

INFOSOFT IT SOLUTIONS

Training | Projects | Placements

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Contract Lifecycle Management

Pricing Management

- Price Matrix Terminology
- Creating Price Dimension
- Create condition base price matrix
- How to create a Price Ruleset
- "Creating a Price rule"
- Pricing Callback Class
- Tiered Pricing
- Related Pricing
- Q/A Session

Agreement Administration

- Record Types
- Fields
- Action Section

Process Maintenance

- Document Output Format, Protection, Template
- Selection
- Standard Flow vs Non-Standard Flow

Agreement Creation

- Wizard

Contract Negotiation Process

- Where do Templates fit

Template Administration

- Within Salesforce
- Within MS Word

Creating a Template

- Formatting and Locale
- 3 types of Merge Fields
- Smart Attributes

Using the Playbook

- Clauses/Sections
- Conditional Logic

Basic Redlining

- Track changes
- Check-In/Check-Out

Smart Fields

- Reconciliation

Clauses

- Smart Clauses
- Modify/Insert/Delete Clauses
- Marking and Promoting

Doc Assembly Rules

Comply System Properties

- Capturing Merge events Updating Header/Footer
- data Submit Merge Call Action
- Automating Final Document settings

Admin Tab

- Cycle Time Reporting
- Automating content search

Retention Policies