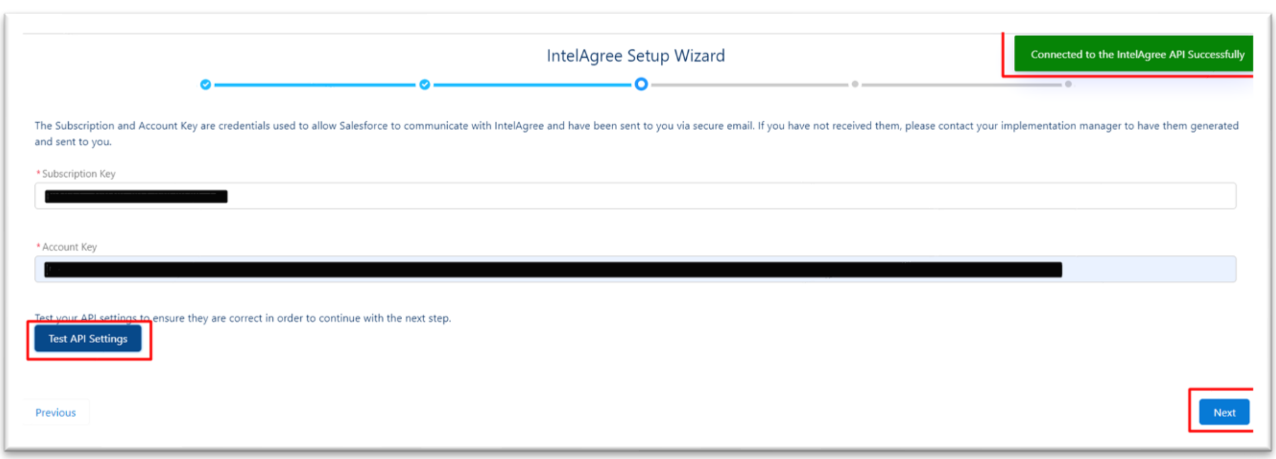


2. **Provide/Confirm API Base URL and IntelAgree URL**:
   a. On the next page, you'll be prompted to provide or confirm the "API Base URL" and "IntelAgree URL." Click "Next" after ensuring accuracy.

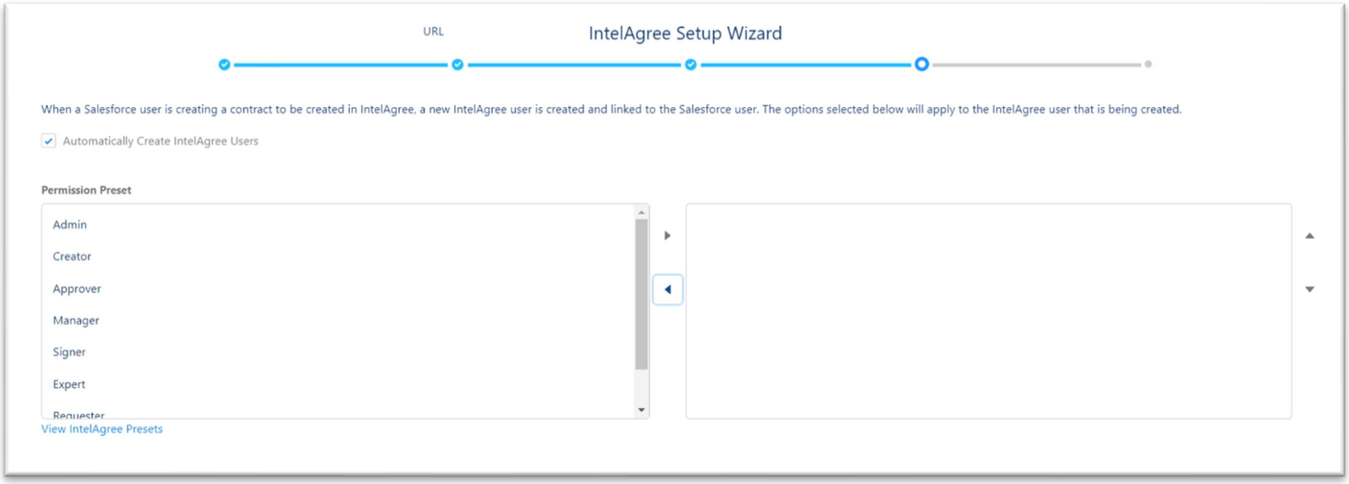
b. The API Base and IntelAgree URL are used to integrate IntelAgree with Salesforce. Leave these URL values as their default unless otherwise specified by your implementation team.



3. **Enter Subscription Key and Account Key**:
    a. On the next page, enter your “Subscription Key” and “Account Key”.
    b. These credentials facilitate communication between Salesforce and IntelAgree and are sent securely via email. If you haven't received them, contact your implementation manager for assistance.
4. **Test API Settings**:
    a. Click the "Test API Settings" button to verify the accuracy of the provided information and establish a successful connection.
    b. Once a successful connection has been made, a “Next” button will appear on the bottom right of the page. Click this button to continue through the wizard.



5. **Configure User Creation and Permissions**:
    a. The following page allows you to configure whether IntelAgree users are automatically created and grants admin control over permissions for new users.
        i. If you prefer not to automatically create IntelAgree users, uncheck the "Automatically Create IntelAgree Users" checkbox (enabled by default).
        ii. If enabled, at least one permission is required to proceed with the wizard.



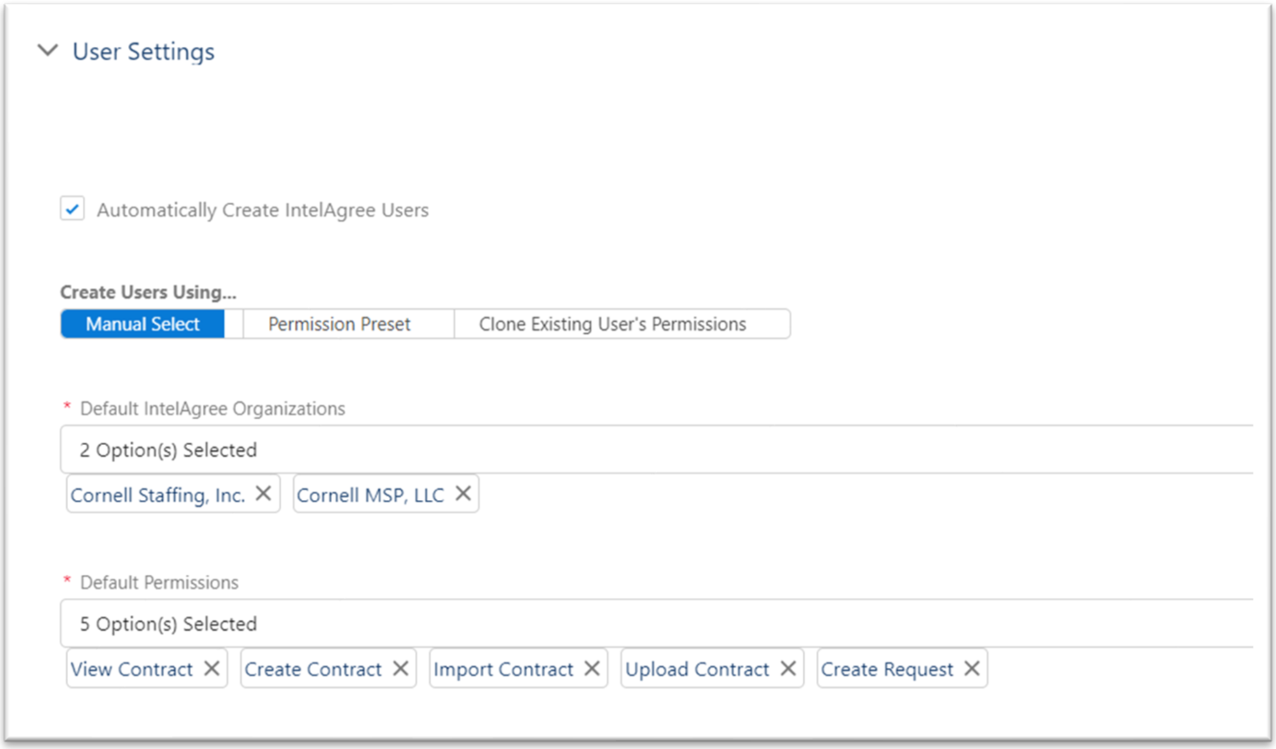
6. **Finalize Wizard Configuration**:
    a. The final page presents two optional configuration choices. Click "Finish" to complete the wizard.
        i. **Bind Existing Salesforce Account to Existing IntelAgree Party**: Establish a Business Key connection between an IntelAgree Party and Salesforce Account if a matching Party exists.
        ii. **Allow Salesforce Records to be Bound to Existing IntelAgree Contracts**: Permit users to bind a contract in IntelAgree without an existing Salesforce Business Key connection to a Salesforce Record.

API Settings Page – Modifying Existing Configuration

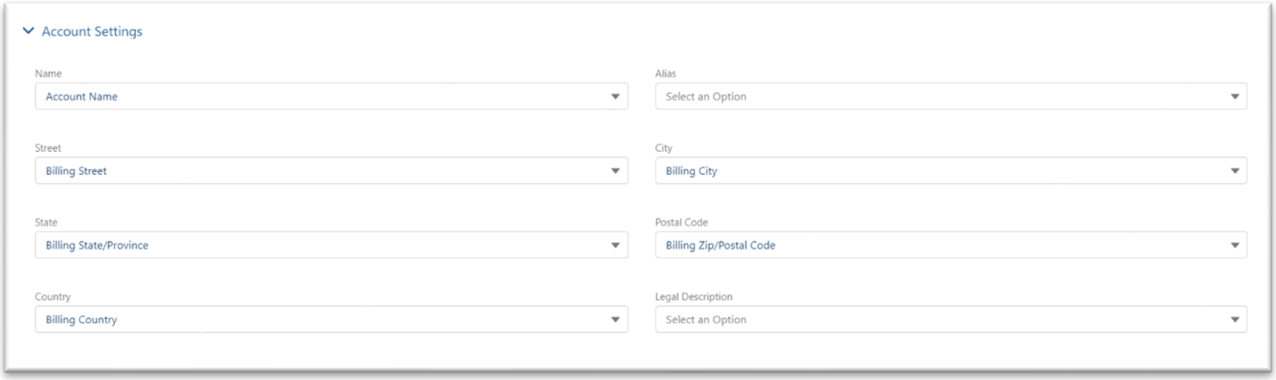
Following the initial wizard configuration, accessing the API settings page provides Salesforce Admins with a comprehensive view of various integration-related configurations. Below is a description of the available configuration options for administrators on the API settings page:

- **API Settings**: Allows the user to view and modify critical settings, including API Base URL, IntelAgree URL, Subscription Key, and Account Key. Additionally, provides the functionality to retest values to ensure a sustained connection.

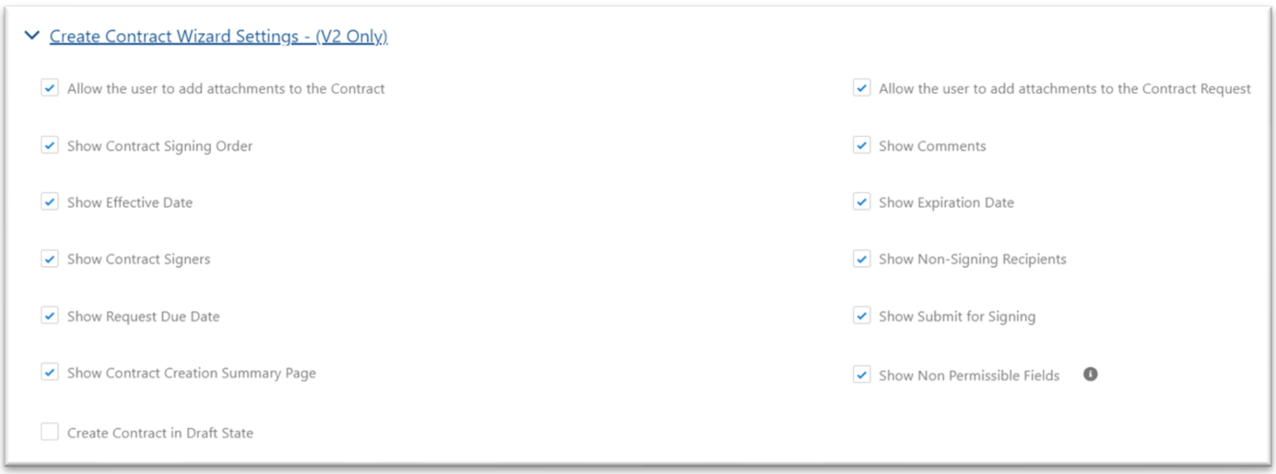
- **User Settings**: Empowers Salesforce Admins to manage the automatic creation of new IntelAgree users and customize user creation preferences. Initially mirrors the values selected in the API Wizard but can be modified at any time.



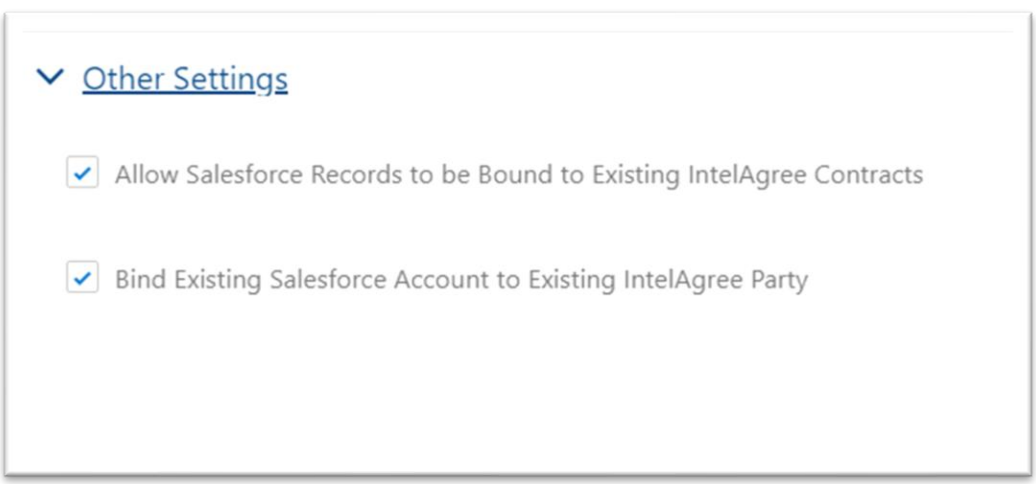
- **Account Settings**: Enables Salesforce Admins to map Salesforce fields to corresponding fields on the IntelAgree Party.



- **Create Contract Wizard Settings (V2 Only)**: Allows Salesforce Admins to configure the visibility of optional fields during the contract configuration through the "Create Contract" action button. This customization provides flexibility to simplify or enhance the contract creation experience as desired.



- **Other Settings**: Offers the flexibility to configure whether users can bind existing IntelAgree contracts to a Salesforce record. Additionally, allows the binding of a Salesforce Account to an IntelAgree Party if a name match is identified on a Party lacking a Salesforce Business Key.



intelagree

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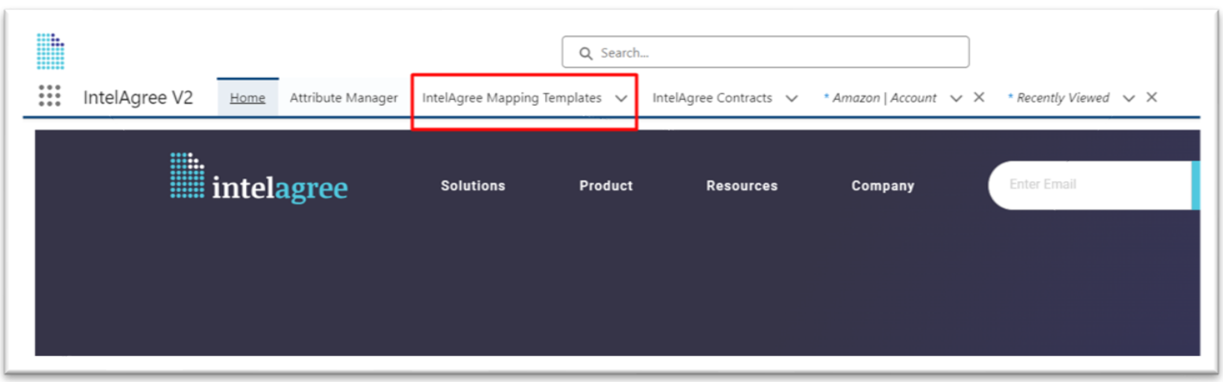
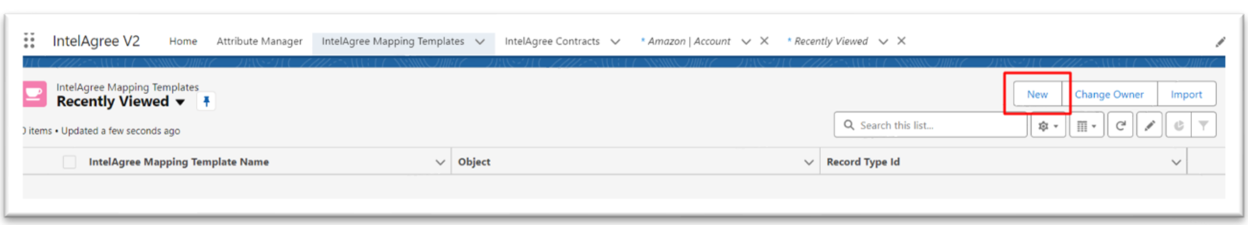
Configuring IntelAgree Mapping Templates:

The IntelAgree Mapping Template allows the Salesforce Admin to configure what contract fields will get mapped based on the Salesforce Record. To ensure a successful configuration of the IntelAgree Mapping Template, Salesforce Admins can follow the detailed instructions provided below:

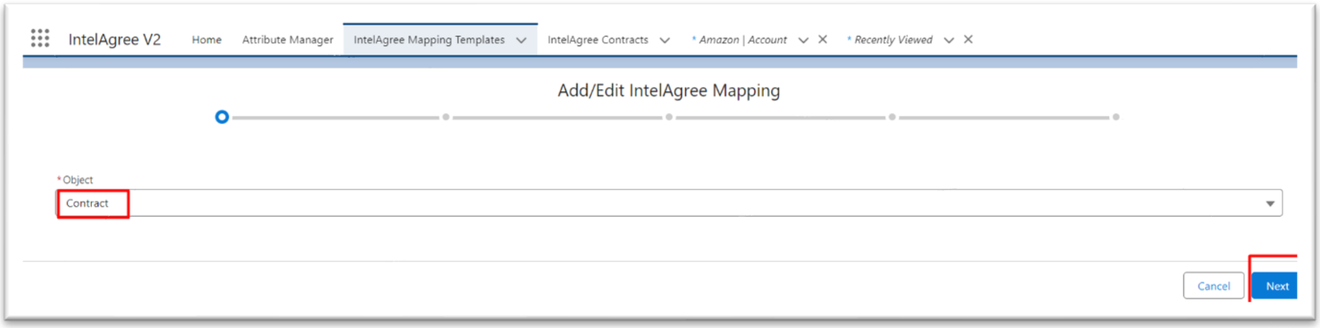
1. **Access IntelAgree V2 Setup:**
    a. Navigate to IntelAgree V2 Setup and click on the “IntelAgree Mapping Template” tab.



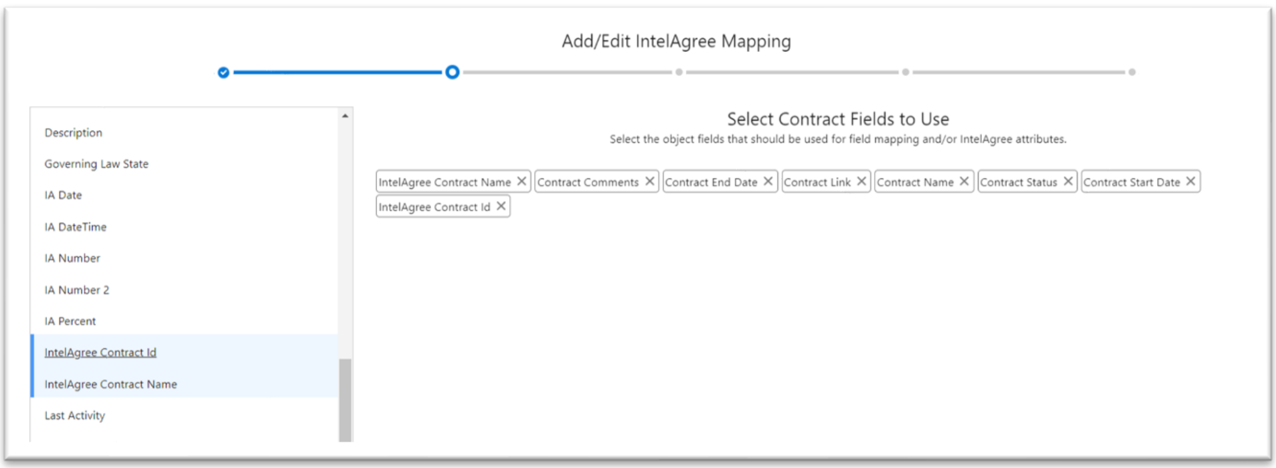
2. **Create a New Mapping Template**:
    a. Click the "New" button located at the top left of the page to initiate the creation of a new mapping template.



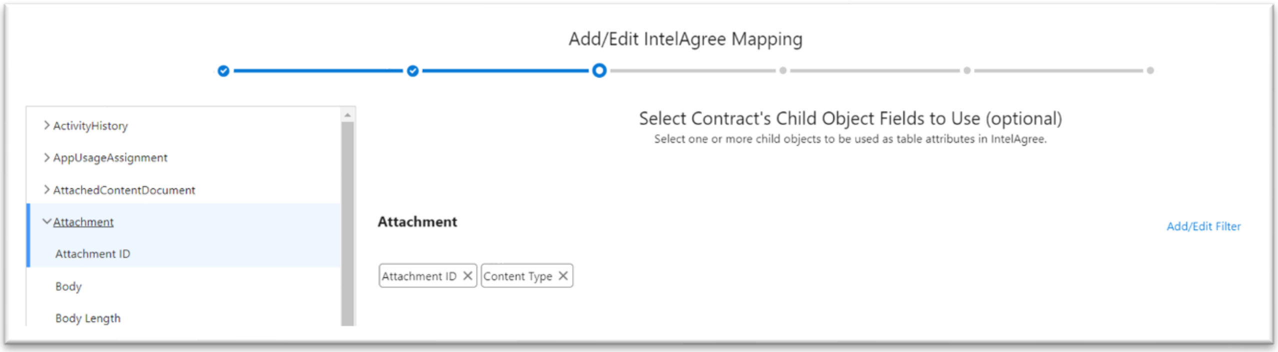
3. **Select Salesforce Object**:
    a. Choose the Salesforce object for which you want to create a mapping. Click "Next." (Example: "Contract" object, but any Salesforce object with a lookup to the Account can be used.



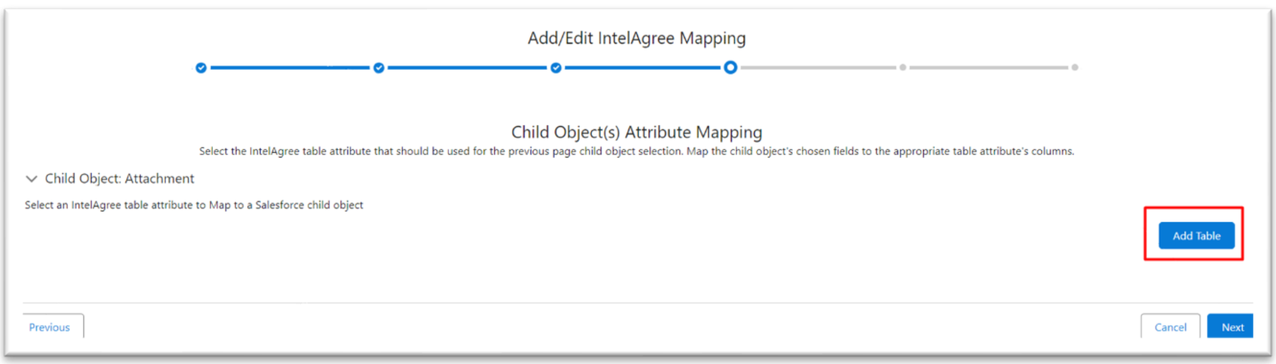
4. **Select Object Fields for Mapping**:
    a. Choose object fields for field mapping and/or IntelAgree attributes. Selected fields will appear in the center of the page. Click on a field to unselect or use the 'x' to remove it.



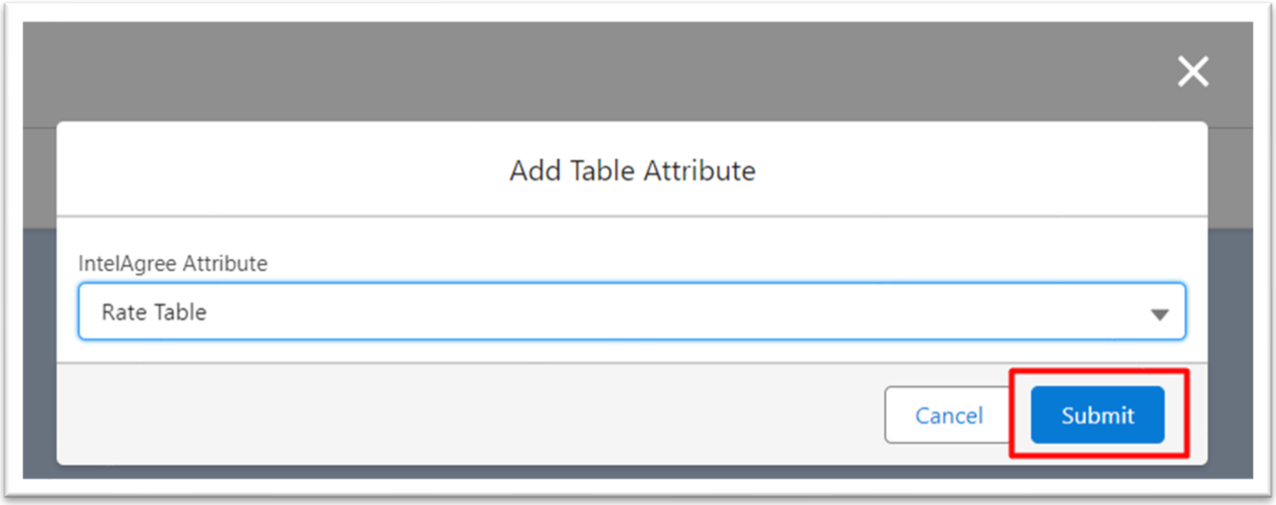
5. **Select Child Objects (Optional)**:
    a. Choose one or more child objects for table attributes in IntelAgree. Click "Next" to proceed.



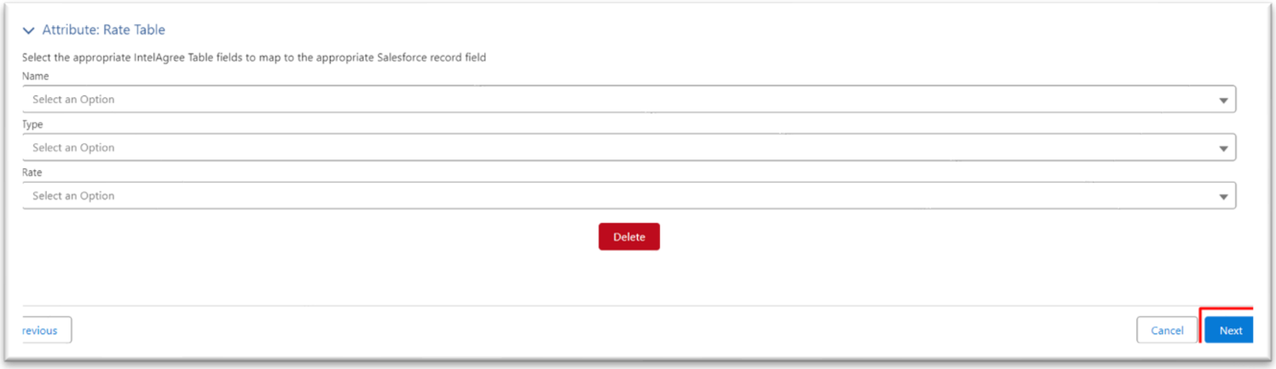
6. **Add Table and Map Fields**:
    a. Click "Add Table" to select the attribute table for the chosen child object. Map the child object's fields to the appropriate table attribute columns.



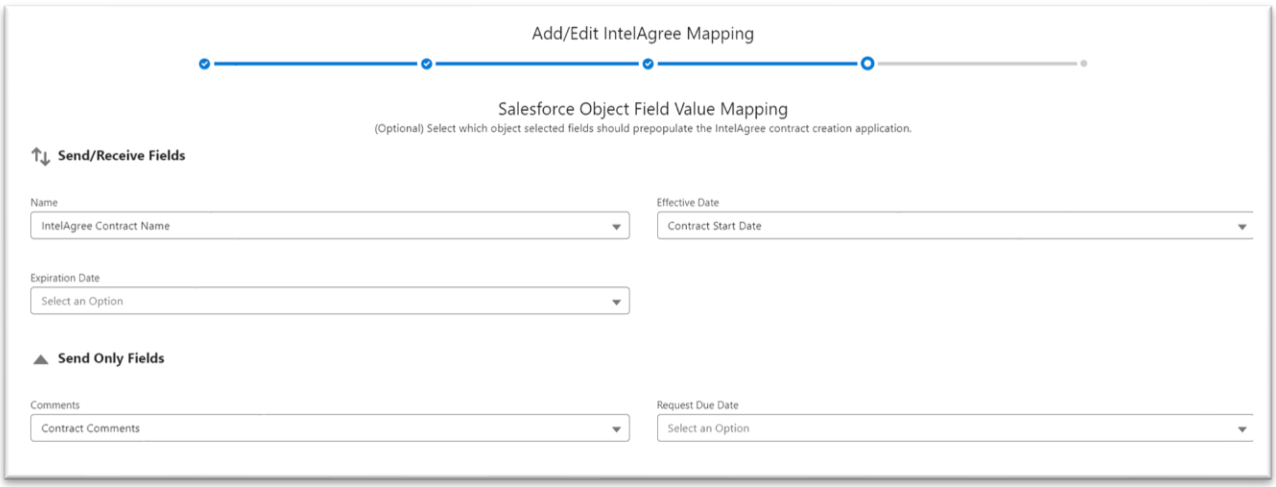
7. **Select IntelAgree Table Attribute:**
    a. Choose the IntelAgree table attribute for mapping to the Salesforce child object. Click "Submit." Only table attributes will appear in the drop-down selector.



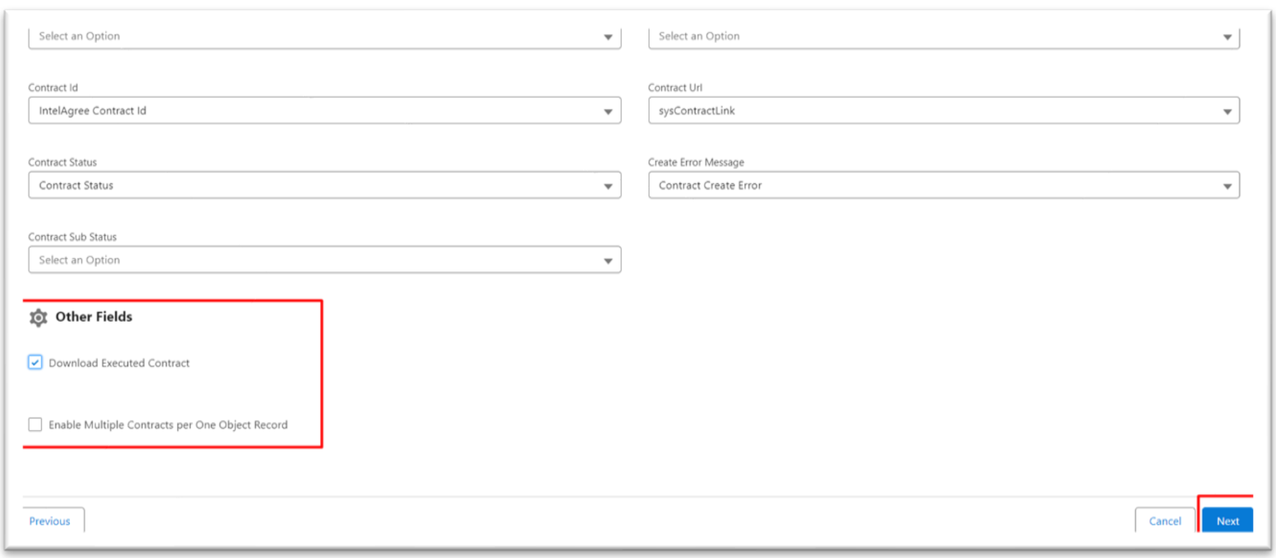
8. **Map IntelAgree Table Fields:**
    a. Choose the IntelAgree table fields to map to the corresponding Salesforce record field. Click "Next." Only the fields selected during the child object field selection will be available.



9. **Object Field Mapping**:
    a. Select which object fields should prepopulate the IntelAgree contract creation application.

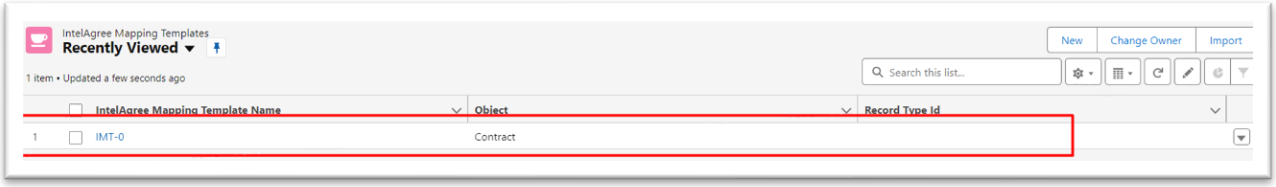


b. Additionally, configure options such as downloading a copy of the executed contract and allowing multiple contract records on a single Salesforce record.



10. **Review and Confirm**:
    a. The final page serves as a summary for users to review all mapping selections. Click "Finish" to create the new IntelAgree Mapping Template.
11. **IntelAgree Mapping Template Created**:

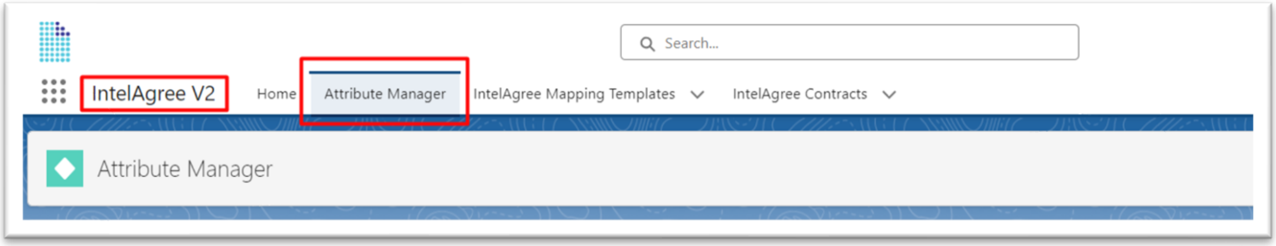
   a. Once created, the new mapping template will be visible in the IntelAgree Mapping Template table for reference and future management.



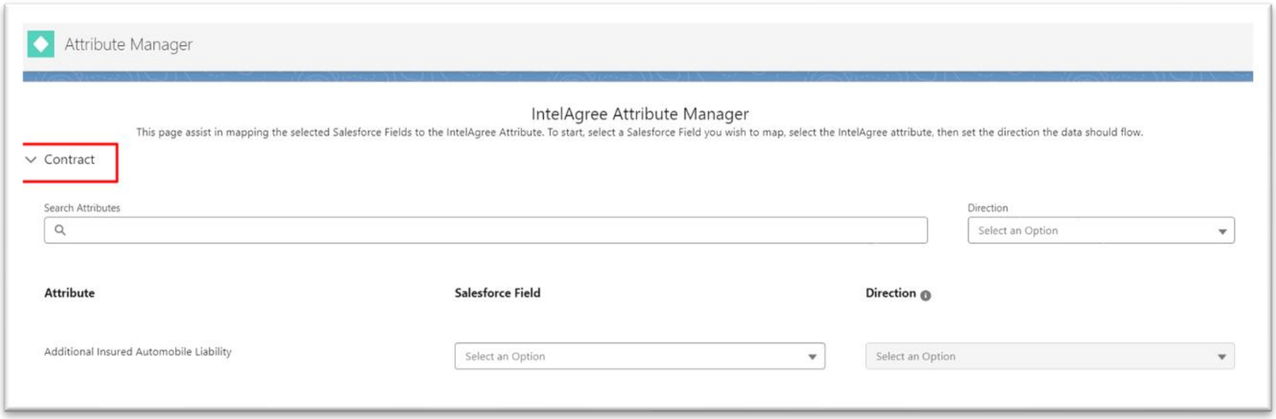
Configuring IntelAgree Attribute Manager:

The Salesforce V2 Attribute Manager allows the Salesforce admin to map selected Salesforce fields to IntelAgree Attributes. To effectively map fields using the Attribute Manager in IntelAgree V2, follow these step-by-step instructions:

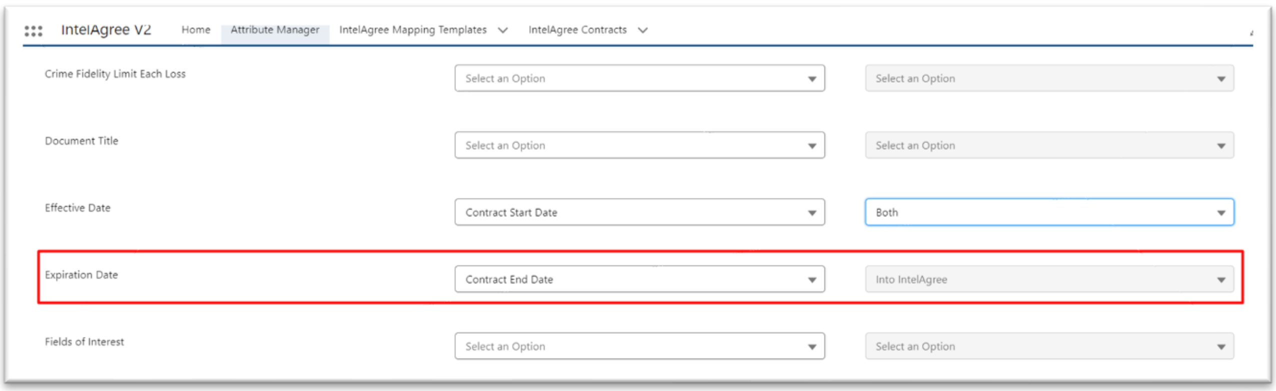
1. **Access the Attribute Manager:**
   a. Navigate to "IntelAgree V2" and click on the "Attribute Manager" tab.



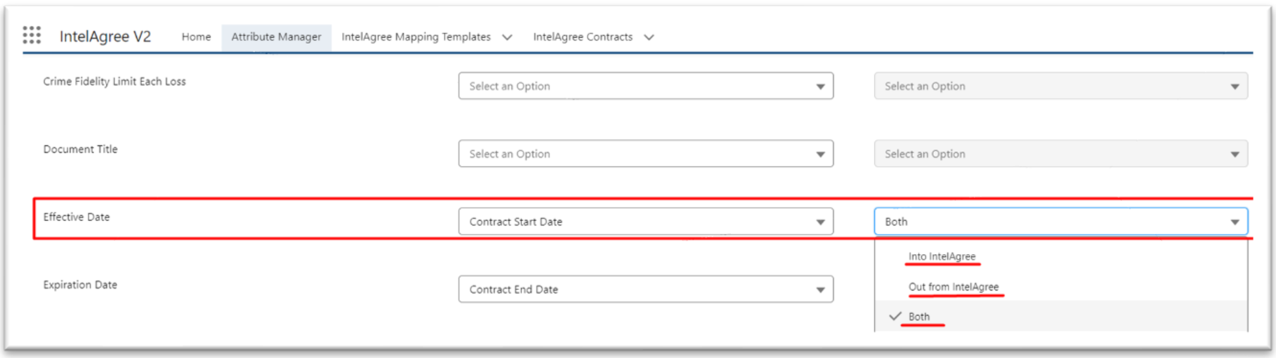
2. **Expand Salesforce Object:**
   a. Expand the Salesforce Object for which you want to map fields.



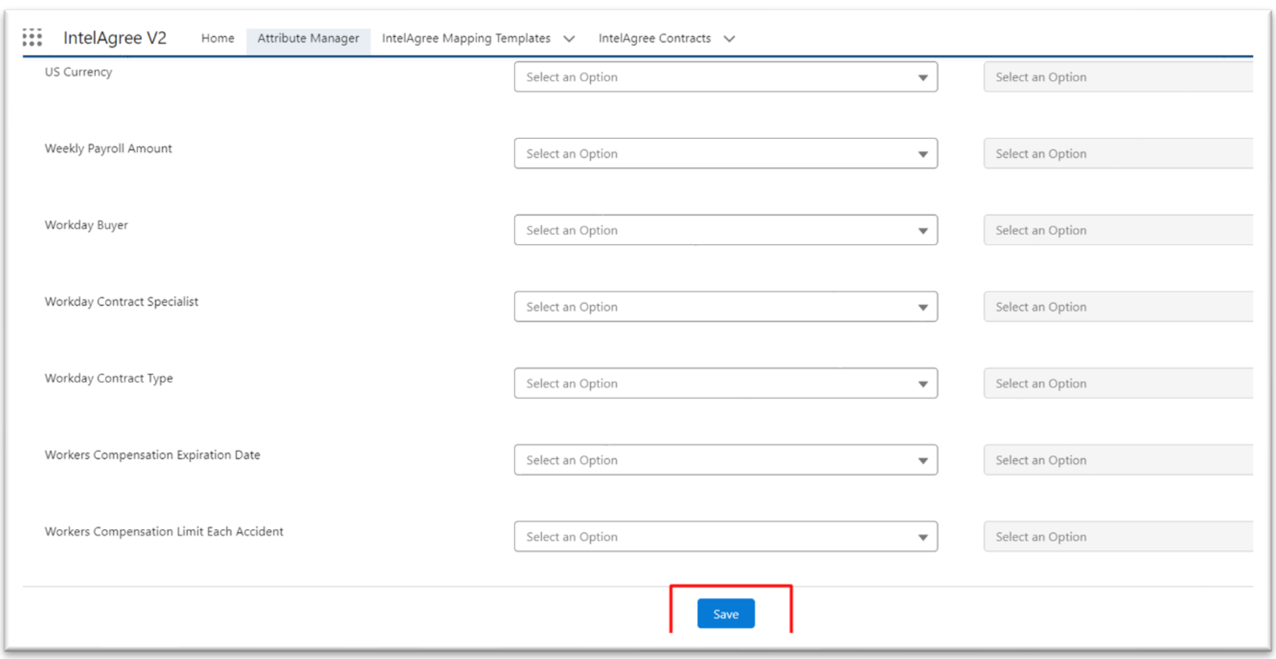
3. **Select Salesforce Field:**
    a. In the left-hand column, find the name of the IntelAgree Attribute and click on the "Salesforce Field" column to choose the object field to map to the IntelAgree attribute.
4. **Populate Direction Field:**
    a. After selecting the Salesforce field, the "Direction" field will auto-populate based on the chosen field.
        i. If the field is inbound or outbound only, the selection will prepopulate, and the admin cannot update it.



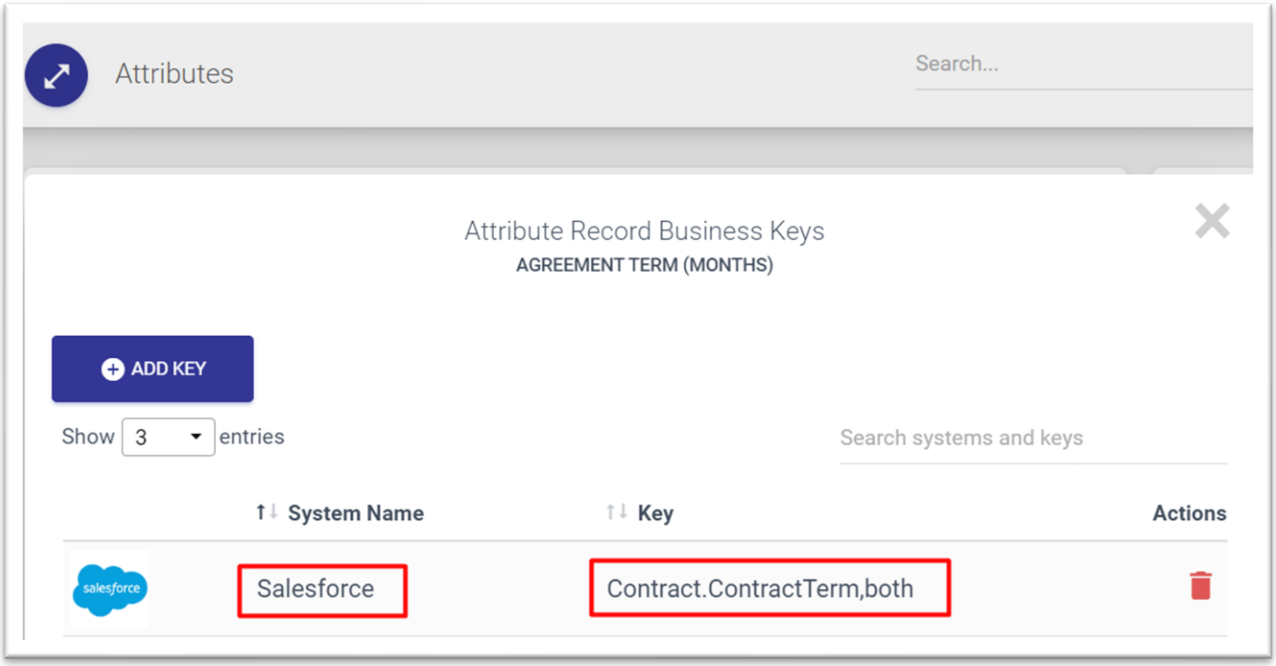
        ii. If the field is dynamic and can be both inbound and outbound, the "Direction" field becomes editable, defaulting to "Both," but the admin can change it to inbound or outbound if desired.



5. **Save Mapping:**
    a. After mapping all desired attributes, click "Save" to confirm the field mappings.
    b. Note: when upgrading from V1 to V2 all existing attributes will be populated so the only action that is needed is to click “Save” to update all existing attributes to the new V2 Business Key format.



6. **Verify Attribute in IntelAgree:**
    a. Check the Attribute in IntelAgree, which should now contain a Salesforce Business Key indicating the direction of the data flow.



Adding IntelAgree Lightning Components to the Page:

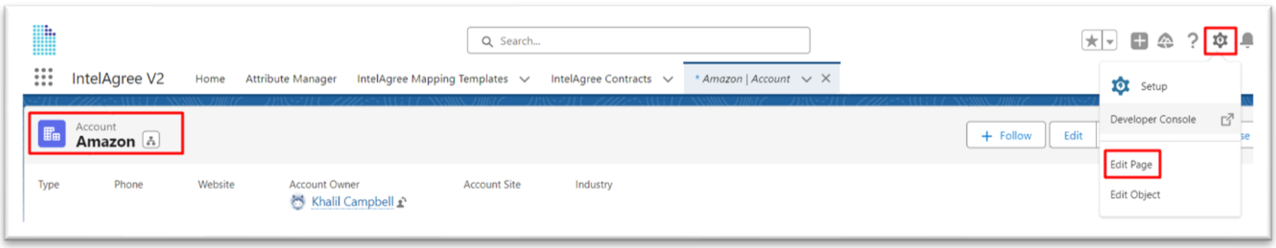
The IntelAgree Package will include two V2 lightning components that should be added to pages in Salesforce.

- Contracts List By Party
- Contracts Related to Object

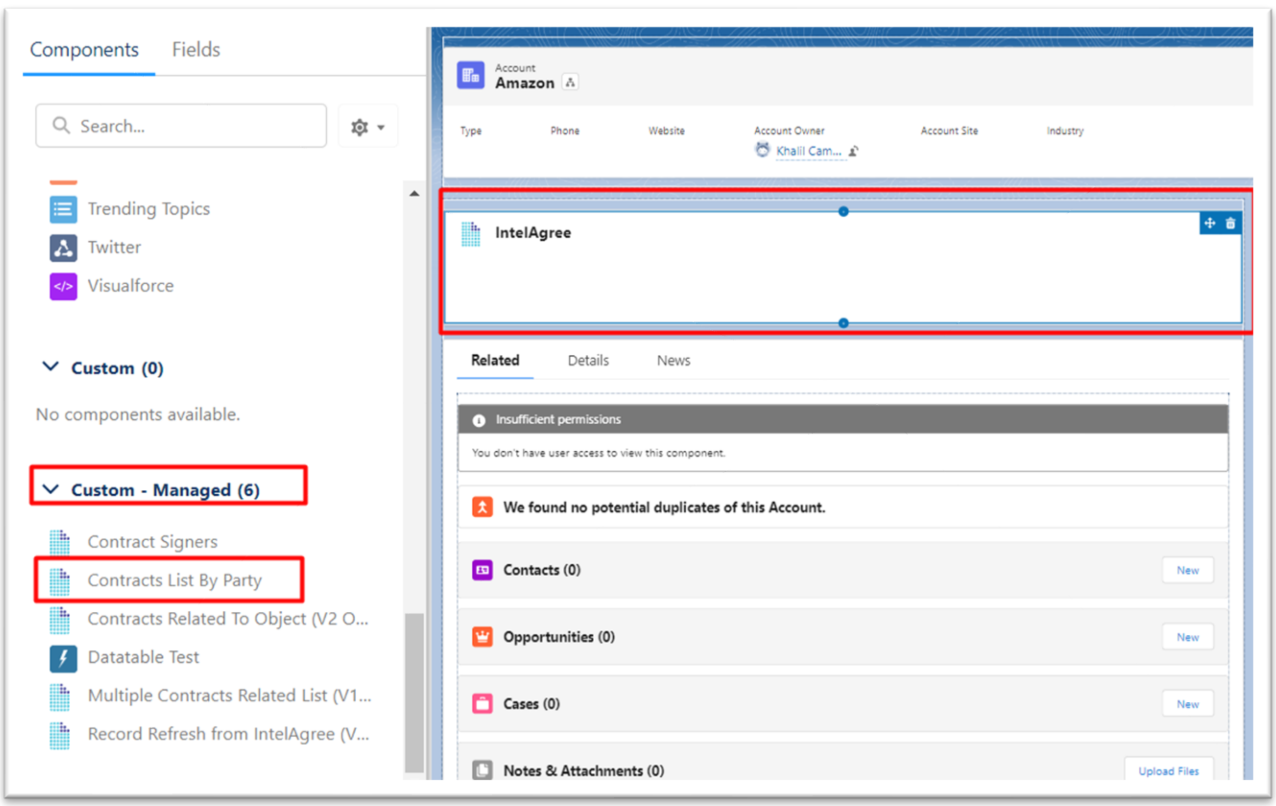
Contracts List By Party:

To integrate the "Contracts List By Party" Lightning component into a Salesforce page, follow these step-by-step instructions:

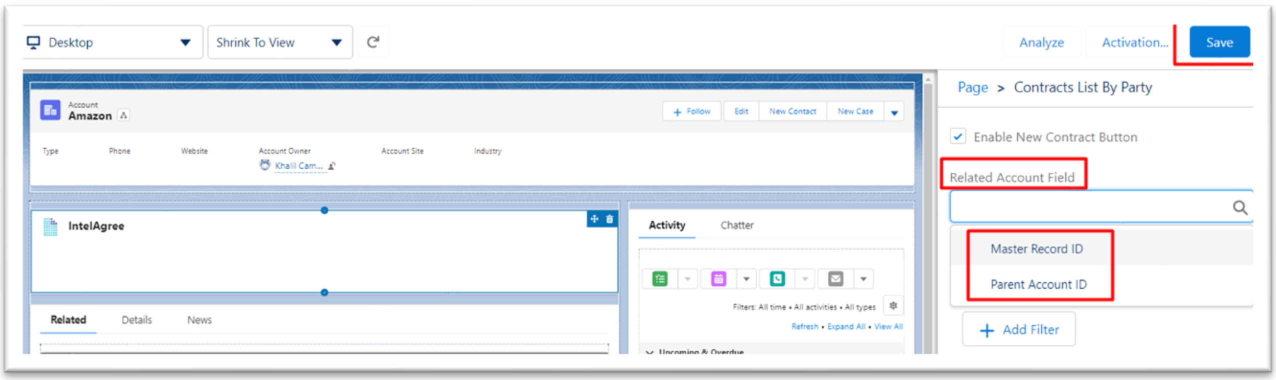
1. **Navigate to the Object:**
    a. Go to the "Accounts" Object or any Object with a lookup to the account. Click on the "Setup" cogwheel, then select "Edit Page."



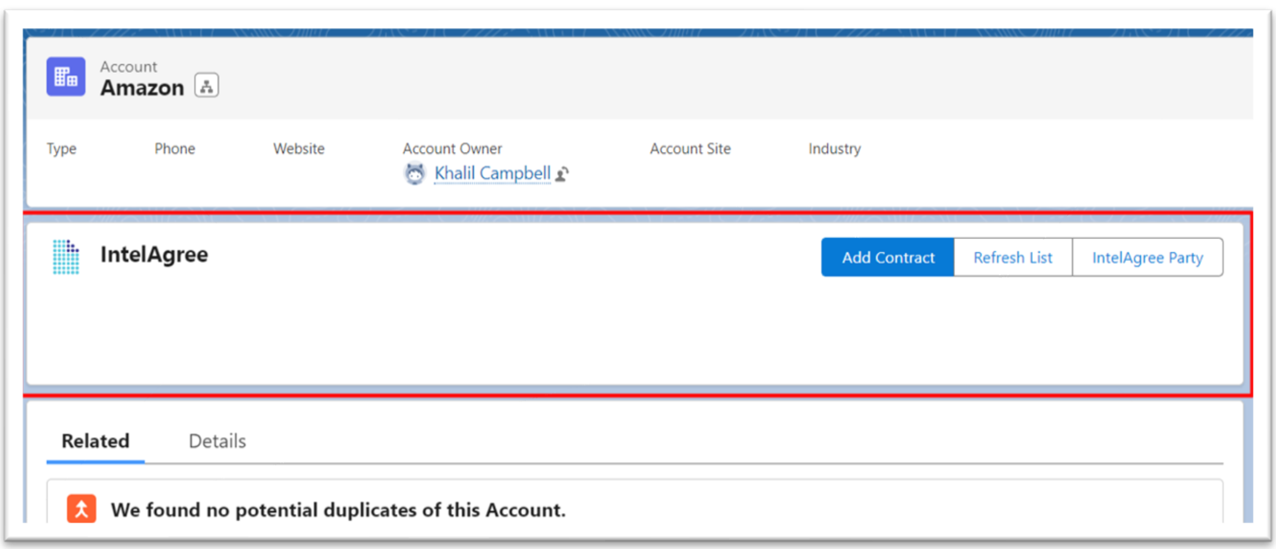
2. **Locate and Add Lightning Component:**
    a. In the left side pane, scroll down to the "Custom – Managed" section. Locate the lightning component named "Contracts List By Party." Drag and drop the component onto the desired location on the page.



3. **Configure Component Settings:**
    a. On the right-side settings pane for the component, set the "Related Account Field" to either "Master Record Id" or "Parent Account Id," depending on the relationship of the account being used. Click "Save."



4. **Confirm Component Addition:**
    a. Return to the Salesforce Object and verify that the "Contracts List By Party" Lightning component has been successfully added to the page.



5. **Verify Data Presence:**
    a. If the component is present but does not display any data, confirm in IntelAgree that a Business Key connection has been established between IntelAgree Party and Salesforce Account, and that the Party has associated contracts.

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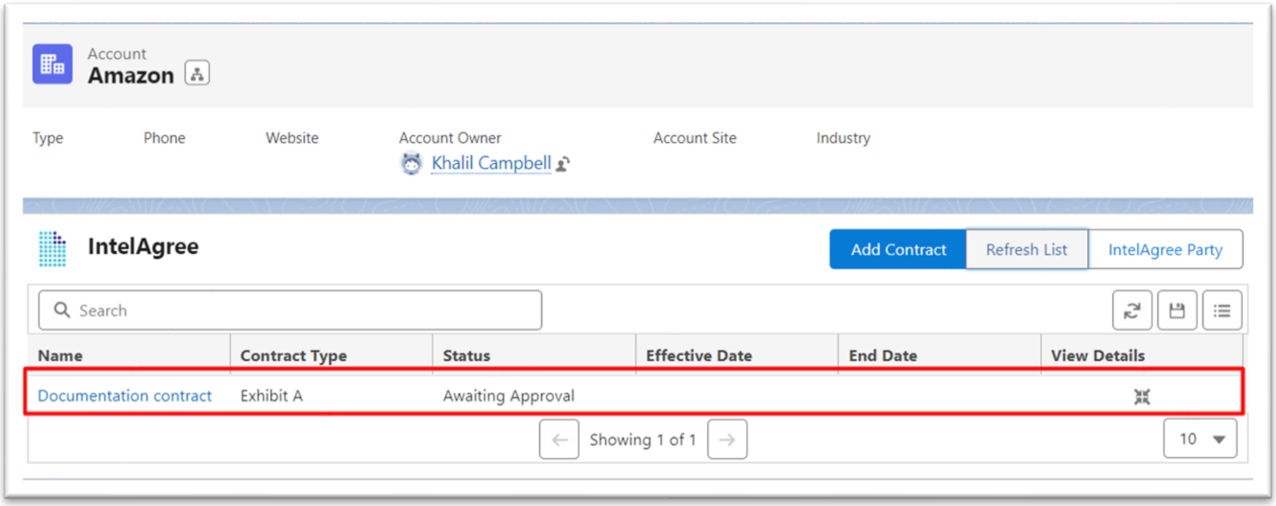
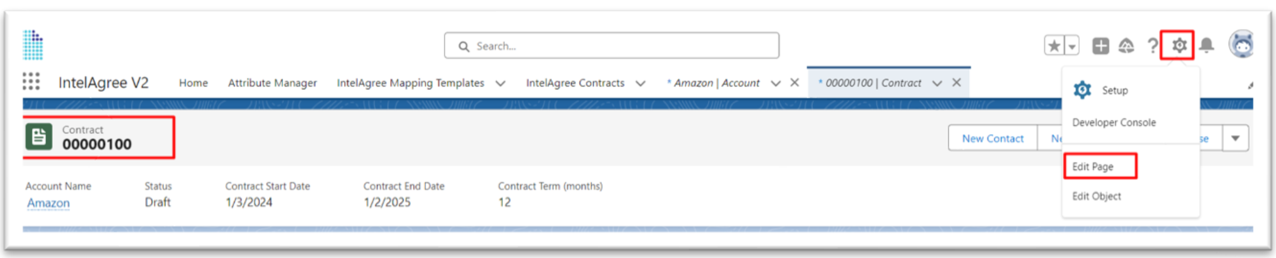


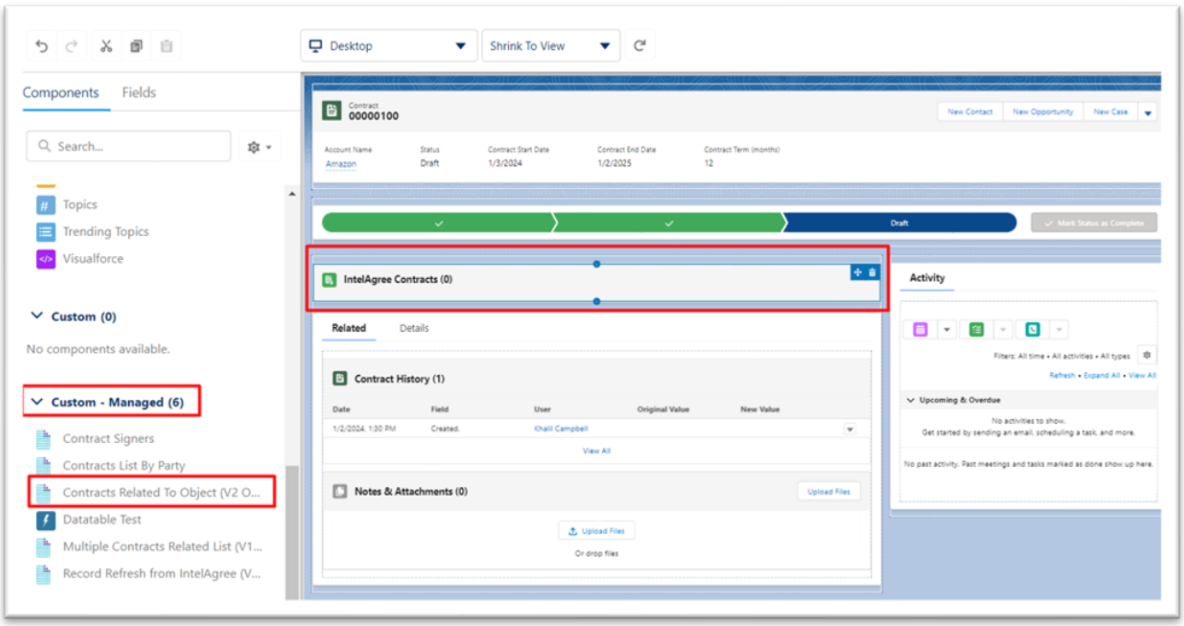
Contracts Related to Object:

The “contracts Related to Object” Component allows users to view all contracts that are associated with the Salesforce Object. This component must be added to an object that has a lookup to the Account record and is required in order for the integration to perform correctly. To successfully add the "Contracts Related to Object (V2 Only)" component to a Salesforce page, follow these step-by-step instructions:

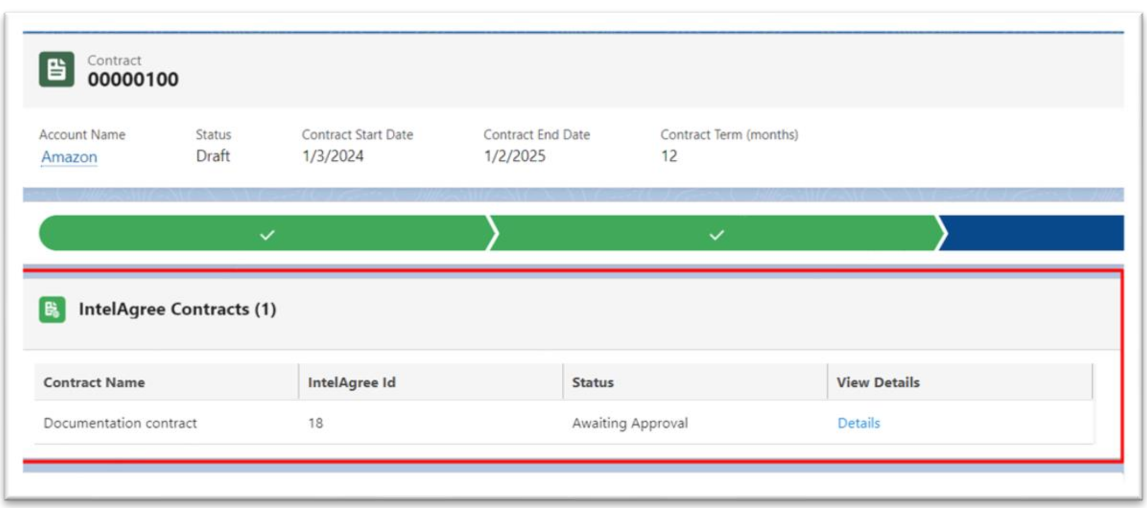
1. Navigate to Salesforce Object:
    a. Go to a Salesforce object that has a lookup to the account. Click on the "Setup" cogwheel and select "Edit Page."



2. From the left-hand navigation pane, scroll down to the "Custom – Managed" section. Drag and drop the "Contracts Related to Object (V2 Only)" component onto the page.



3. Navigate back to the Salesforce Object and confirm that the related contracts component has been added to the page. This component should be empty until a contract is created that is associated with the Salesforce Object. If the multiple contracts per Salesforce Object setting is enabled, all contracts that are related to the Salesforce Object will appear in this component.



Configuring IntelAgree V2 Action Buttons:

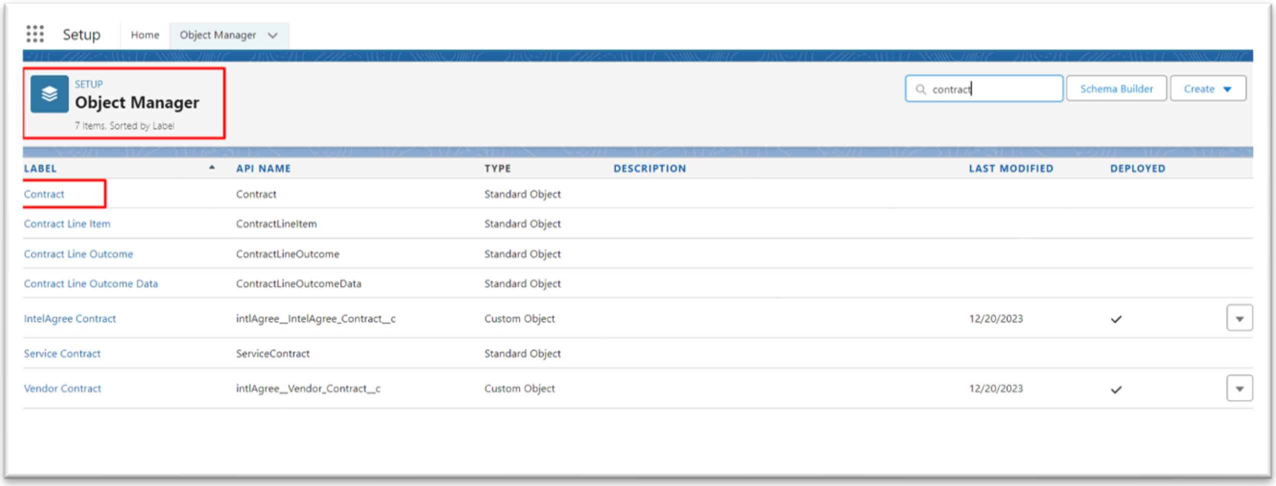
The Integration package allows the Salesforce Admin to configure action buttons that allow the user to take advantage of IntelAgree functionality by proving the user specific actions such as:

- Creating a new IntelAgree contract
- Binding an existing IntelAgree contract
- Viewing the contract details.

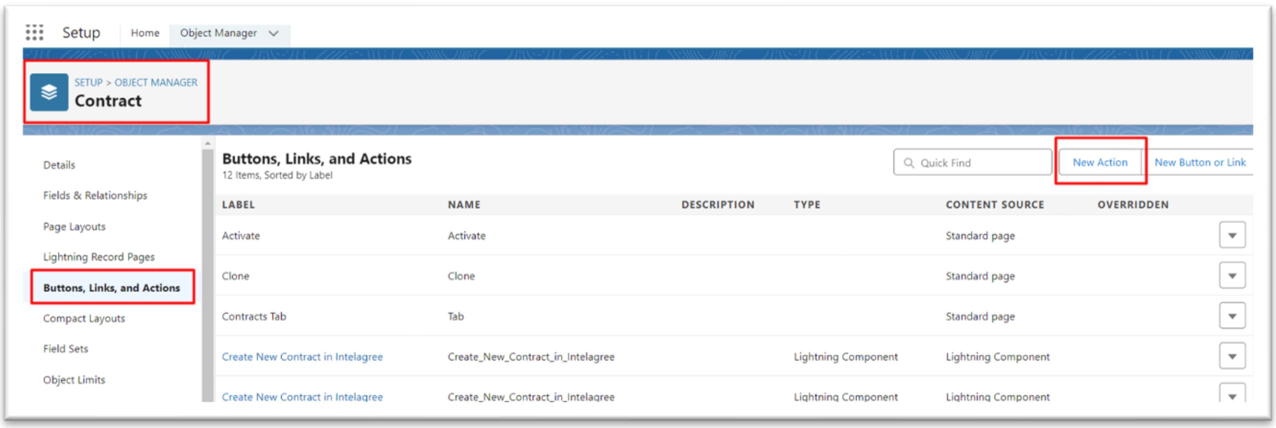
"Create New Contract V2" Action Button:

The “Create New Contact” action button allows the Salesforce Administrator to create an action button on any object that has a direct lookup to the account object. To utilize, please follow the following steps:

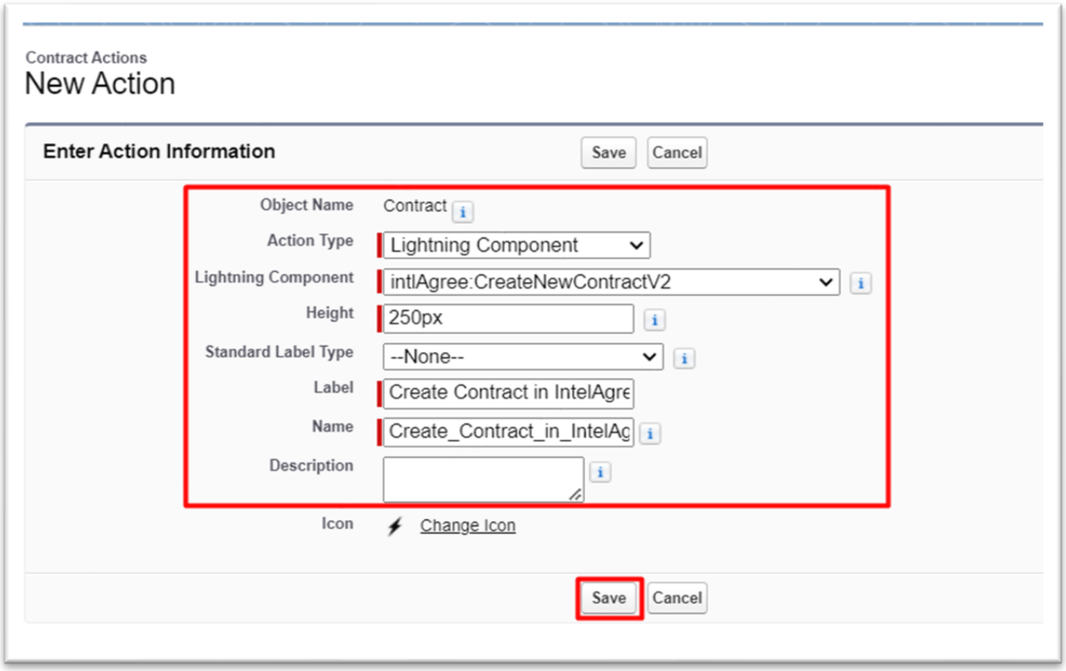
1. **Navigate to Object Manager**:
    a. Go to Setup -> Object Manager and select the object you wish to edit (e.g., Contract, Opportunity, etc.).



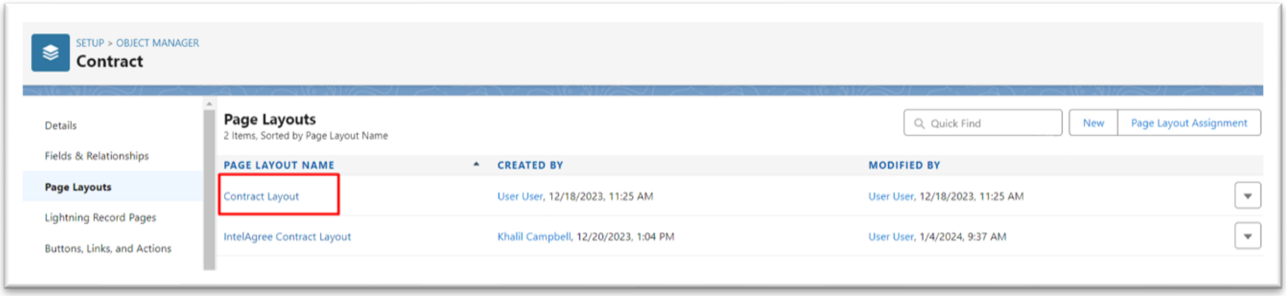
2. **Create New Action**:
    a. In the selected object, navigate to “Buttons, Links, and Actions” and click on "New Action."



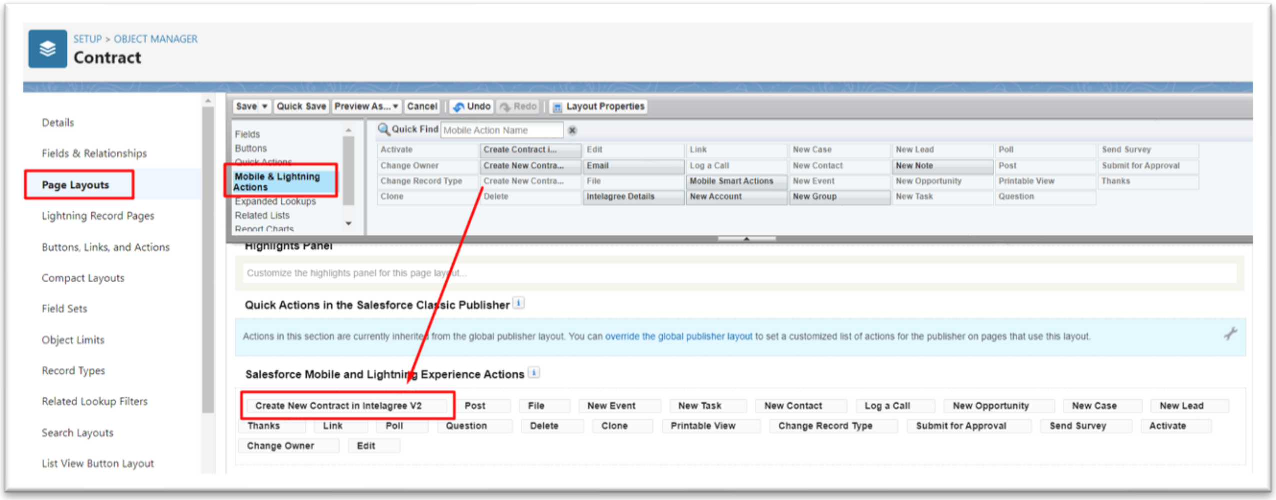
b. On the New Action Screen, set the following fields:
   i. Action Type: Lightning Component
   ii. Lightning Component: intlAgree:CreateNewContractV2
   iii. Height: 250px
   iv. Standard Label Type: None
   v. Label: Create Contract in IntelAgree (or customize as needed)
   vi. Name: (auto-populated from the Label)
   vii. Description: (user discretion)



3. **Save the Action**:
    a. Click "Save" to save the new action.
4. **Add Action to Page Layouts**:
    a. Navigate to "Page Layouts" and select the desired page layout(s).

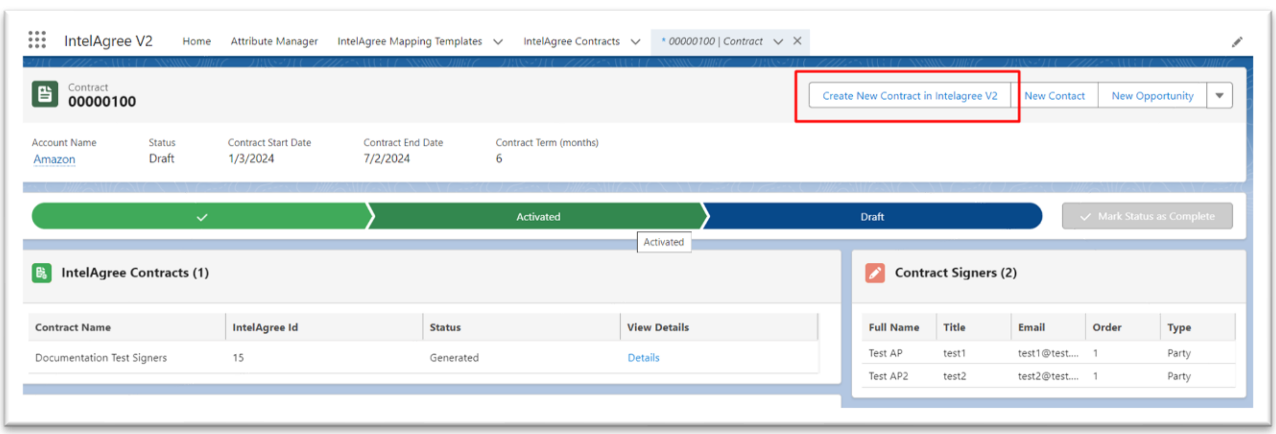


    b. Under "Mobile & Lightning Actions", find the newly created button and drag it into the "Salesforce Mobile and Lightning Experience Actions" section.



c. Click “Save” to ensure that the button is added to the page.

5. **Verify Button on Object Detail Page**:
   a. Navigate to the object's detail page, and you should now see the "Create Contract in IntelAgree" button. Note: Drag the new action to the front of the list of actions for easy access.

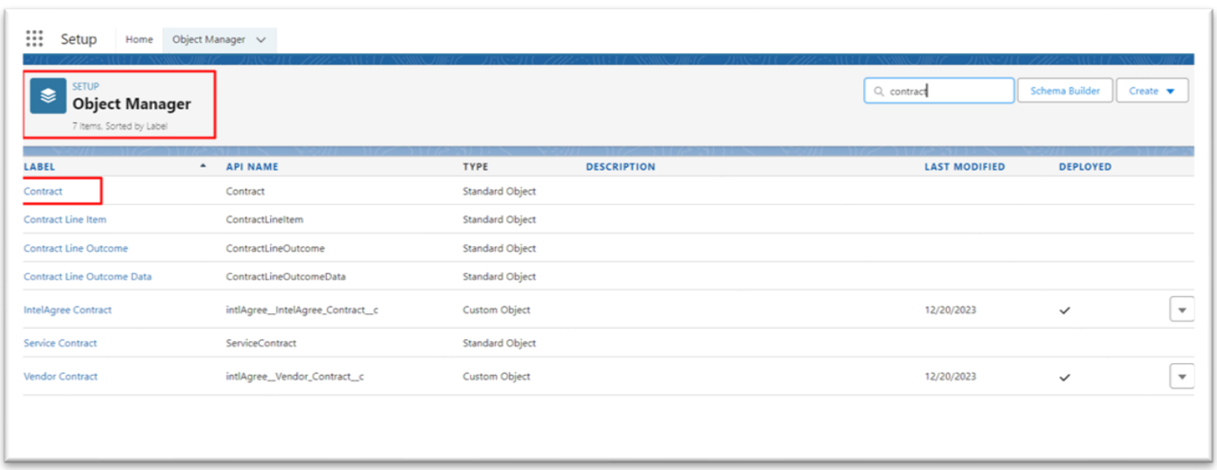


6. **Post-Creation Usage**:
   a. After creating a new record, clicking the "Create New Contract in IntelAgree" button will open a new page that will prompt you to provide information to create the contract in IntelAgree.

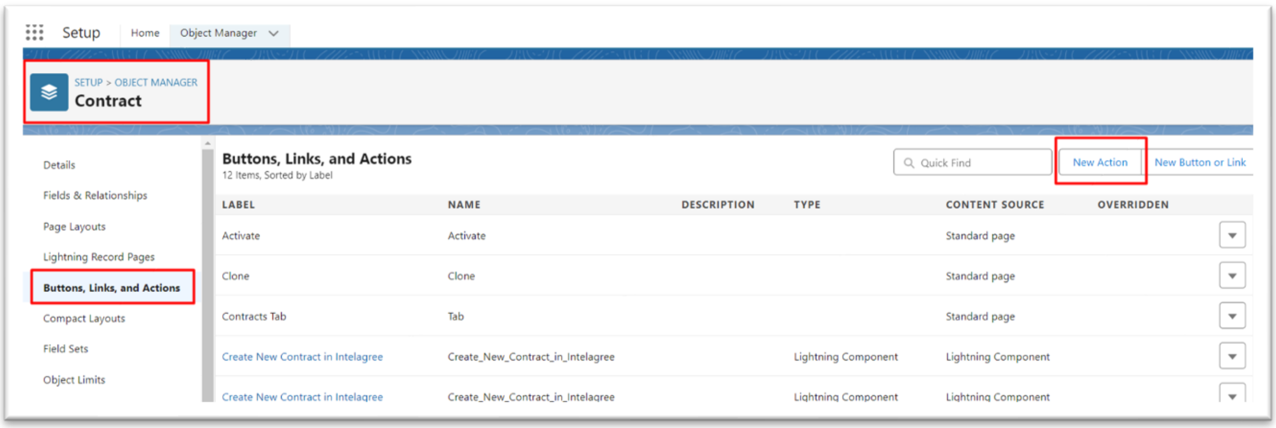
"Bind Existing IntelAgree Contract" Action Button:

The “Bind Existing IntelAgree Contract” action button allows the Salesforce Administrator to create an action button on any object that has a direct lookup to the account object. This button will allow the user to bind an existing IntelAgree contract that does not already contain a Salesforce Business Key to the current Salesforce record. To utilize, please follow the following steps:

1. **Navigate to Object Manager**:
    a. Go to Setup -> Object Manager and select the object you wish to edit (e.g., Contract, Opportunity, etc.).

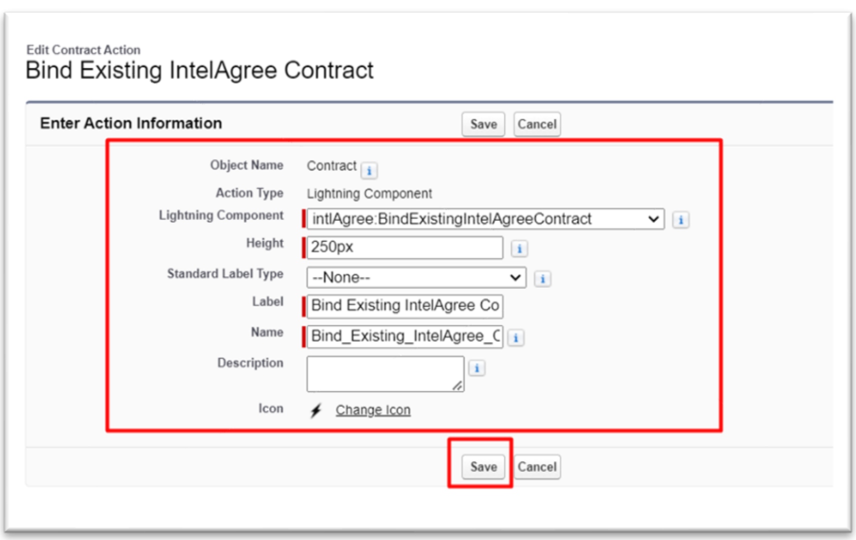


2. **Create New Action**:
    a. In the selected object, navigate to “Buttons, Links, and Actions” and click on "New Action."

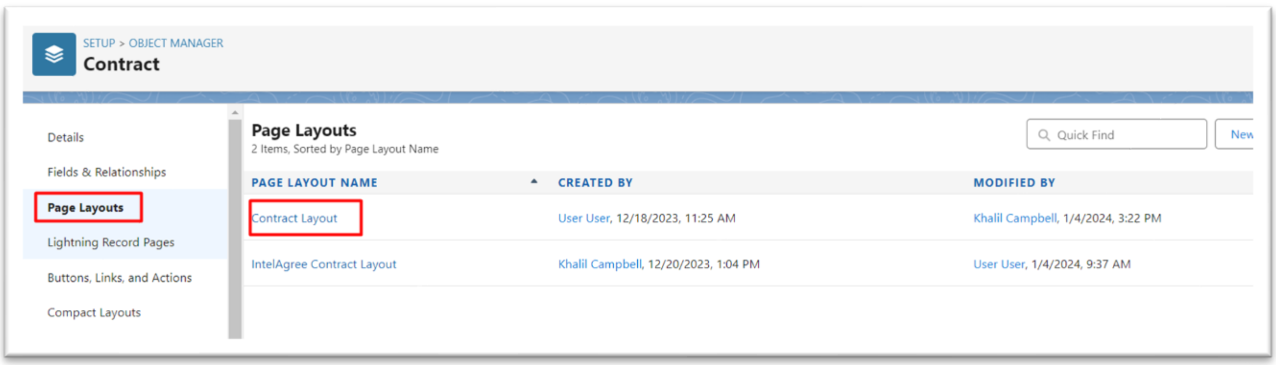


b. On the New Action Screen, set the following fields:
   i. Action Type: Lightning Component
   ii. Lightning Component: intlAgree:BindExistingIntelAgreeContract
   iii. Height: 250px
   iv. Standard Label Type: None
   v. Label: Bind Existing IntelAgree Contract (or customize as needed)
   vi. Name: (auto-populated from the Label)
   vii. Description: (user discretion)

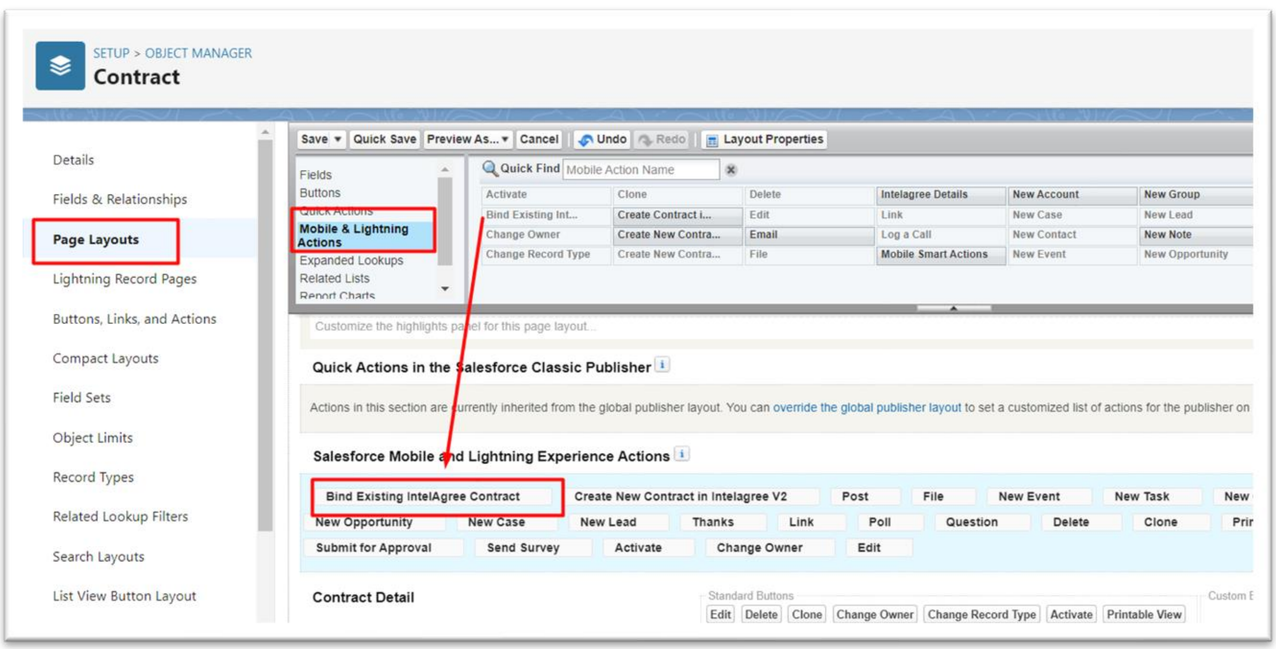
3. **Save the Action**:
   a. Click “Save” to save the new action.



4. **Add Action to Page Layouts**:
    a. Navigate to Page Layouts and select the desired page layout(s).

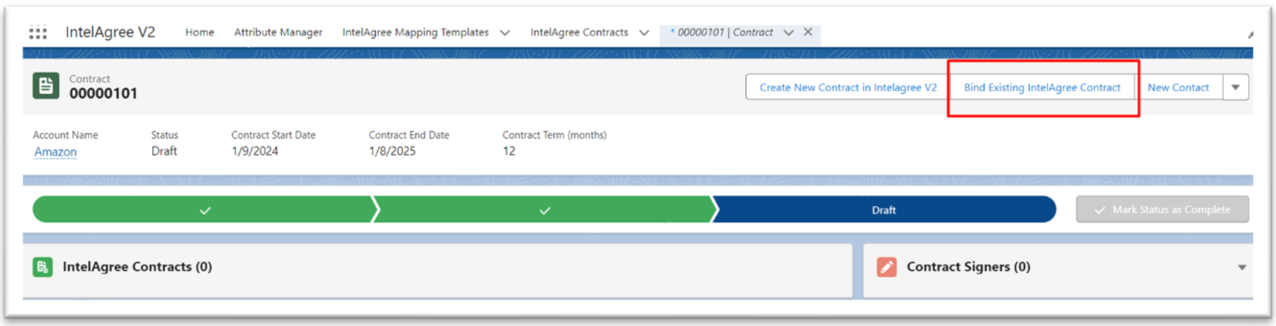


    b. Under Mobile & Lightning Actions, find the newly created button and drag it into the Salesforce Mobile and Lightning Experience Actions section.
    c. Click "Save."



5. **Verify Button on Object Detail Page**:

   a. Navigate to the object's detail page, and you should now see the "Bind Existing IntelAgree Contract" button. Note: Drag the new action to the front of the list of actions for easy access.



6. **Post-Creation Usage**:
   a. After creating a new record, clicking the "Bind Existing IntelAgree Contract" button will display a modal prompting you to select which contracts in intelAgree to associate to the current Salesforce record.

"IntelAgree Contract Details" Action Button:

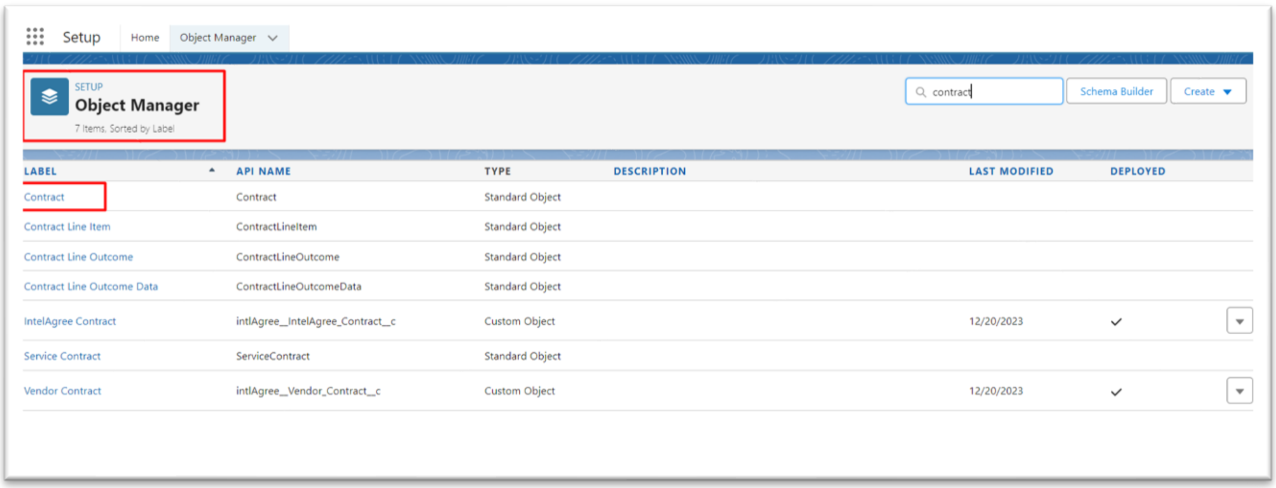
This action button allows the Salesforce Administrator to create an action button on any object that has a direct lookup to the account object that allows the user to view the IntelAgree contract details.

Note: This component comes configured with the integration and should not need to be setup. If for some reason the button is not present follow the steps below to add it to the page:

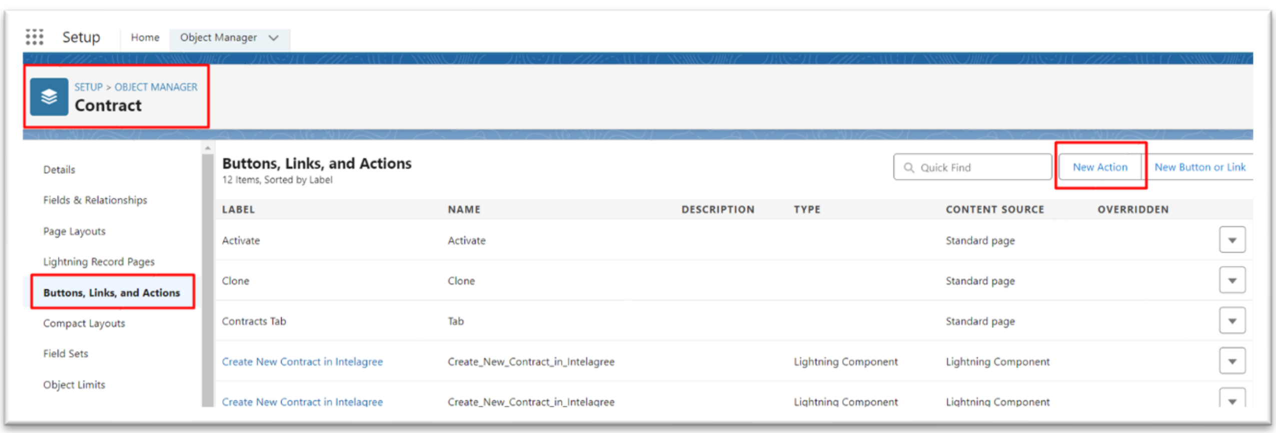
1. **Navigate to Object Manager**:
   a. Go to Setup -> Object Manager and select the object you wish to edit (e.g., Contract, Opportunity, etc.).

intelagree

Your Contracts. Evolved.

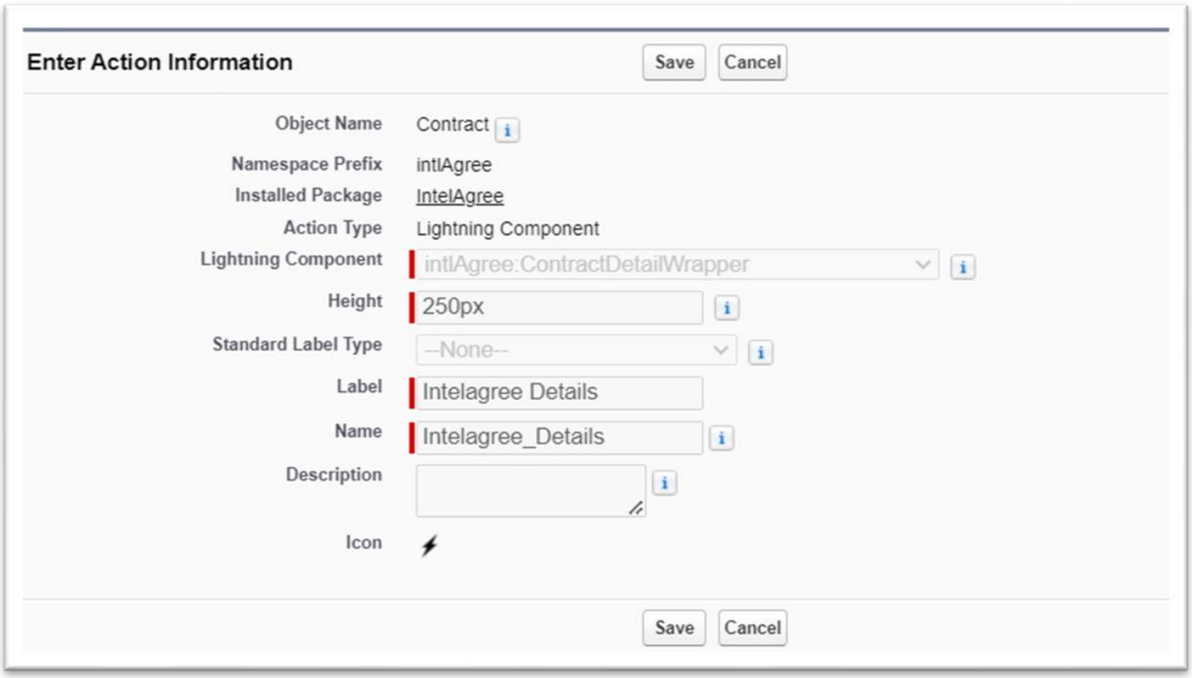


2. **Create New Action**:
    a. In the selected object, navigate to “Buttons, Links, and Actions” and click on "New Action."

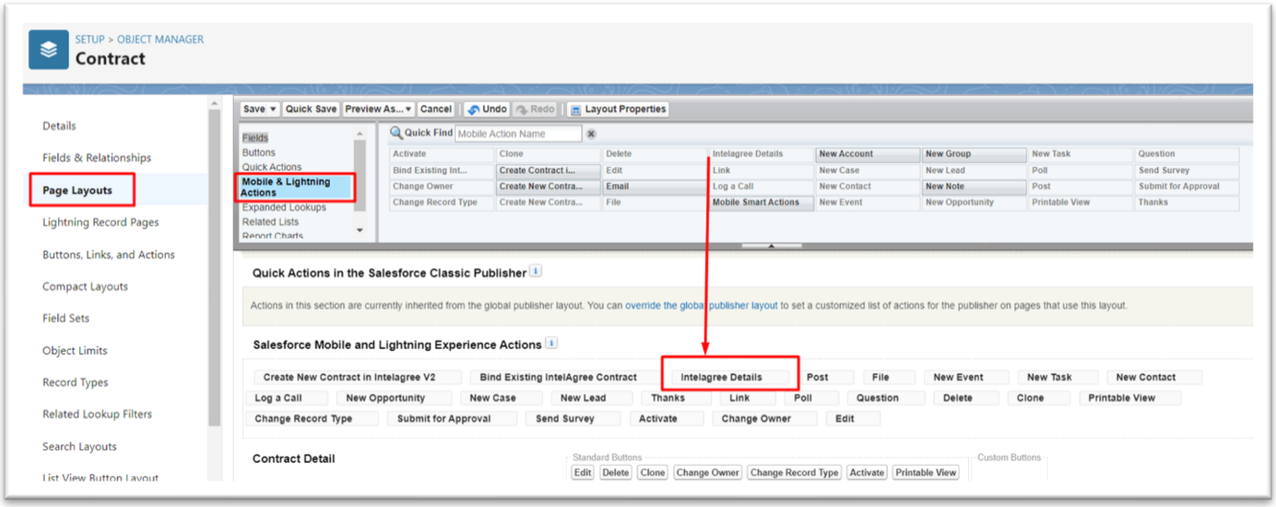


    b. On the New Action Screen, set the following fields:
        i. Action Type: Lightning Component
        ii. Lightning Component: intlAgree:ContractDetailWrapper
        iii. Height: 250px
        iv. Standard Label Type: None
        v. Label: IntelAgree Contract Details (or customize as needed)
        vi. Name: (auto-populated from the Label)
        vii. Description: (user discretion)

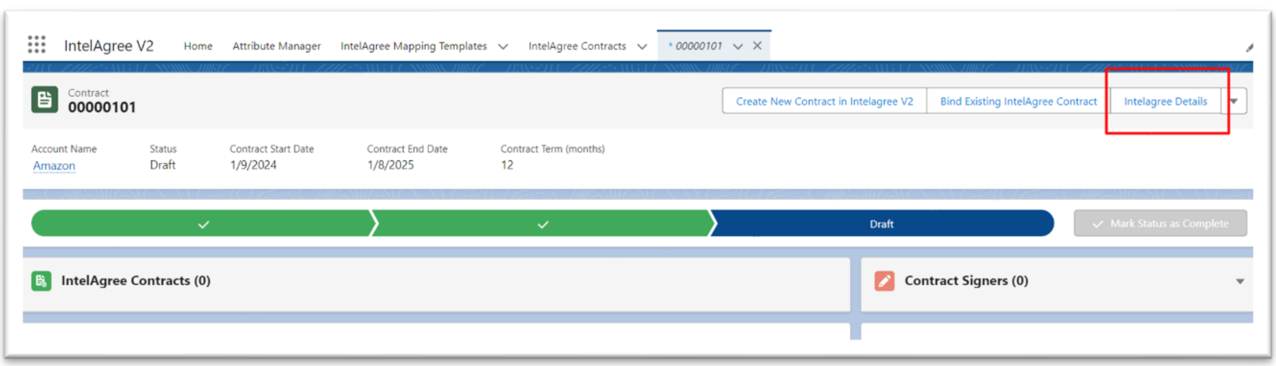
3. **Save the Action**:
    a. Click “Save” to save the new action.


Enter Action Information
Save Cancel
Object Name: Contract
Namespace Prefix: intlAgree
Installed Package: IntelAgree
Action Type: Lightning Component
Lightning Component: intlAgree:ContractDetailWrapper
Height: 250px
Standard Label Type: --None--
Label: Intelagree Details
Name: Intelagree_Details
Description:
Icon:
Save Cancel

4. **Add Action to Page Layouts**:
    a. Navigate to Page Layouts and select the desired page layout(s).
    b. Under Mobile & Lightning Actions, find the newly created button and drag it into the Salesforce Mobile and Lightning Experience Actions section.



5. **Verify Button on Object Detail Page**:
    a. Navigate to the object's detail page, and you should now see the "IntelAgree Contract Details" button. Note: Drag the new action to the front of the list of actions for easy access.



6. **Post-Creation Usage**:
    a. After creating a new record, clicking the "IntelAgree Contract Details" button will display a modal proving you with information related to the most recent IntelAgree contract that is associated with the current Salesforce record.