



Salesforce Integration

Configuration Guide – V2





Your Contracts. Evolved.

Table of Contents

Table of Contents	2
Introduction:	3
Installing the IntelAgree Salesforce Integration:	4
Getting the App from the App Exchange	4
Assign IntelAgree Application Admin Permission Set:	6
Configure API Settings:	9
API Settings - First Time Configuration:	10
API Settings Page – Modifying Existing Configuration	13
Configuring IntelAgree Mapping Templates:	16
Configuring IntelAgree Attribute Manager:	21
Adding IntelAgree Lightning Components to the Page:	24
Contracts List By Party:	24
Contracts Related to Object:	27
Configuring Salesforce Action Buttons:	29
"Create New Contract V2" Action Button:	29
"Bind Existing IntelAgree Contract" Action Button:	33
"IntelAgree Contract Details" Action Button:	36



Your Contracts. Evolved.

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

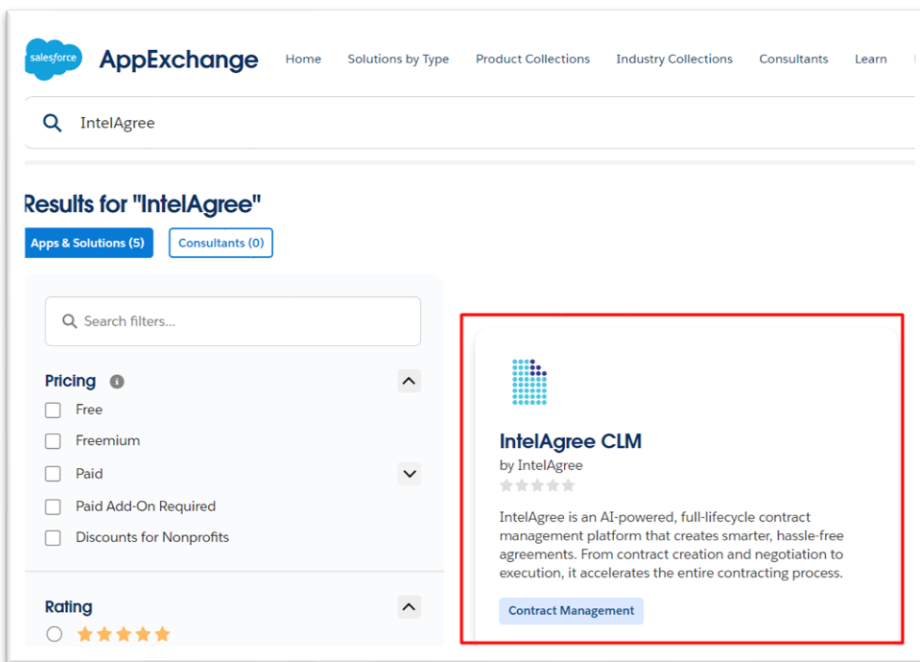
Installing the IntelAgree Salesforce Integration:

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.

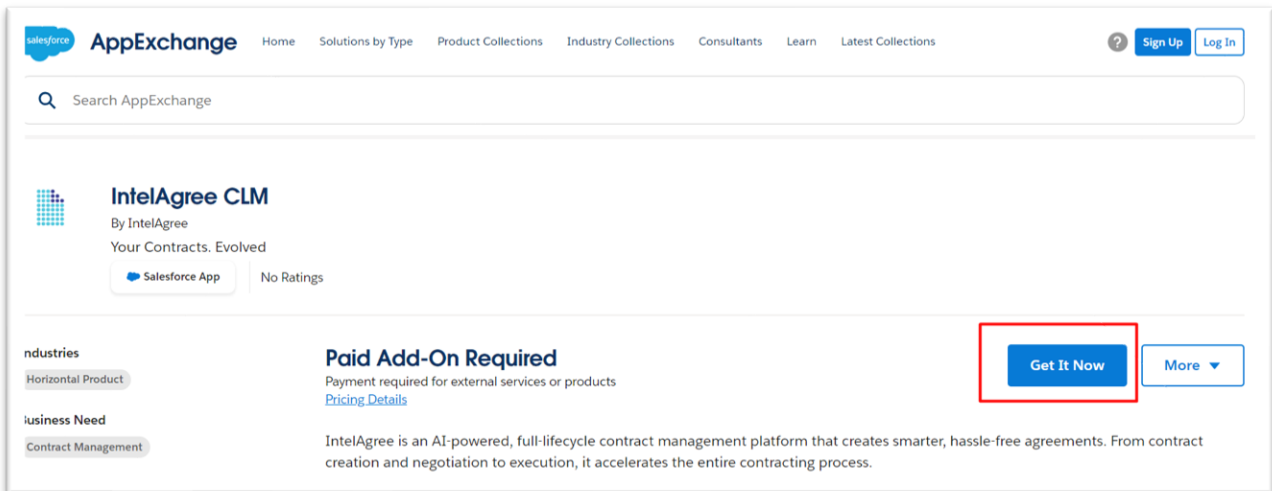
Getting the App from the App Exchange

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."



AppExchange Home Solutions by Type Product Collections Industry Collections Consultants Learn Latest Collections

Search AppExchange

IntelAgree CLM
By IntelAgree
Your Contracts. Evolved
Salesforce App No Ratings

Industries
Horizontal Product

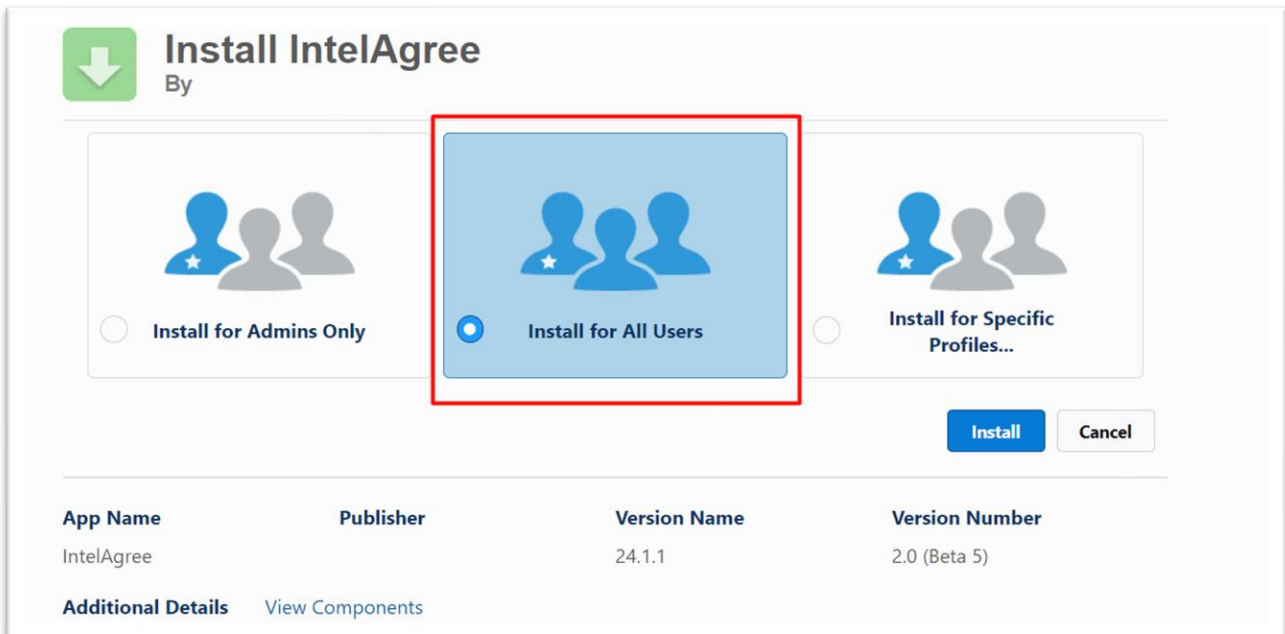
Business Need
Contract Management

Paid Add-On Required
Payment required for external services or products
[Pricing Details](#)

Get It Now More

IntelAgree is an AI-powered, full-lifecycle contract management platform that creates smarter, hassle-free agreements. From contract creation and negotiation to execution, it accelerates the entire contracting process.

5. When prompted, select "Install for All Users."



Install IntelAgree
By

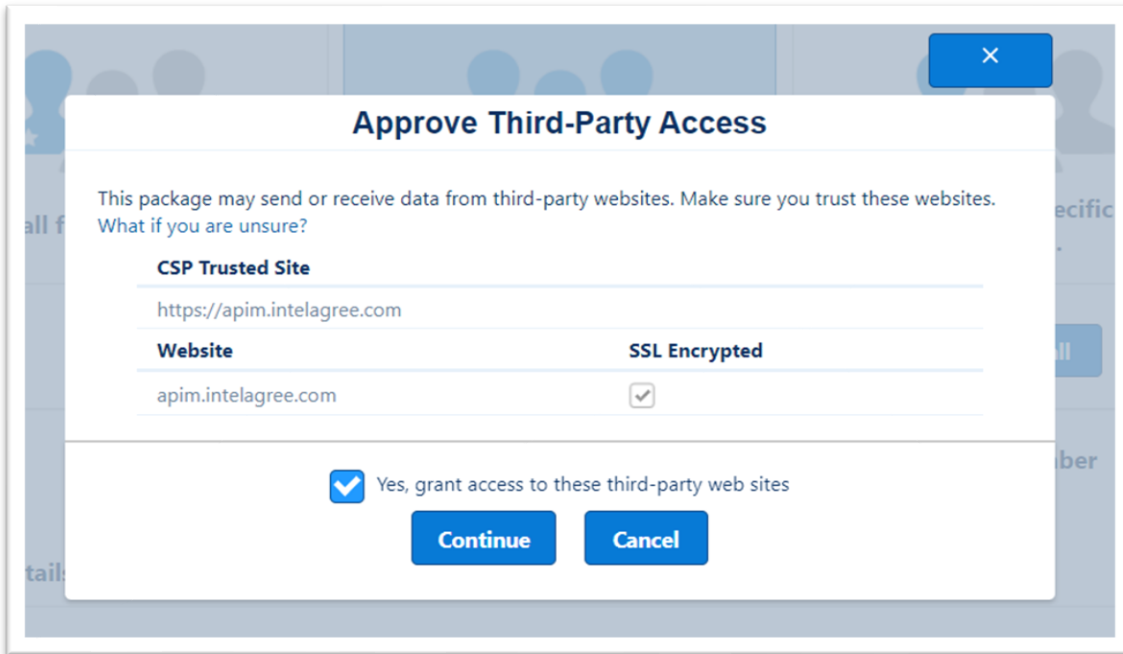
Install for Admins Only Install for All Users Install for Specific Profiles...

Install Cancel

App Name	Publisher	Version Name	Version Number
IntelAgree		24.1.1	2.0 (Beta 5)

Additional Details [View Components](#)

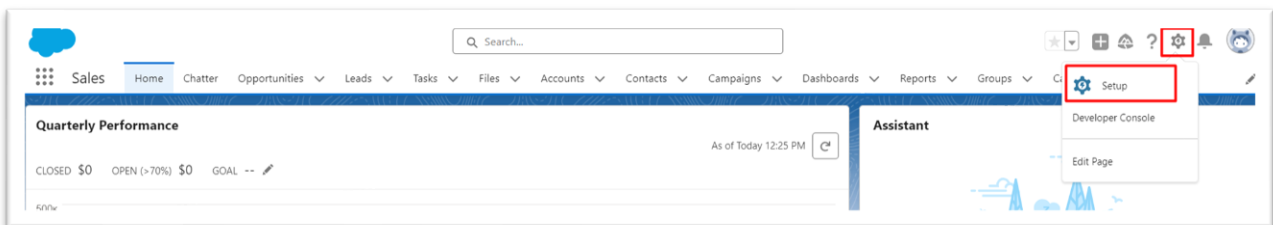
6. Check the box to allow access to third-party websites, then click "Continue."



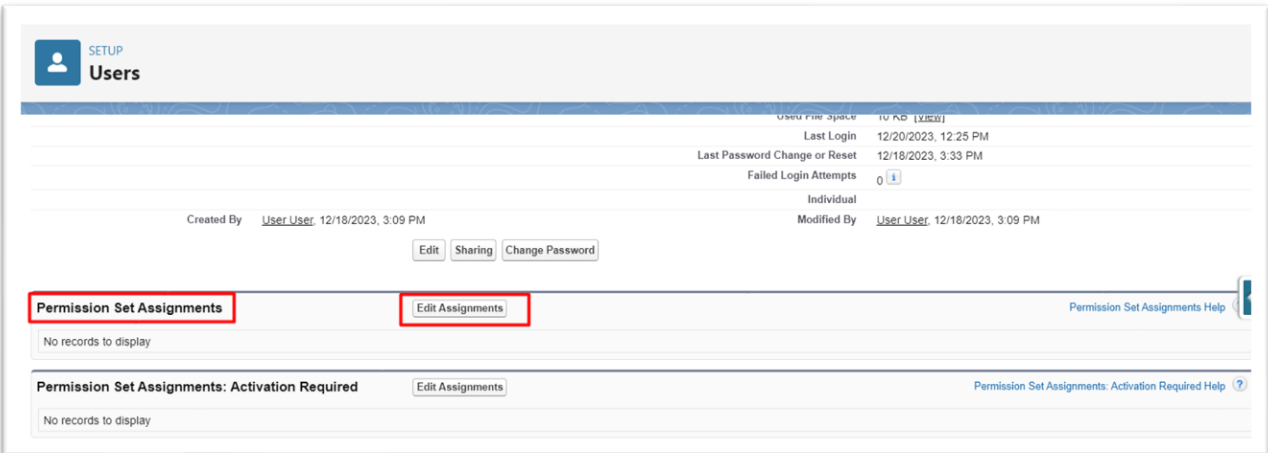
Assign IntelAgree Application Admin Permission Set:

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.



Users

Created By: User User 12/18/2023, 3:09 PM

Modified By: User User 12/18/2023, 3:09 PM

Buttons: Edit, Sharing, Change Password

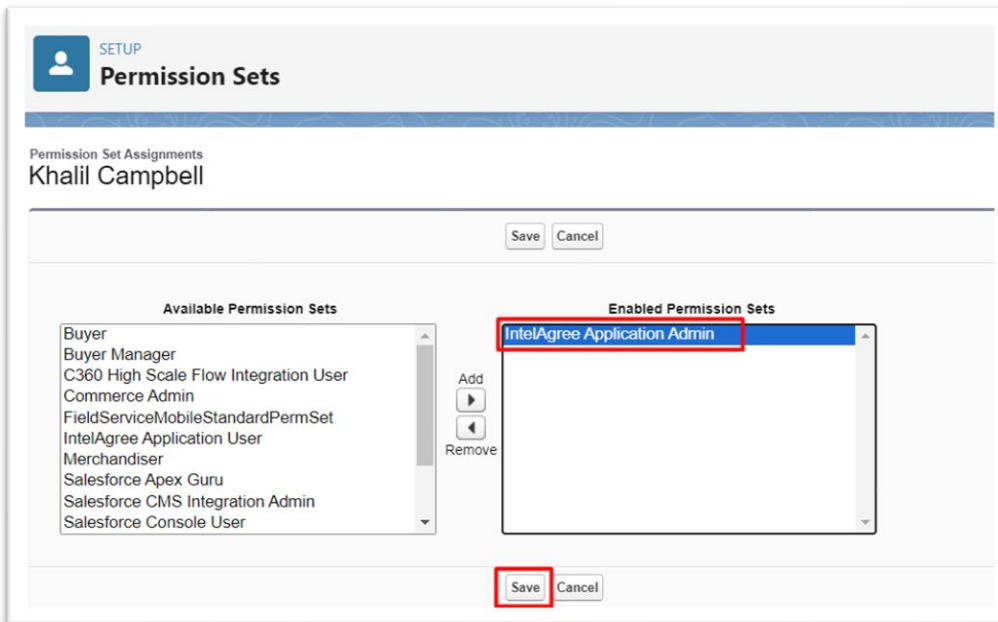
Permission Set Assignments | Edit Assignments | Permission Set Assignments Help

No records to display

Permission Set Assignments: Activation Required | Edit Assignments | Permission Set Assignments: Activation Required Help

No records to display

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."



Permission Sets

Permission Set Assignments
Khalil Campbell

Buttons: Save, Cancel

Available Permission Sets

- Buyer
- Buyer Manager
- C360 High Scale Flow Integration User
- Commerce Admin
- FieldServiceMobileStandardPermSet
- IntelAgree Application User
- Merchandiser
- Salesforce Apex Guru
- Salesforce CMS Integration Admin
- Salesforce Console User

Buttons: Add, Remove

Enabled Permission Sets

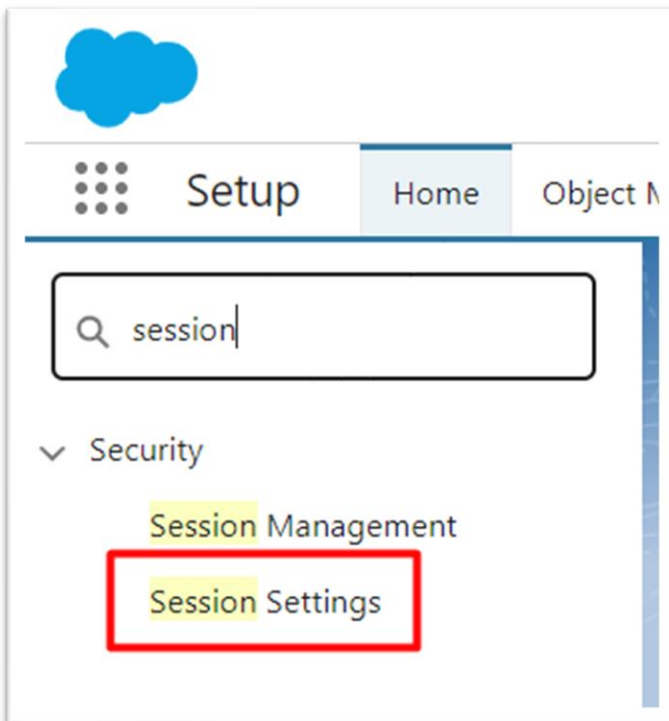
- IntelAgree Application Admin

Buttons: Save, Cancel

Enabling Lightning Web Security for Lightning Web Components:

To ensure that all Lightning Web Components are working as intended, the Lightning Web 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."

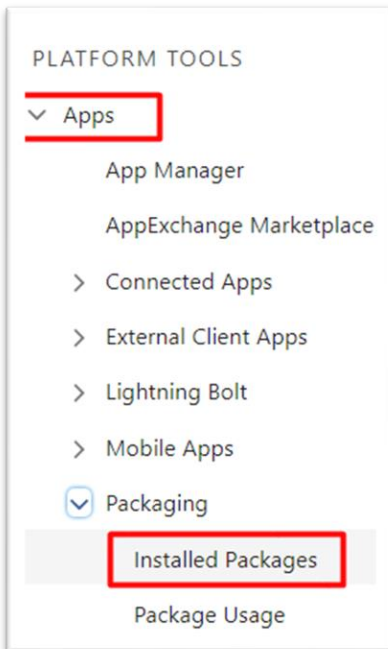


2. Enable Lightning Web Security:
 - a. In Session Settings, find the section "Lightning Web Security" and then click on the checkbox labeled – "Use Lightning Web Security for Lightning web components and Aura components."

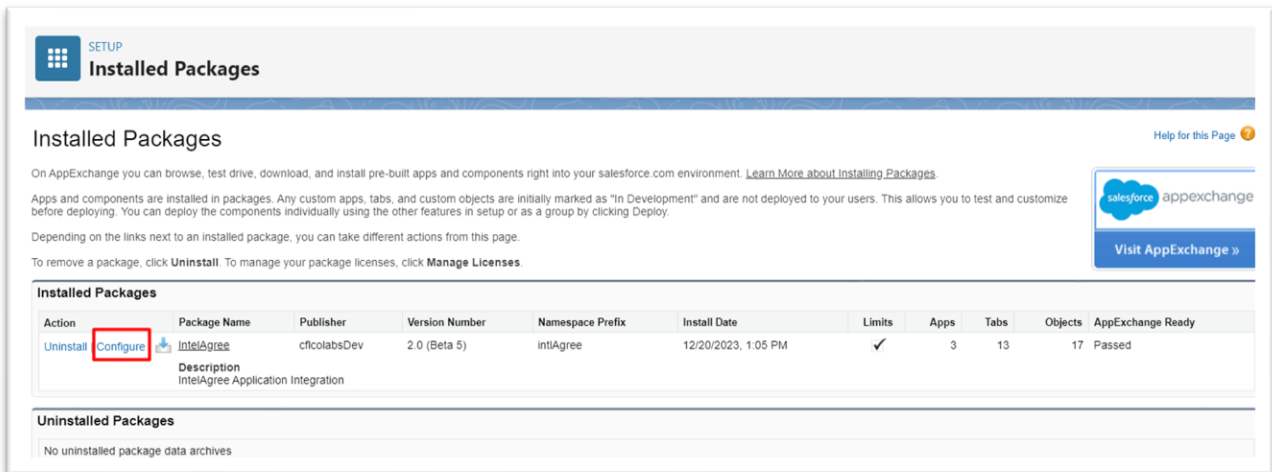
Configure API Settings:

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.”



SETUP
Installed Packages

Installed Packages Help for this Page

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	IntelAgree	cticolabsDev	2.0 (Beta 5)	IntlAgree	12/20/2023, 1:05 PM	✓	3	13	17	Passed
Description IntelAgree Application Integration										

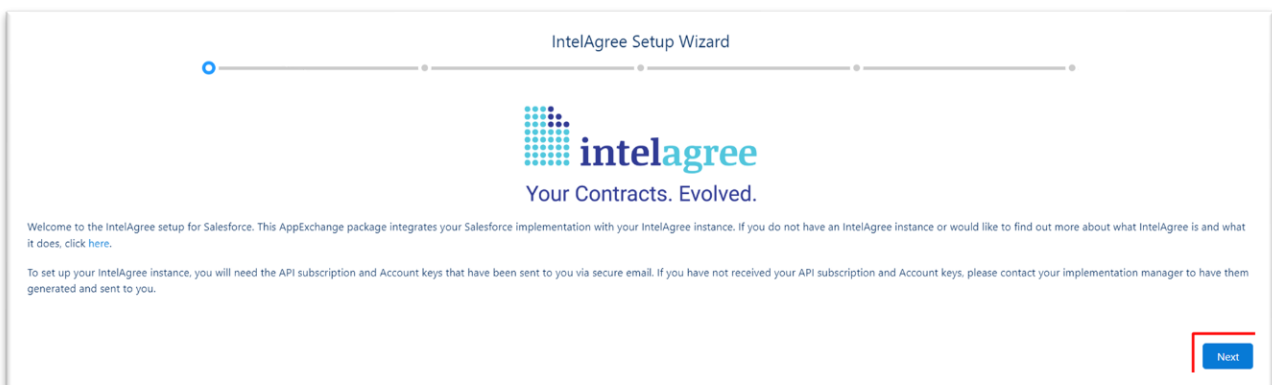
Uninstalled Packages

No uninstalled package data archives


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."



IntelAgree Setup Wizard

 **intelagree**
Your Contracts. Evolved.

Welcome to the IntelAgree setup for Salesforce. This AppExchange package integrates your Salesforce implementation with your IntelAgree instance. If you do not have an IntelAgree instance or would like to find out more about what IntelAgree is and what it does, [click here](#).

To set up your IntelAgree instance, you will need the API subscription and Account keys that have been sent to you via secure email. If you have not received your API subscription and Account keys, please contact your implementation manager to have them generated and sent to you.

[Next](#)

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.



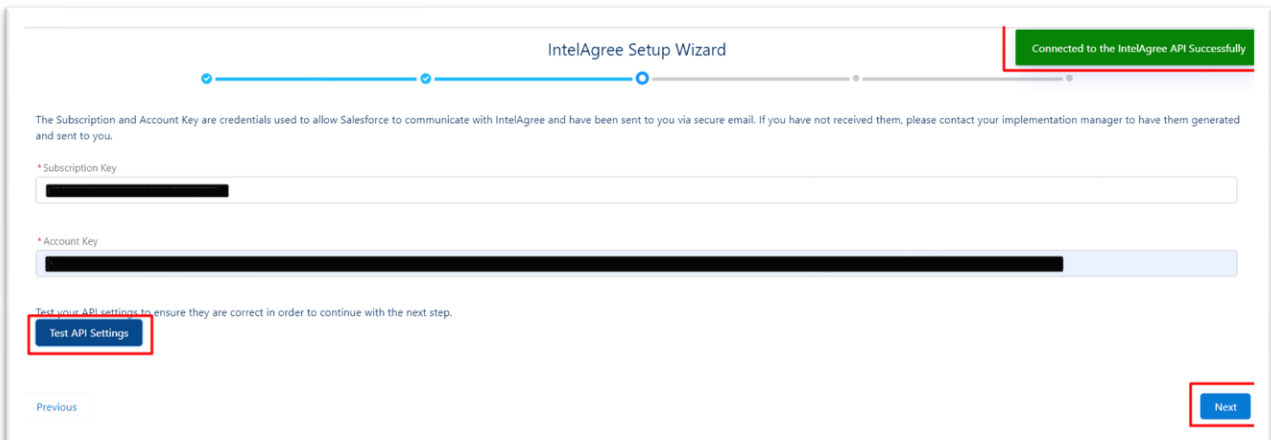
The screenshot shows the "IntelAgree Setup Wizard" interface. At the top, there is a progress bar with four steps, the second of which is active. Below the progress bar, a text block explains that the API Base and IntelAgree URL are used for integration with Salesforce. Two input fields are present: "* API Base URL" with the value "https://apim.intelagree.com/api/" and "* IntelAgree URL" with the value "https://prod.intelagree.com/Contract/". Both fields are highlighted with red boxes. At the bottom left is a "Previous" button, and at the bottom right is a "Next" button, also highlighted with a red box.

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:

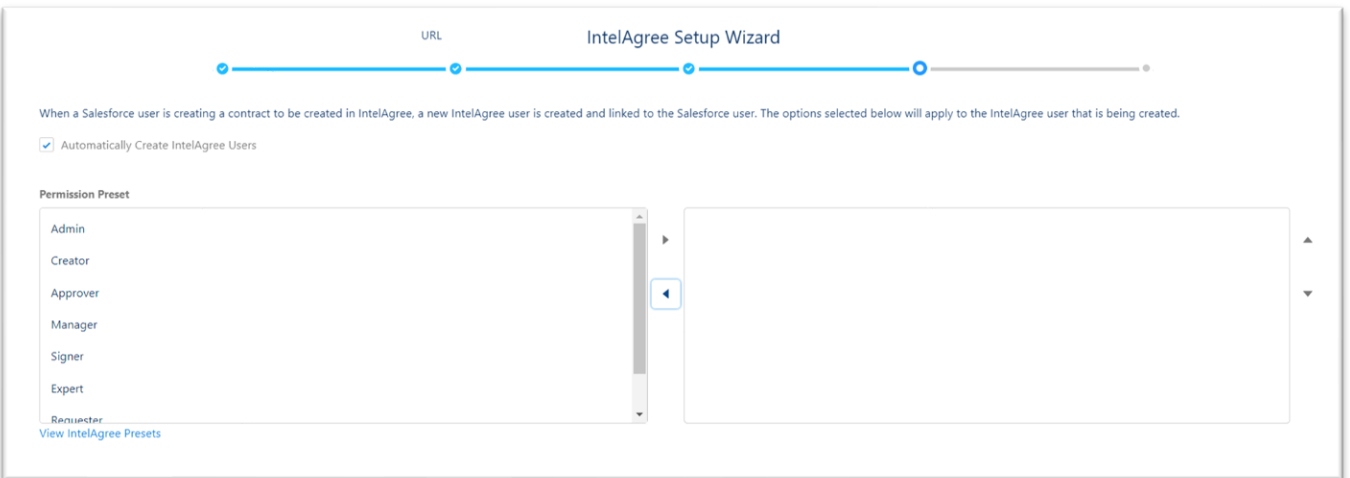
- a. Click the "Test API Settings" button to verify the accuracy of the provided information and establish a successful connection.
- b. Once a successful connection has been made, a "Next" button will appear on the bottom right of the page. Click this button to continue through the wizard.



The screenshot shows the "IntelAgree Setup Wizard" interface. At the top, there is a progress bar with four steps, the third of which is active. A green notification box in the top right corner states "Connected to the IntelAgree API Successfully". Below the progress bar, a text block explains that the Subscription and Account Key are credentials used for communication with IntelAgree. Two input fields are present: "* Subscription Key" and "* Account Key", both containing redacted values. Below the input fields, a text block instructs the user to "Test your API settings to ensure they are correct in order to continue with the next step." A "Test API Settings" button is highlighted with a red box. At the bottom left is a "Previous" button, and at the bottom right is a "Next" button, also highlighted with a red box.

5. **Configure User Creation and Permissions:**

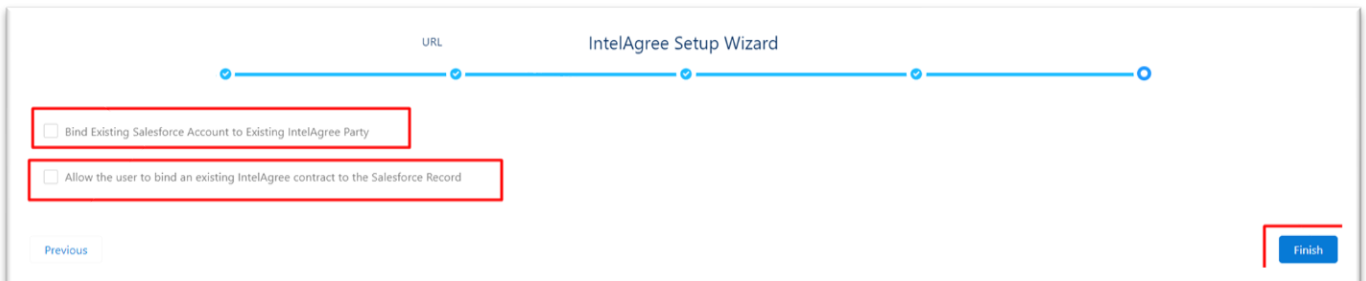
- a. The following page allows you to configure whether IntelAgree users are automatically created and grants admin control over permissions for new users.
 - i. If you prefer not to automatically create IntelAgree users, uncheck the "Automatically Create IntelAgree Users" checkbox (enabled by default).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



The screenshot shows the "IntelAgree Setup Wizard" interface. At the top, there is a progress bar with four steps, the second of which is active. Below the progress bar, a URL is displayed. The main content area contains a checkbox labeled "Automatically Create IntelAgree Users" which is checked. Below this is a "Permission Preset" section with a list of roles: Admin, Creator, Approver, Manager, Signer, Expert, and Revaluator. A "View IntelAgree Presets" link is located at the bottom left of the list. To the right of the list is an empty box for selecting a preset, with navigation arrows.

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.



The screenshot shows the 'IntelAgree Setup Wizard' with a progress bar at the top. Below the progress bar, there are two checkboxes, each enclosed in a red rectangular box:

- Bind Existing Salesforce Account to Existing IntelAgree Party
- Allow the user to bind an existing IntelAgree contract to the Salesforce Record

At the bottom left, there is a 'Previous' link, and at the bottom right, there is a 'Finish' button.

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.



The screenshot shows the 'API Settings' page with a dropdown menu expanded to show the following fields:

- API Base URL:**
- IntelAgree URL:**
- Subscription Key:**
- Account Key:**

At the bottom of the form, there is a blue button labeled 'Test API Settings'.

- **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.

▼ User Settings

Automatically Create IntelAgree Users

Create Users Using...

Manual Select | Permission Preset | Clone Existing User's Permissions

* Default IntelAgree Organizations

2 Option(s) Selected

Cornell Staffing, Inc. X | Cornell MSP, LLC X

* Default Permissions

5 Option(s) Selected

View Contract X | Create Contract X | Import Contract X | Upload Contract X | Create Request X

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

▼ Account Settings

Name	Account Name	Alias	Select an Option
Street	Billing Street	City	Billing City
State	Billing State/Province	Postal Code	Billing Zip/Postal Code
Country	Billing Country	Legal Description	Select an Option

- **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.

▼ Create Contract Wizard Settings - (V2 Only)

<input checked="" type="checkbox"/> Allow the user to add attachments to the Contract	<input checked="" type="checkbox"/> Allow the user to add attachments to the Contract Request
<input checked="" type="checkbox"/> Show Contract Signing Order	<input checked="" type="checkbox"/> Show Comments
<input checked="" type="checkbox"/> Show Effective Date	<input checked="" type="checkbox"/> Show Expiration Date
<input checked="" type="checkbox"/> Show Contract Signers	<input checked="" type="checkbox"/> Show Non-Signing Recipients
<input checked="" type="checkbox"/> Show Request Due Date	<input checked="" type="checkbox"/> Show Submit for Signing
<input checked="" type="checkbox"/> Show Contract Creation Summary Page	<input checked="" type="checkbox"/> Show Non Permissible Fields ⓘ
<input type="checkbox"/> Create Contract in Draft State	

- **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.

▼ Other Settings

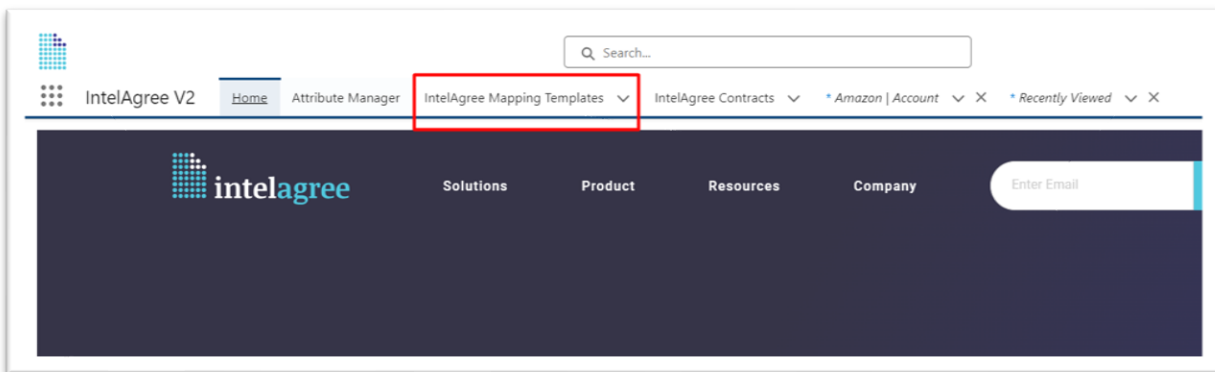
<input checked="" type="checkbox"/> Allow Salesforce Records to be Bound to Existing IntelAgree Contracts
<input checked="" type="checkbox"/> Bind Existing Salesforce Account to Existing IntelAgree Party

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:

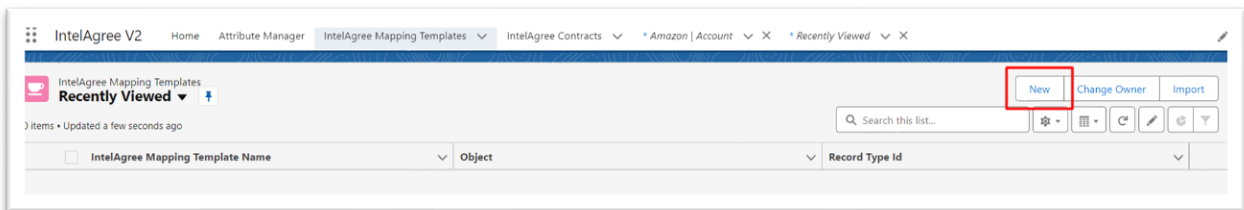
1. Access IntelAgree V2 Setup:

- a. Navigate to IntelAgree V2 Setup and click on the "IntelAgree Mapping Template" tab.



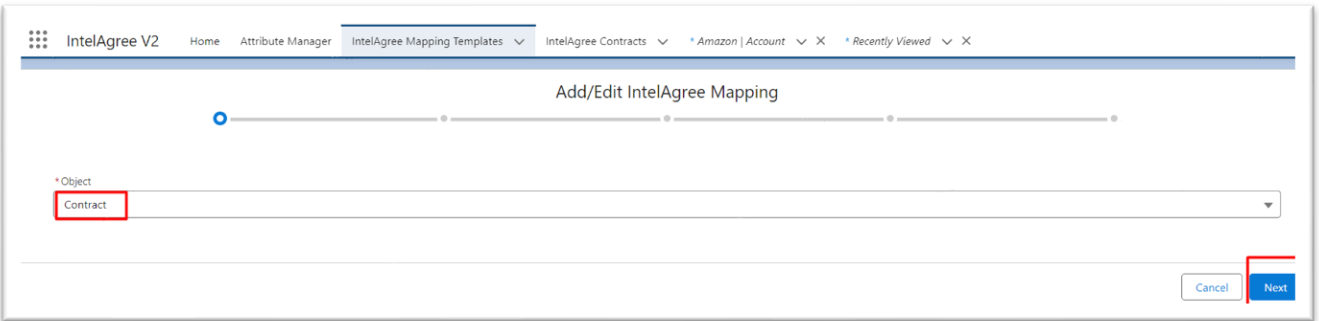
2. Create a New Mapping Template:

- 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.)



IntelAgree V2 Home Attribute Manager IntelAgree Mapping Templates IntelAgree Contracts Amazon | Account Recently Viewed

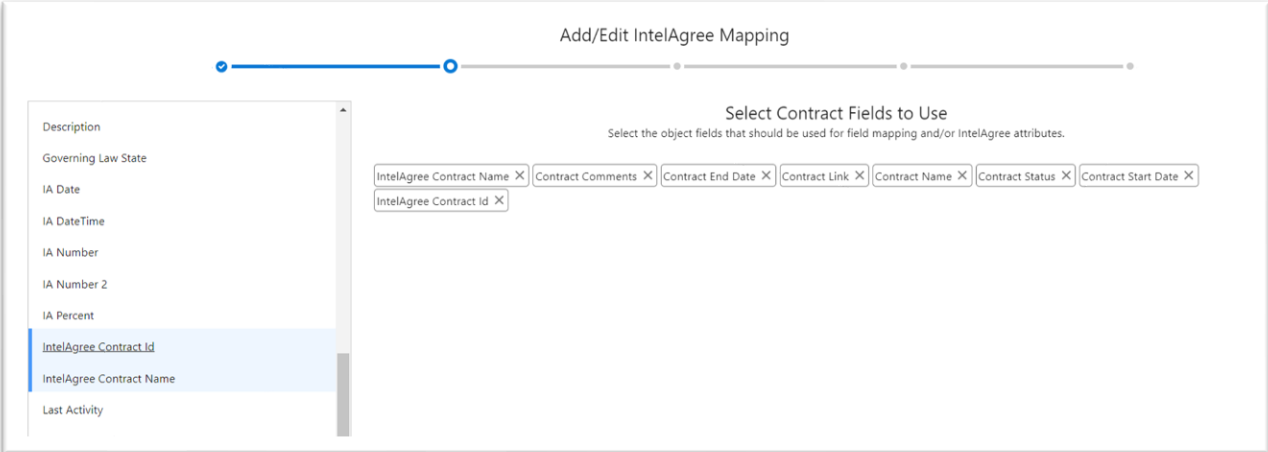
Add/Edit IntelAgree Mapping

* Object
Contract

Cancel Next

4. Select Object Fields for Mapping:

- 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.



Add/Edit IntelAgree Mapping

Select Contract Fields to Use

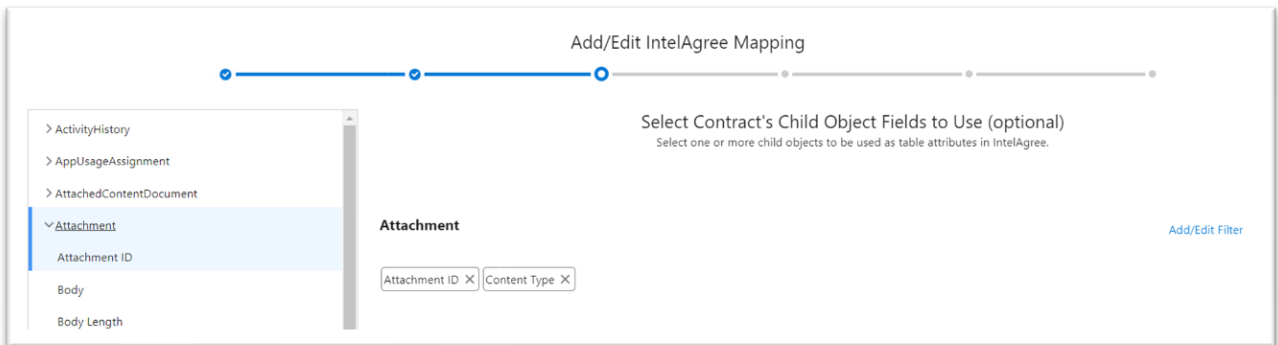
Select the object fields that should be used for field mapping and/or IntelAgree attributes.

IntelAgree Contract Name X Contract Comments X Contract End Date X Contract Link X Contract Name X Contract Status X Contract Start Date X
IntelAgree Contract Id X

- Description
- Governing Law State
- IA Date
- IA DateTime
- IA Number
- IA Number 2
- IA Percent
- IntelAgree Contract Id
- IntelAgree Contract Name
- Last Activity

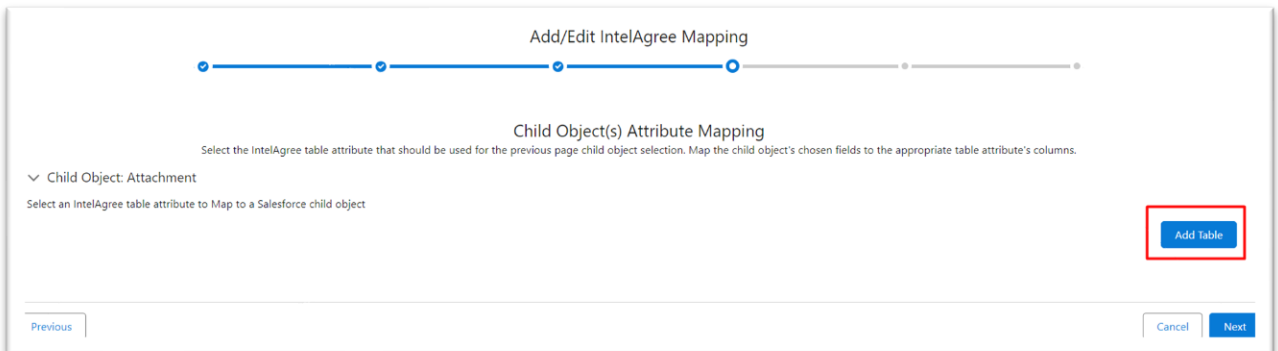
5. Select Child Objects (Optional):

- Choose one or more child objects for table attributes in IntelAgree. Click "Next" to proceed.



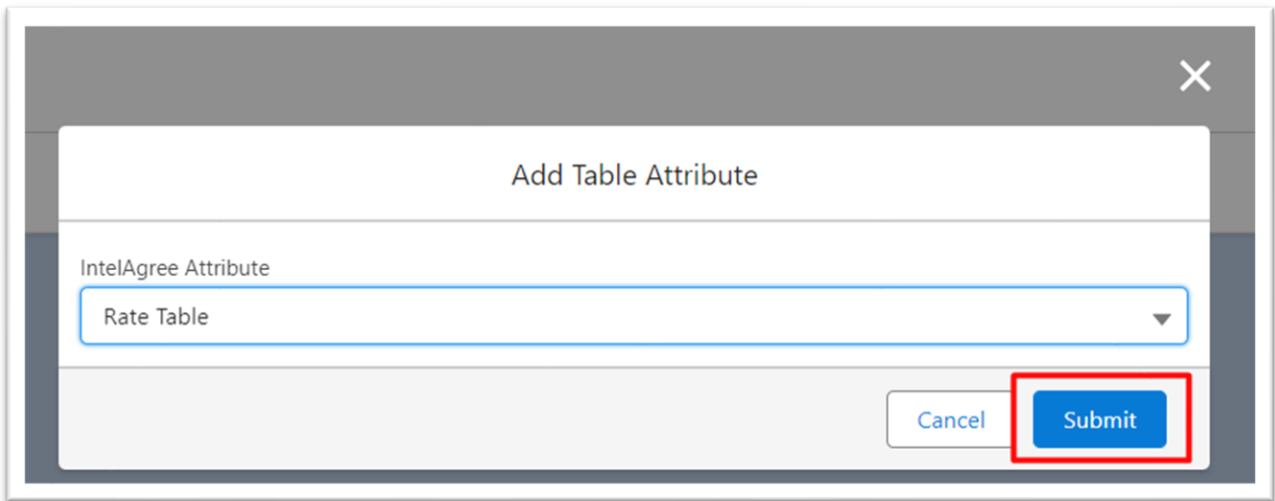
6. Add Table and Map Fields:

- 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.



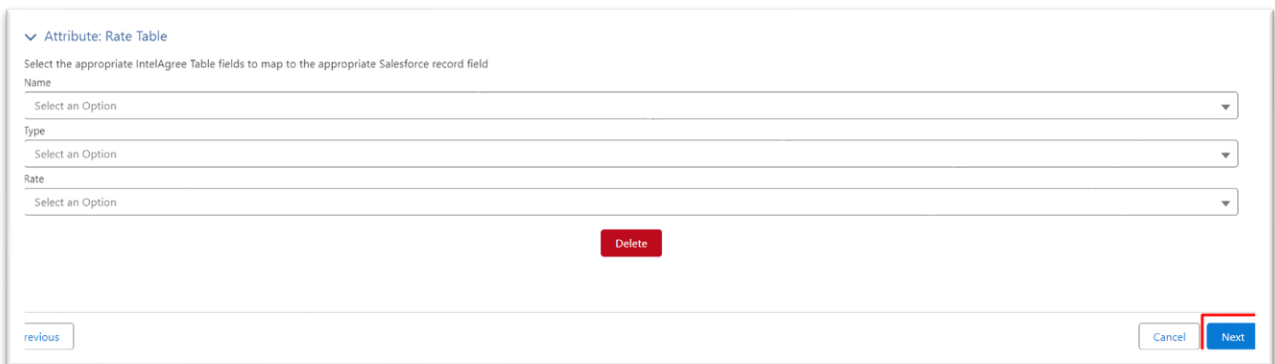
7. Select IntelAgree Table Attribute:

- 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.

Add/Edit IntelAgree Mapping

Salesforce Object Field Value Mapping
(Optional) Select which object selected fields should prepopulate the IntelAgree contract creation application.

↕ Send/Receive Fields

Name IntelAgree Contract Name	Effective Date Contract Start Date
Expiration Date Select an Option	

▲ Send Only Fields

Comments Contract Comments	Request Due Date Select an Option
-------------------------------	--------------------------------------

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

Select an Option	Select an Option
Contract Id IntelAgree Contract Id	Contract Url sysContractLink
Contract Status Contract Status	Create Error Message Contract Create Error
Contract Sub Status Select an Option	

Other Fields

- Download Executed Contract
- Enable Multiple Contracts per One Object Record

Previous Cancel **Next**

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.



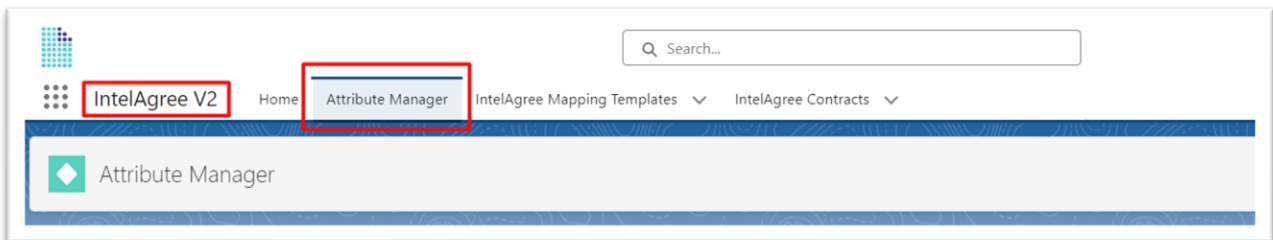
IntelAgree Mapping Template Name	Object	Record Type Id
IMT-0	Contract	

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:

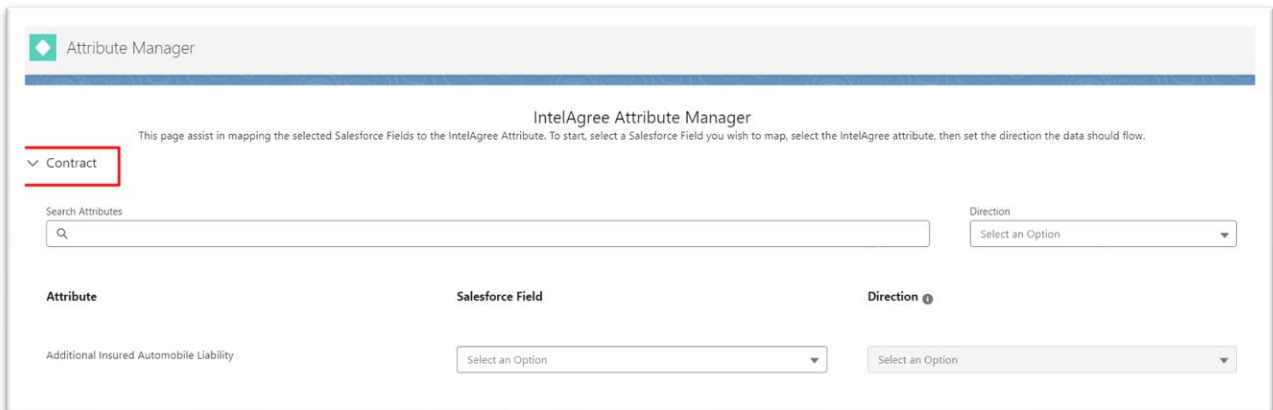
1. Access the Attribute Manager:

- 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.



Attribute Manager

IntelAgree Attribute Manager
This page assist in mapping the selected Salesforce Fields to the IntelAgree Attribute. To start, select a Salesforce Field you wish to map, select the IntelAgree attribute, then set the direction the data should flow.

▼ Contract

Search Attributes Direction

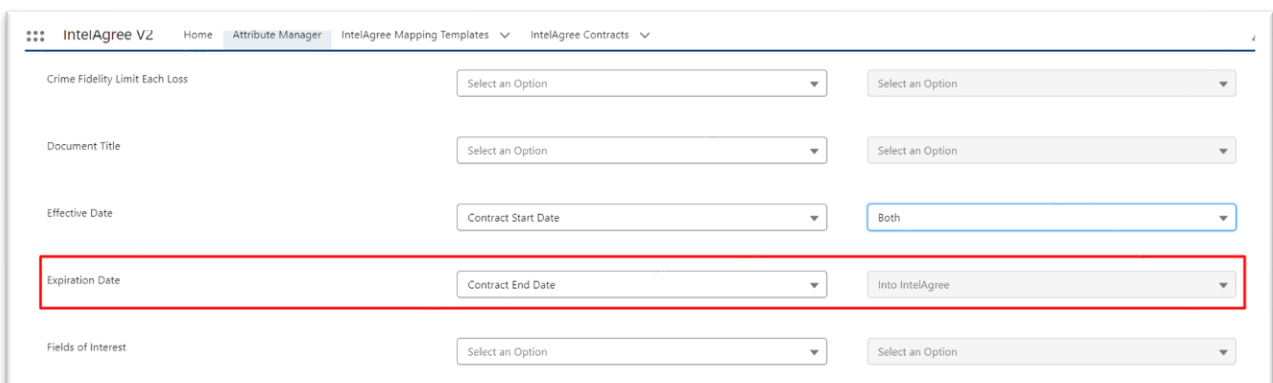
Attribute	Salesforce Field	Direction
Additional Insured Automobile Liability	<input type="text" value="Select an Option"/>	<input type="text" value="Select an Option"/>

3. Select Salesforce Field:

- 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:

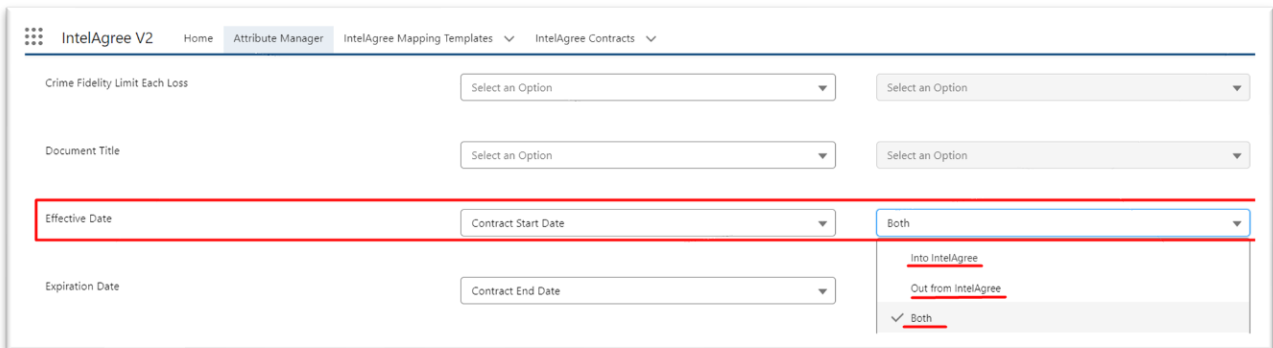
- After selecting the Salesforce field, the "Direction" field will auto-populate based on the chosen field.
 - If the field is inbound or outbound only, the selection will prepopulate, and the admin cannot update it.



IntelAgree V2 Home Attribute Manager IntelAgree Mapping Templates IntelAgree Contracts

Crime Fidelity Limit Each Loss	<input type="text" value="Select an Option"/>	<input type="text" value="Select an Option"/>
Document Title	<input type="text" value="Select an Option"/>	<input type="text" value="Select an Option"/>
Effective Date	<input type="text" value="Contract Start Date"/>	<input type="text" value="Both"/>
Expiration Date	<input type="text" value="Contract End Date"/>	<input type="text" value="Into IntelAgree"/>
Fields of Interest	<input type="text" value="Select an Option"/>	<input type="text" value="Select an Option"/>

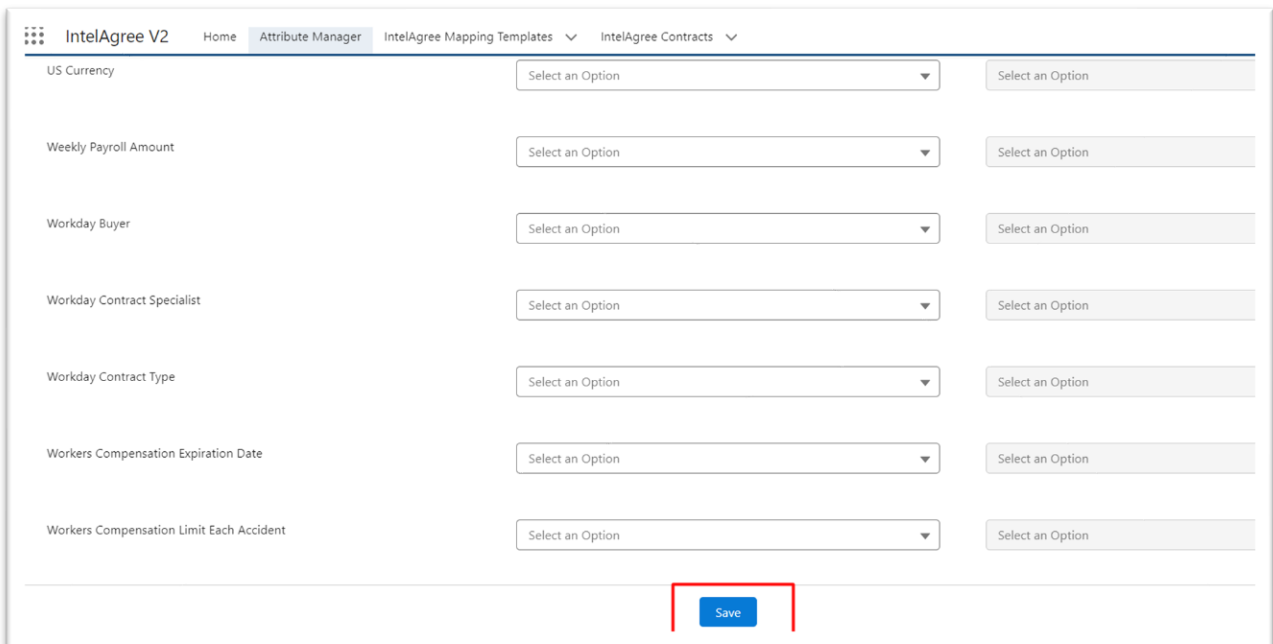
- If the field is dynamic and can be both inbound and outbound, the "Direction" field becomes editable, defaulting to "Both," but the admin can change it to inbound or outbound if desired.



The screenshot shows the IntelAgree V2 Attribute Manager interface. The breadcrumb trail is: IntelAgree V2 > Home > Attribute Manager > IntelAgree Mapping Templates > IntelAgree Contracts. The interface displays a table of attribute mappings. The 'Effective Date' row is highlighted with a red border. In this row, the 'Contract Start Date' dropdown is selected, and the direction dropdown is set to 'Both'. The 'Expiration Date' row shows the 'Contract End Date' dropdown selected, with the direction dropdown set to 'Both'. The direction dropdown menu is open, showing options: 'Into IntelAgree', 'Out from IntelAgree', and 'Both' (which is selected).

5. Save Mapping:

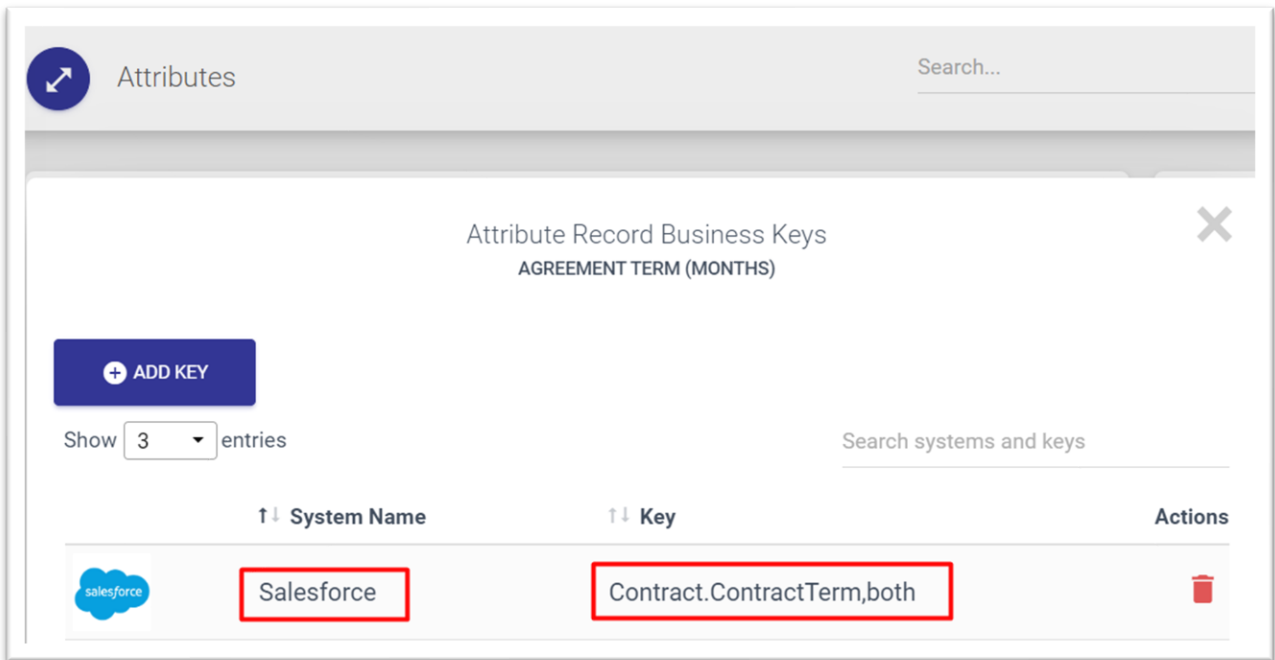
- After mapping all desired attributes, click "Save" to confirm the field mappings.
- Note: when upgrading from V1 to V2 all existing attributes will be populated so the only action that is needed is to click "Save" to update all existing attributes to the new V2 Business Key format.



The screenshot shows the IntelAgree V2 Attribute Manager interface with a list of attributes. The breadcrumb trail is: IntelAgree V2 > Home > Attribute Manager > IntelAgree Mapping Templates > IntelAgree Contracts. The list includes attributes such as 'US Currency', 'Weekly Payroll Amount', 'Workday Buyer', 'Workday Contract Specialist', 'Workday Contract Type', 'Workers Compensation Expiration Date', and 'Workers Compensation Limit Each Accident'. Each attribute has a 'Select an Option' dropdown menu. At the bottom center of the interface, a blue 'Save' button is highlighted with a red border.

6. Verify Attribute in IntelAgree:

- 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.

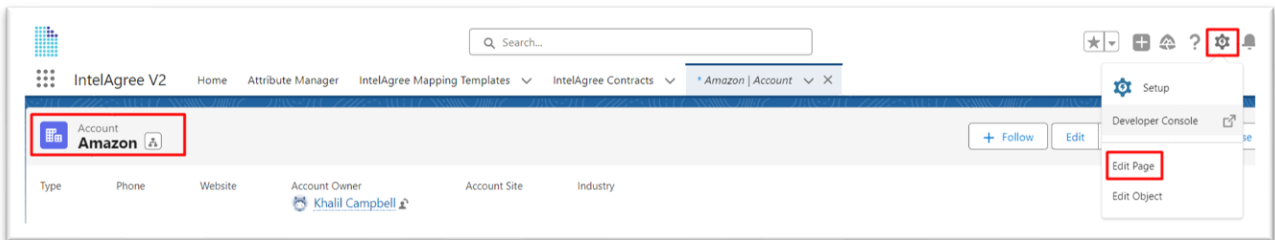
- Contracts List By Party
- Contracts Related to Object

Contracts List By Party:

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

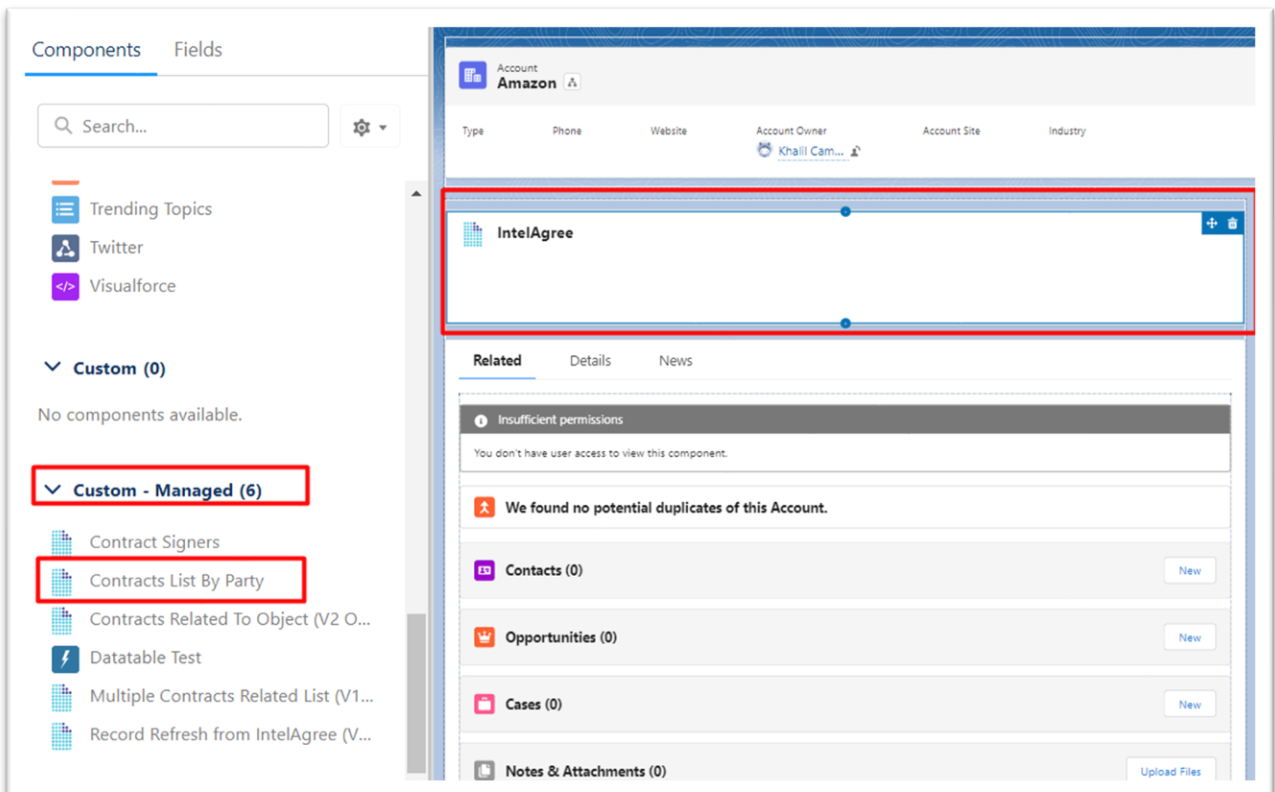
1. Navigate to the Object:

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



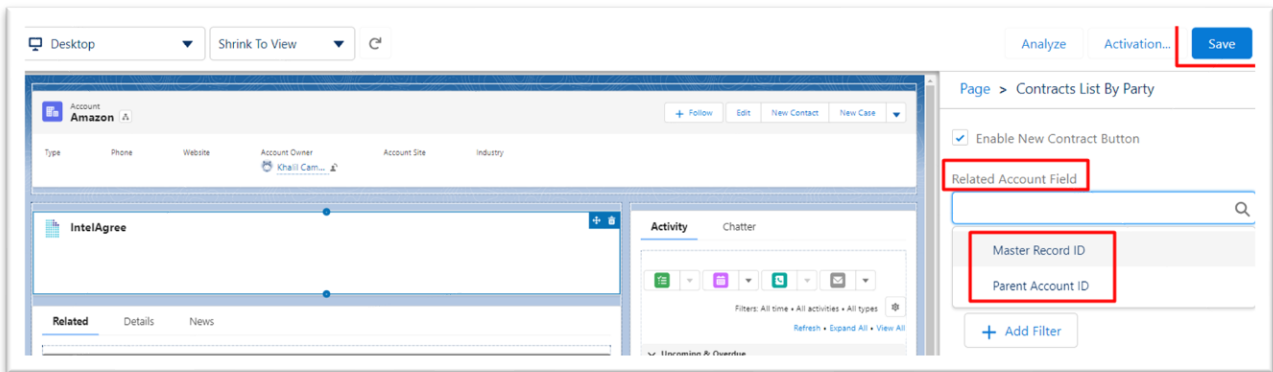
2. Locate and Add Lightning Component:

- 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.



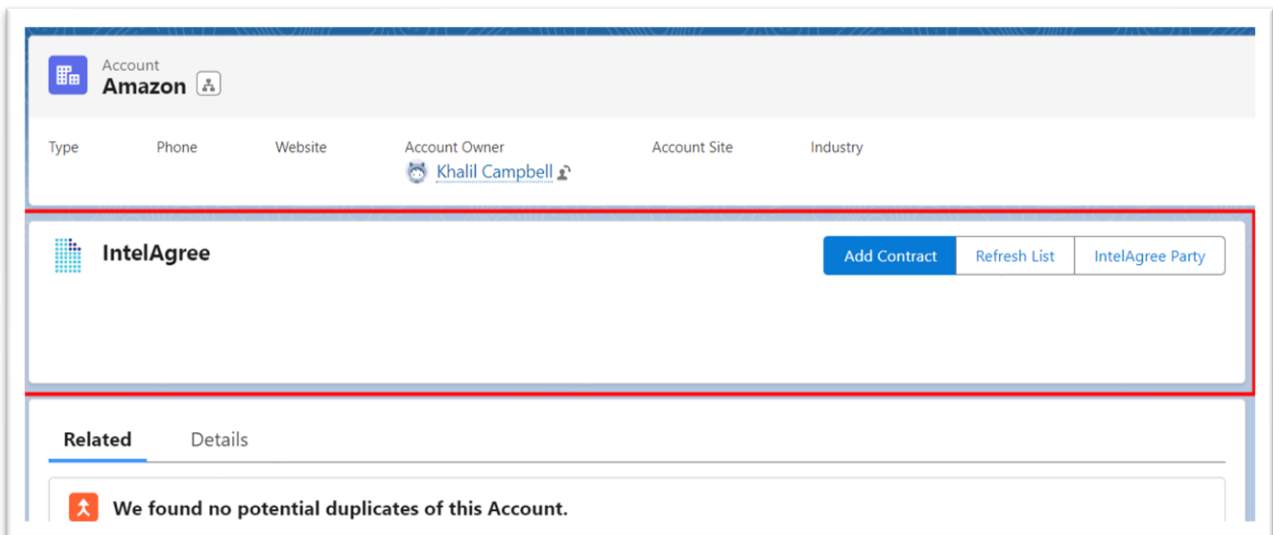
3. Configure Component Settings:

- 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."



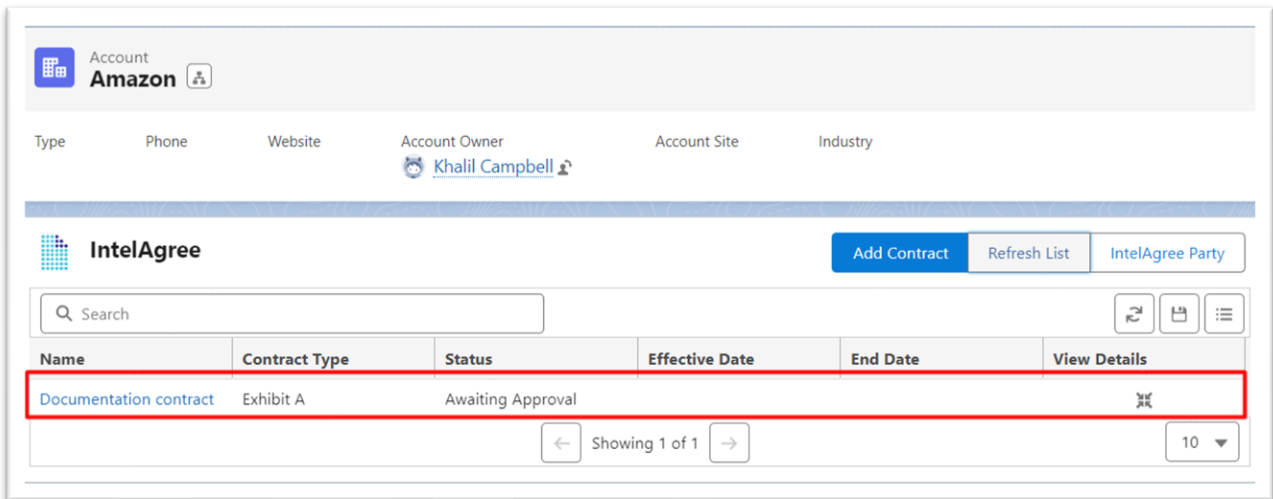
4. Confirm Component Addition:

- 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:

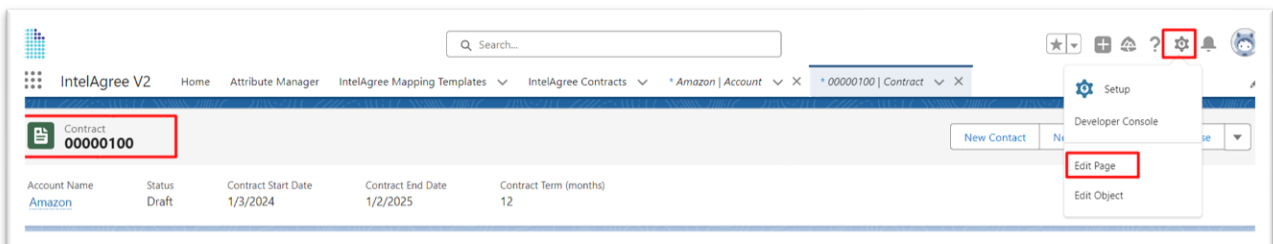
- a. If the component is present but does not display any data, confirm in IntelAgree that a Business Key connection has been established between IntelAgree Party and Salesforce Account, and that the Party has associated contracts.



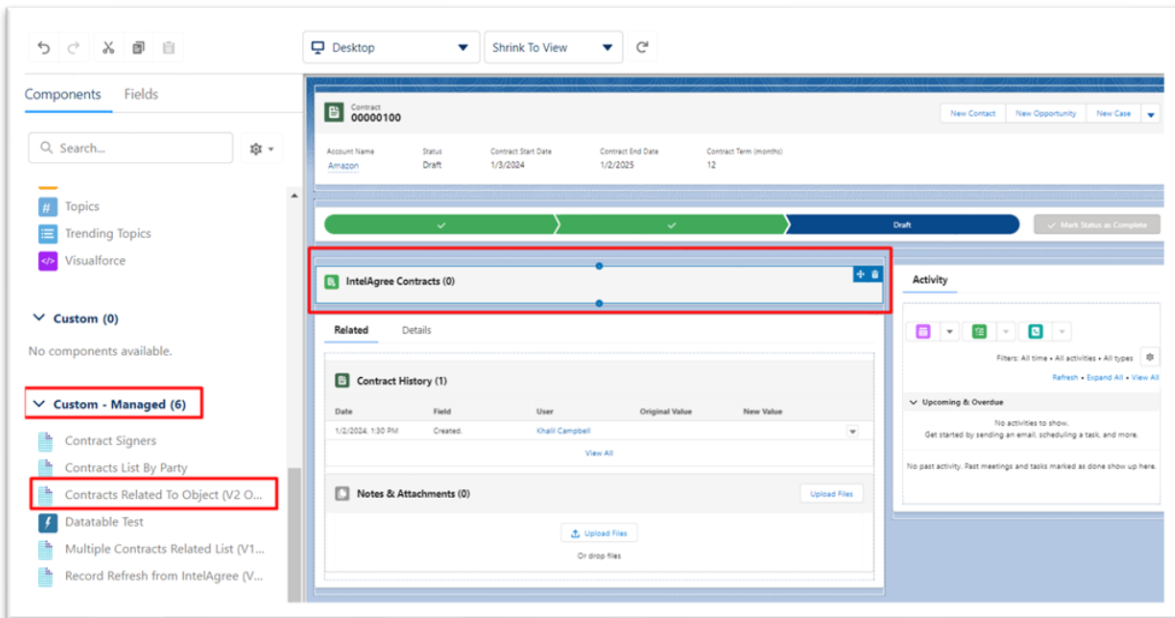
Contracts Related to Object:

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:

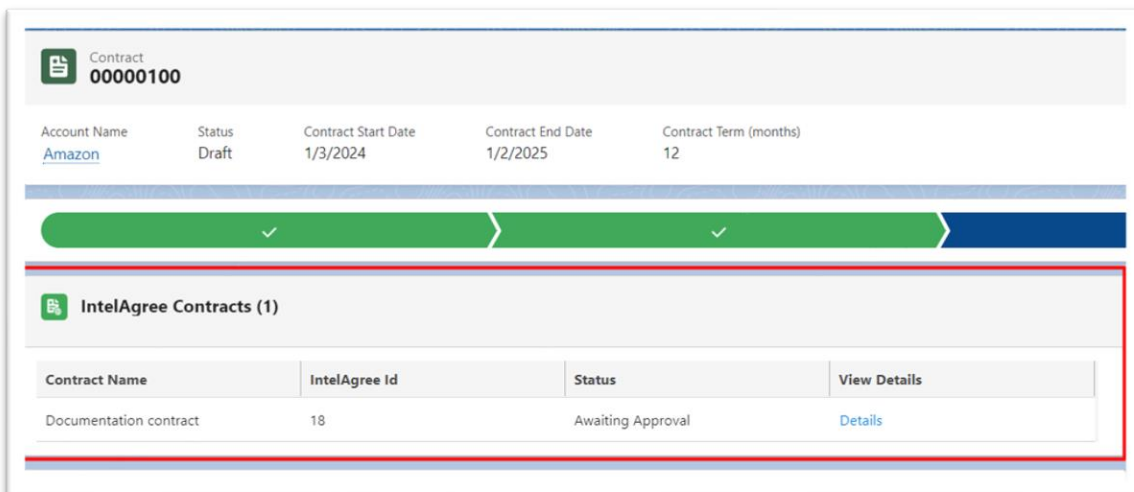
1. Navigate to Salesforce Object:
 - a. Go to a Salesforce object that has a lookup to the account. Click on the "Setup" cogwheel and select "Edit Page."



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 providing the user specific actions such as:

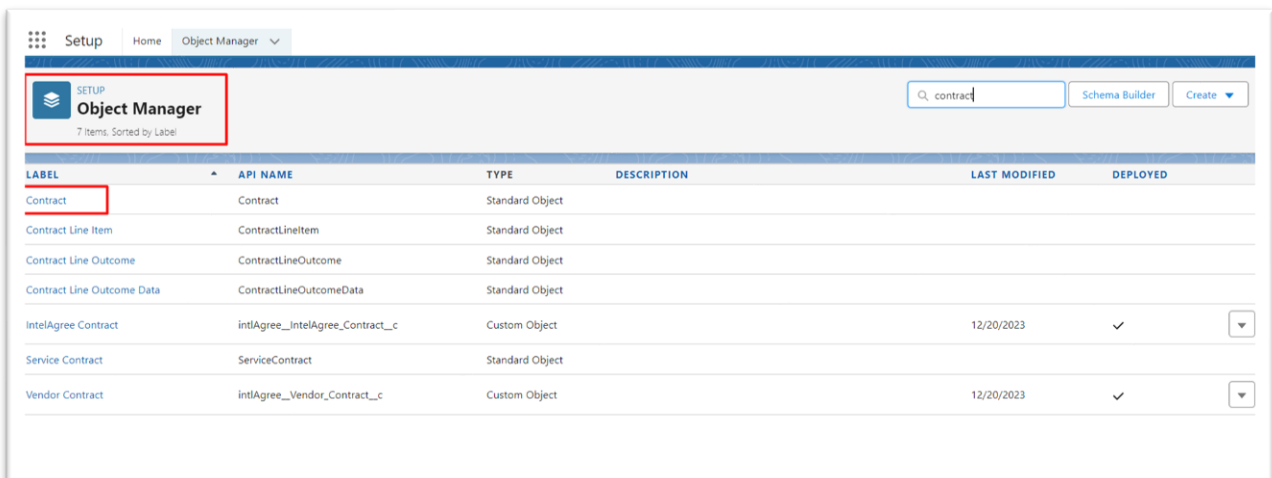
- Creating a new IntelAgree contract
- Binding an existing IntelAgree contract
- Viewing the contract details.

"Create New Contract V2" Action Button:

The "Create New Contract" 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.).

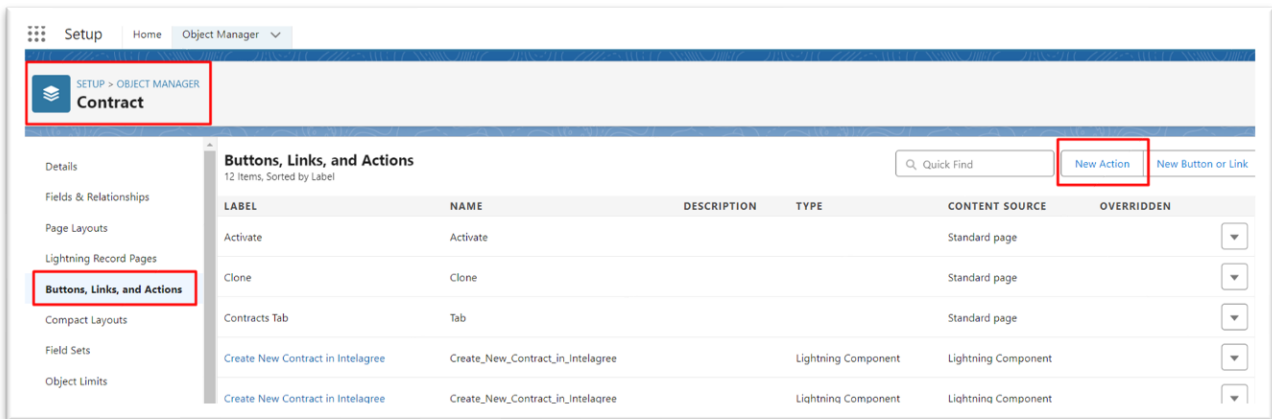


The screenshot shows the Salesforce Object Manager interface. The 'Object Manager' tab is selected, and a search filter 'contract' is applied. The table below lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Contract	Contract	Standard Object			
Contract Line Item	ContractLineItem	Standard Object			
Contract Line Outcome	ContractLineOutcome	Standard Object			
Contract Line Outcome Data	ContractLineOutcomeData	Standard Object			
IntelAgree Contract	intlAgree__IntelAgree_Contract__c	Custom Object		12/20/2023	✓
Service Contract	ServiceContract	Standard Object			
Vendor Contract	intlAgree__Vendor_Contract__c	Custom Object		12/20/2023	✓

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:
- Action Type: Lightning Component
 - Lightning Component: intlAgree>CreateNewContractV2
 - Height: 250px
 - Standard Label Type: None
 - Label: Create Contract in IntelAgree (or customize as needed)
 - Name: (auto-populated from the Label)
 - Description: (user discretion)

Contract Actions
New Action

Enter Action Information Save Cancel

Object Name	Contract i
Action Type	Lightning Component
Lightning Component	intlAgree:CreateNewContractV2 i
Height	250px i
Standard Label Type	--None-- i
Label	Create Contract in IntelAgre
Name	Create_Contract_in_IntelAg i
Description	<input type="text"/> i

Icon  [Change Icon](#)

Save Cancel

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).

SETUP > OBJECT MANAGER
Contract

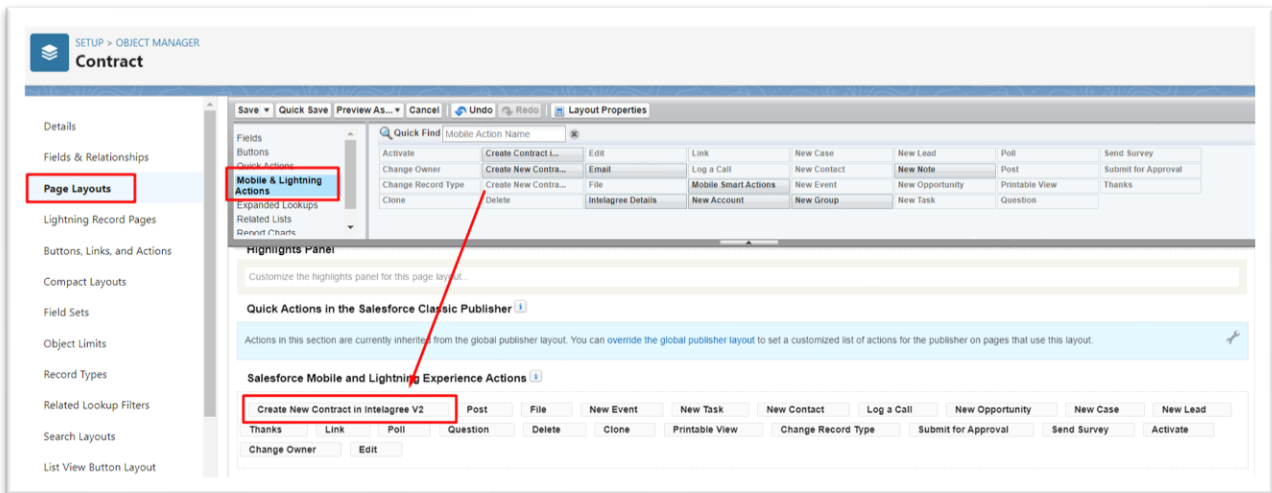
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions

Page Layouts
2 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Contract Layout	User User, 12/18/2023, 11:25 AM	User User, 12/18/2023, 11:25 AM	▼
IntelAgree Contract Layout	Khalil Campbell, 12/20/2023, 1:04 PM	User User, 1/4/2024, 9:37 AM	▼

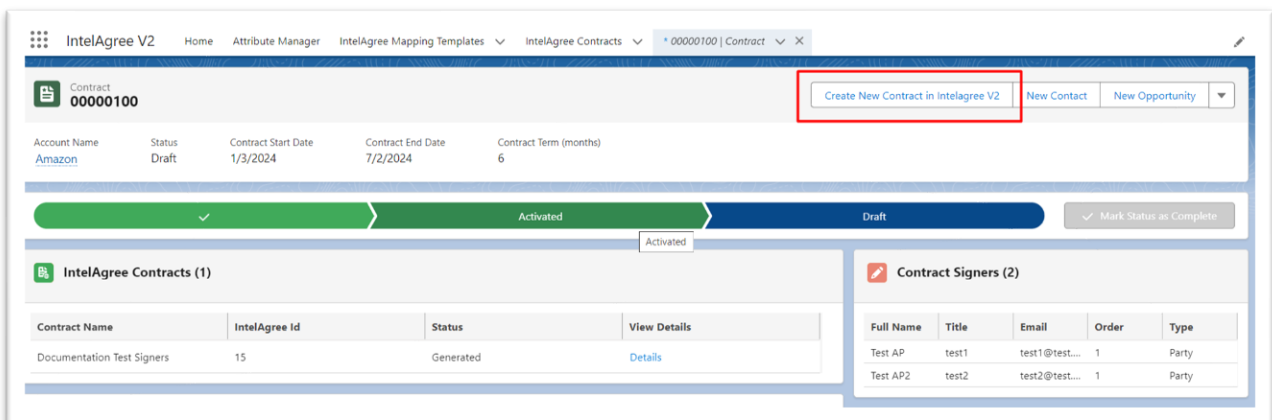
- b. Under "Mobile & Lightning Actions", find the newly created button and drag it into the "Salesforce Mobile and Lightning Experience Actions" section.



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:

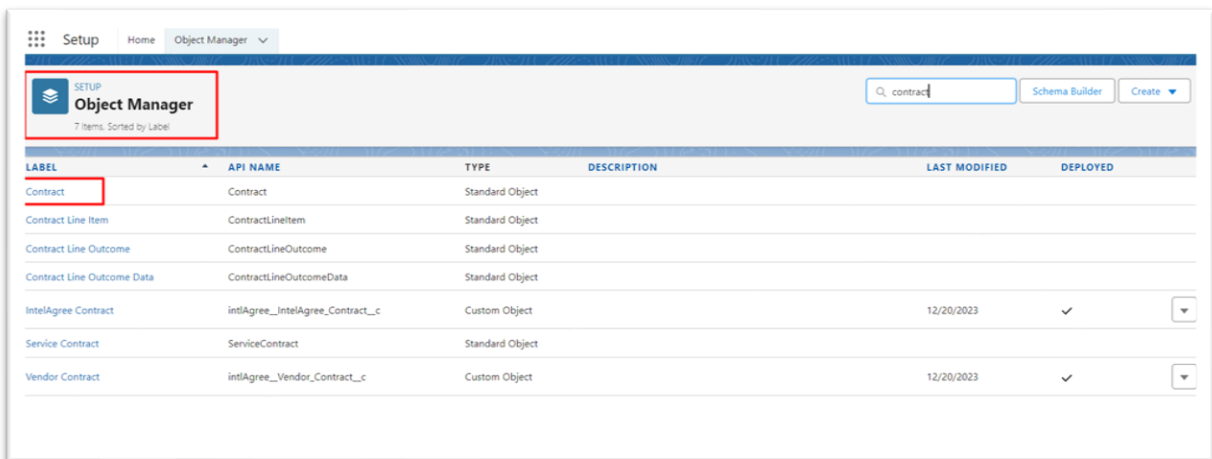
a. After creating a new record, clicking the "Create New Contract in IntelAgree" button will open a new page that will prompt you to provide information to create the contract in IntelAgree.

"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:

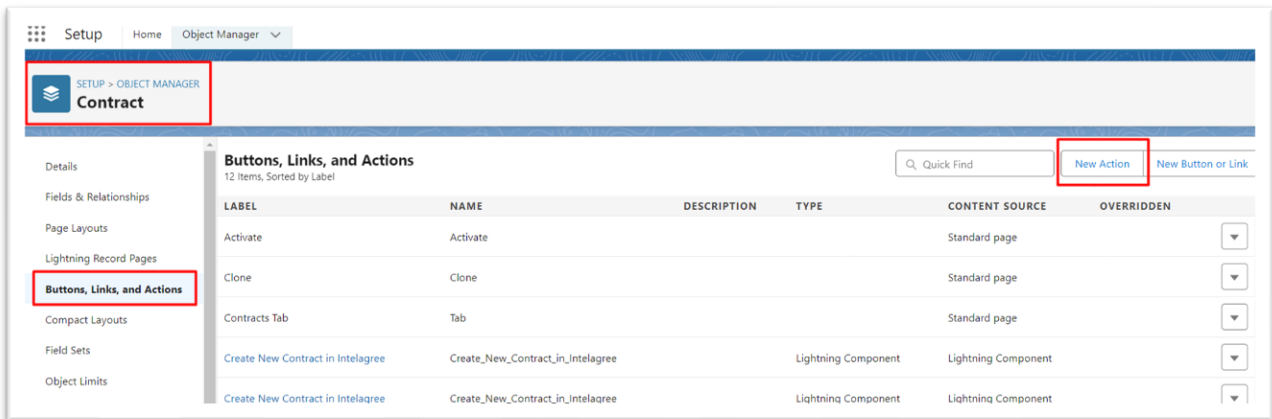
1. Navigate to Object Manager:

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



2. Create New Action:

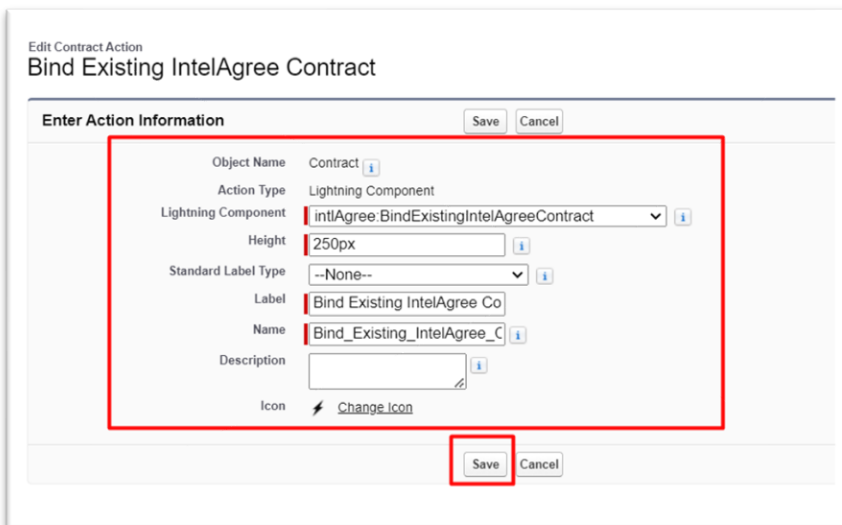
- In the selected object, navigate to "Buttons, Links, and Actions" and click on "New Action."



- 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.



Edit Contract Action
Bind Existing IntelAgree Contract

Enter Action Information Save Cancel

Object Name Contract

Action Type Lightning Component

Lightning Component intlAgree:BindExistingIntelAgreeContract

Height 250px

Standard Label Type --None--

Label Bind Existing IntelAgree Co

Name Bind_Existing_IntelAgree_C

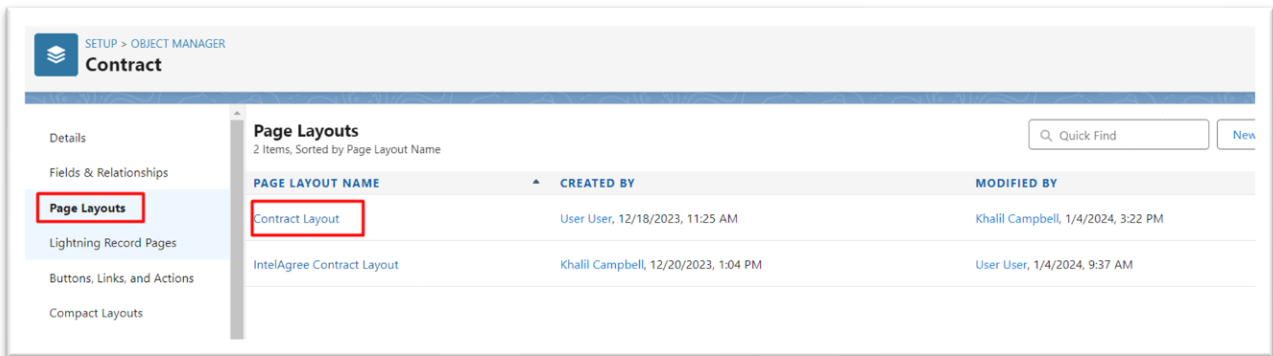
Description

Icon Change Icon

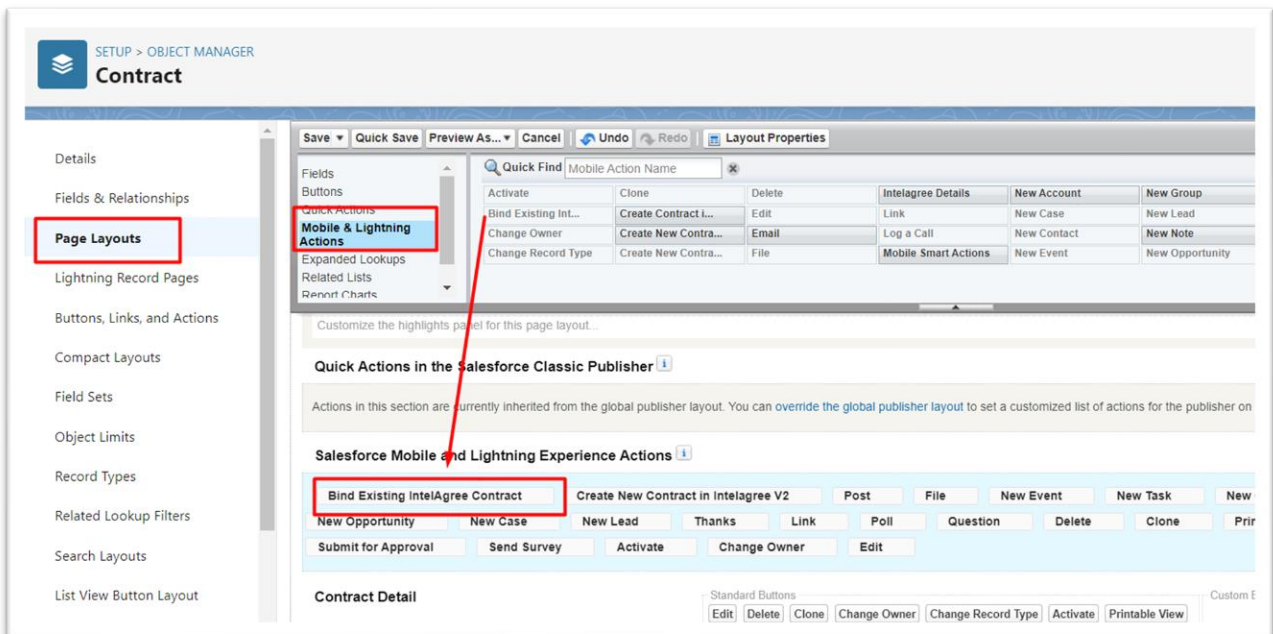
Save Cancel

4. Add Action to Page Layouts:

- a. Navigate to Page Layouts and select the desired page layout(s).

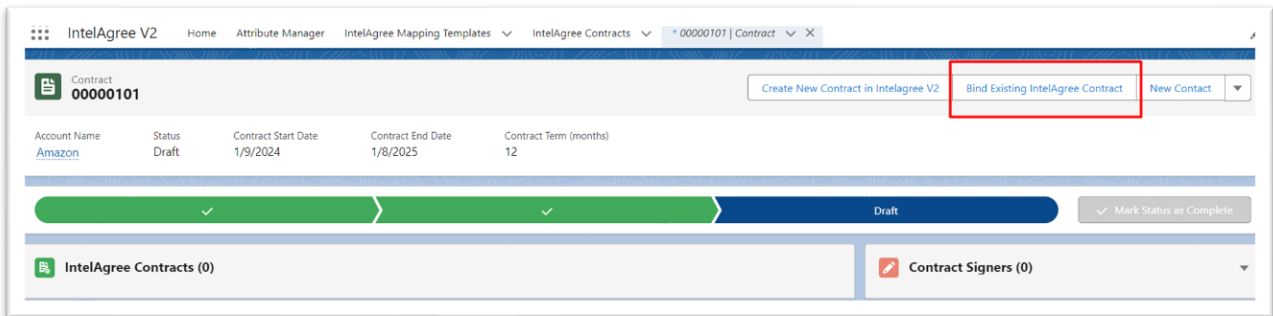


- b. Under Mobile & Lightning Actions, find the newly created button and drag it into the Salesforce Mobile and Lightning Experience Actions section.
- c. Click "Save."



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.

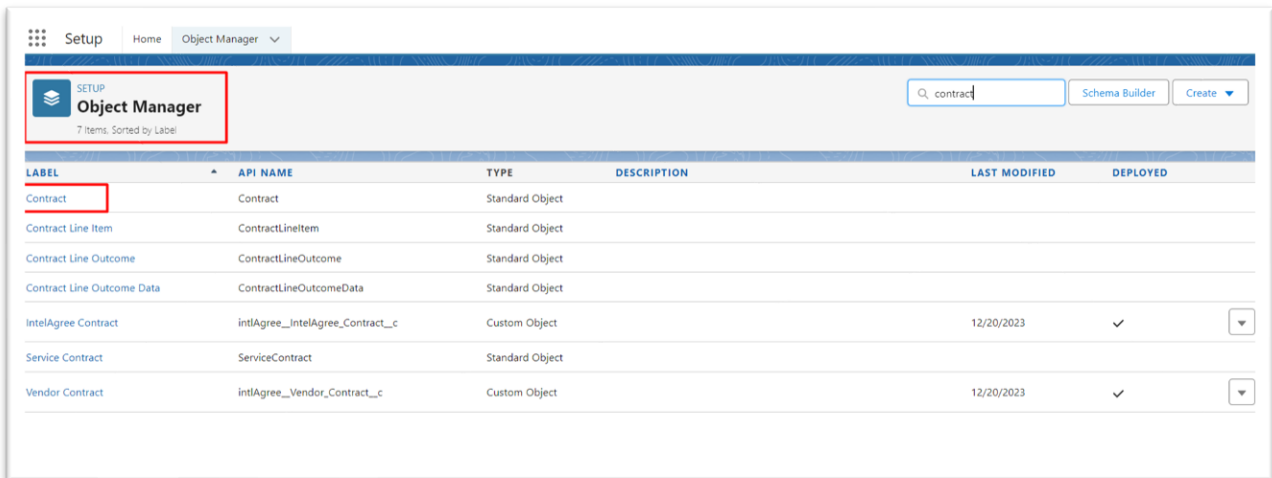
"IntelAgree Contract Details" Action Button:

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:

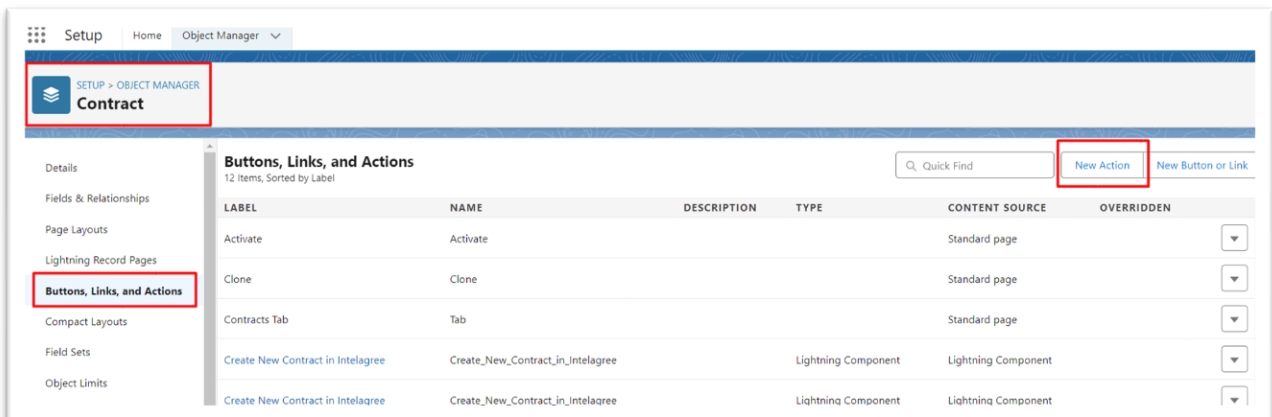
- a. Go to Setup -> Object Manager and select the object you wish to edit (e.g., Contract, Opportunity, etc.).



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Contract	Contract	Standard Object			
Contract Line Item	ContractLineItem	Standard Object			
Contract Line Outcome	ContractLineOutcome	Standard Object			
Contract Line Outcome Data	ContractLineOutcomeData	Standard Object			
IntelAgree Contract	intlAgree__IntelAgree_Contract__c	Custom Object		12/20/2023	✓
Service Contract	ServiceContract	Standard Object			
Vendor Contract	intlAgree__Vendor_Contract__c	Custom Object		12/20/2023	✓

2. Create New Action:

- a. In the selected object, navigate to “Buttons, Links, and Actions” and click on “New Action.”




LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Activate	Activate			Standard page	
Clone	Clone			Standard page	
Contracts Tab	Tab			Standard page	
Create New Contract in Intelagree	Create_New_Contract_in_Intelagree		Lightning Component	Lightning Component	
Create New Contract in Intelagree	Create_New_Contract_in_Intelagree		Lightning Component	Lightning Component	

- 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)

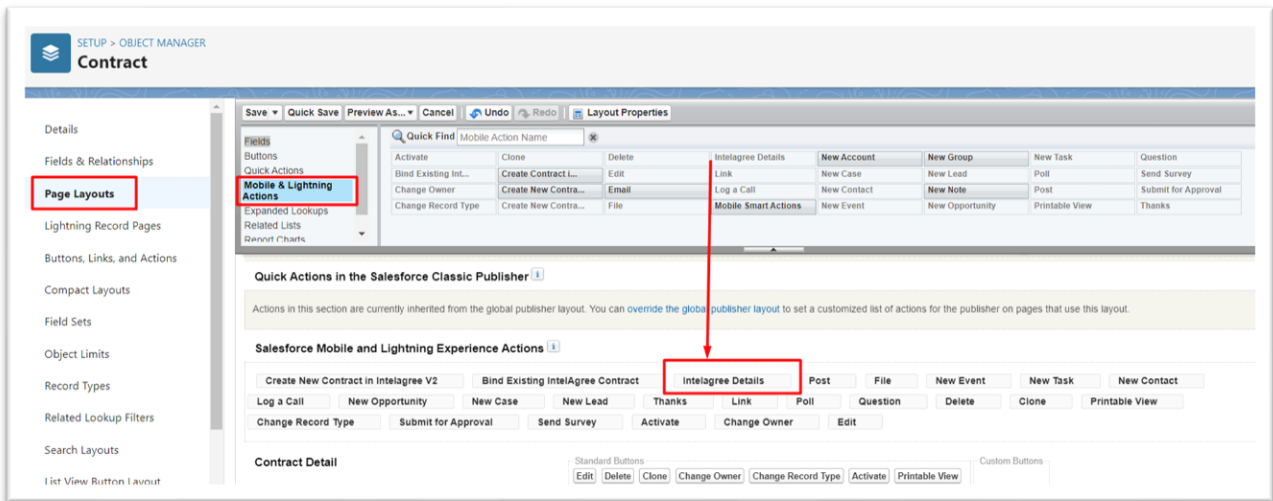
3. **Save the Action:**
 - a. Click "Save" to save the new action.

Enter Action Information Save Cancel

Object Name	Contract i
Namespace Prefix	intlAgree
Installed Package	IntelAgree
Action Type	Lightning Component
Lightning Component	intlAgree:ContractDetailWrapper i
Height	250px i
Standard Label Type	--None-- i
Label	Intelagree Details
Name	Intelagree_Details i
Description	<input type="text"/> i
Icon	

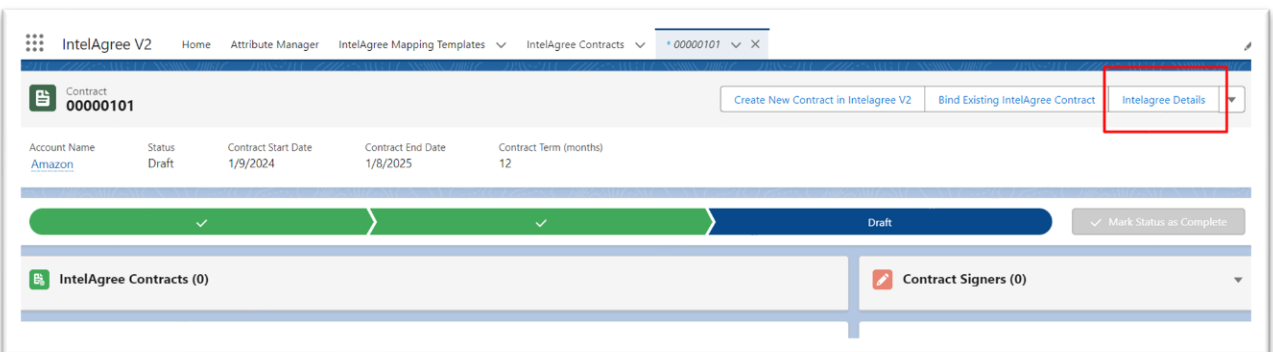
Save Cancel

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.