



The LawGeex Salesforce App

Training Deck: Installation & Usage

Installing the APP

1. Go to
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t58000000SHwu>

Install LawGeex

By LawGeex


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

2. Select "Install for all Users", and click "Install"

App Name	Publisher	Version Name	Version Number
LawGeex	LawGeex	LawGeex 1.3	1.3
Additional Details	View Components		

Install LawGeex

By LawGeex

Three user profile icons are shown. The third icon has a blue 'X' button next to it.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.lawgeex.com	☒

☒ Yes, grant access to these third-party web sites

Continue

Cancel

Check "grant access", and click "Continue"



Install LawGeex

By LawGeex



Installing and granting access to all Users...

Wait a few minutes...

App Name	Publisher	Version Name	Version Number
LawGeex	LawGeex	LawGeex 1.3	1.3

[Additional Details](#) [View Components](#)

Install LawGeex

By LawGeex



This app is taking a long time to install.
You will receive an email after the installation has completed.

Done

In this case
click "Done"

App Name	Publisher	Version Name	Version Number
LawGeex	LawGeex	LawGeex 1.3	1.3

Installed Packages - Salesforce

Secure | https://eu6.salesforce.com/0A3?setupid=ImportedPackage

Star | Notifications | Help

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Search...

Search

Shmuli Goldberg | Setup | Help & Training | Marketing

Home | Campaigns | Leads | Opportunities | Contacts | Accounts | Reports | Dashboards | Cases | +

Quick Find / Search...

Expand All | Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

Manage Users

Manage Apps

Company Profile

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Lightning for Outlook

Lightning for Gmail

Lightning Sync

Email Administration

Google Apps

Data.com Administration

Build

Customize

Create

Develop

Schema Builder

Lightning App Builder

Canvas App Previewer

Installed Packages

AppExchange Marketplace

Critical Updates

Deploy

Installed Packages

On Force.com 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	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A	N/A	N/A	N/A	07/07/2016 09:55	☒	0	0	0
Uninstall	Salesforce1 and Chatter Apps Description This package contains Connected Applications for all the officially supported Salesforce1 and Chatter applications on your desktop and mobile devices!	Salesforce.com	1.12	sf_chtr_apps	Free	N/A	N/A	N/A	07/07/2016 09:55	☐	0	0	0
Uninstall	Salesforce Connected Apps Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	07/07/2016 09:55	☒	0	0	0
	Channel Order Management App Description The app publishers use to track the different versions of managed packages and the licenses of subscribers who have installed them.	salesforce.com	1.17	sfLma	Active	Unlimited	0	Does not Expire	07/02/2017 07:09	☐	1	4	3
Uninstall	SFDC Channel Order Description Channel Order Management	Channel Order Management	1.39	CHANNEL_ORDERS	Active	Unlimited	0	Does not Expire	07/02/2017 06:58	☐	1	6	7
Uninstall Configure	LawGeex Description LawGeex	LawGeex	1.3	LawGeex	Free	N/A	N/A	N/A	16/02/2017 09:10	☐	1	1	3

Uninstalled Packages

No uninstalled package data archives

Help for this Page

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appexchange

Visit AppExchange »

Salesforce - Enterprise Edition

Secure | https://lawgeex.eu6.visual.force.com/apex/VF00_Config?id=00558000001jbFP

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- Manage Apps
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- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook
- Lightning for Gmail BETA
- Lightning Sync
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop
 - Schema Builder
 - Lightning App Builder
 - Canvas App Previewer
 - Installed Packages
 - AppExchange Marketplace
 - Critical Updates

Deploy

LawGeex

Configuration

Authorize

Click "Authorize"

Click on the authorize button to authorize LawGeex to return results of scan. You need to do this with an User with the "Lawgeex Integration User" permission set or with a Salesforce system administrator.

{LawGeex}



Allow Access?

LawGeex is asking to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for
shmuls@lawgeex.com? (Not you?)

Deny

Allow

Click "Allow"

To revoke access at any time, go to your personal settings.

Recommendations More

Get The Salesforce1 App

Take Salesforce with you everywhere! Download the new Salesforce1 Mobile App from the **Apple App Store** and **Google Play**.

[Skip >](#)

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Create New...

All Tabs

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Shmuli Goldberg

Brandwatch

too bespoke!

Recycle Bin

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: All Tabs

Accounts

App Launcher

Assets

Badges

Badges Received

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Service Order Detail

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Click "Customize"

Add Tabs to Your Default Display

Customize My Tabs

{LawGeex}

Customize My Tabs ~ Salesforce

Secure | <https://eu6.salesforce.com/p/setup/layout/ConfigureMyTabs?retURL=%2Fhome%2FshowAllTabs.jsp&setupid=CustomizeTabs>

Shmuli Goldberg Setup Help & Training Marketing

Home Campaigns Leads Opportunities Contacts Accounts Reports Dashboards Cases +

Quick Find

Customize My Tabs

Choose the tabs that will display in each of your apps.

Custom App: Marketing

Available Tabs

- Files
- Forecasts
- Groups
- Ideas
- LawGeex Documents**
- Licenses
- Macros
- Orders
- Orders
- Packages
- Package Versions
- Partner Contract Terms

Add

Remove

Selected Tabs

- Home
- Campaigns (default)
- Leads
- Opportunities
- Contacts
- Accounts
- Reports
- Dashboards
- Cases

Up

Down

Choose to display "Law Geex Documents" tab in each of your apps

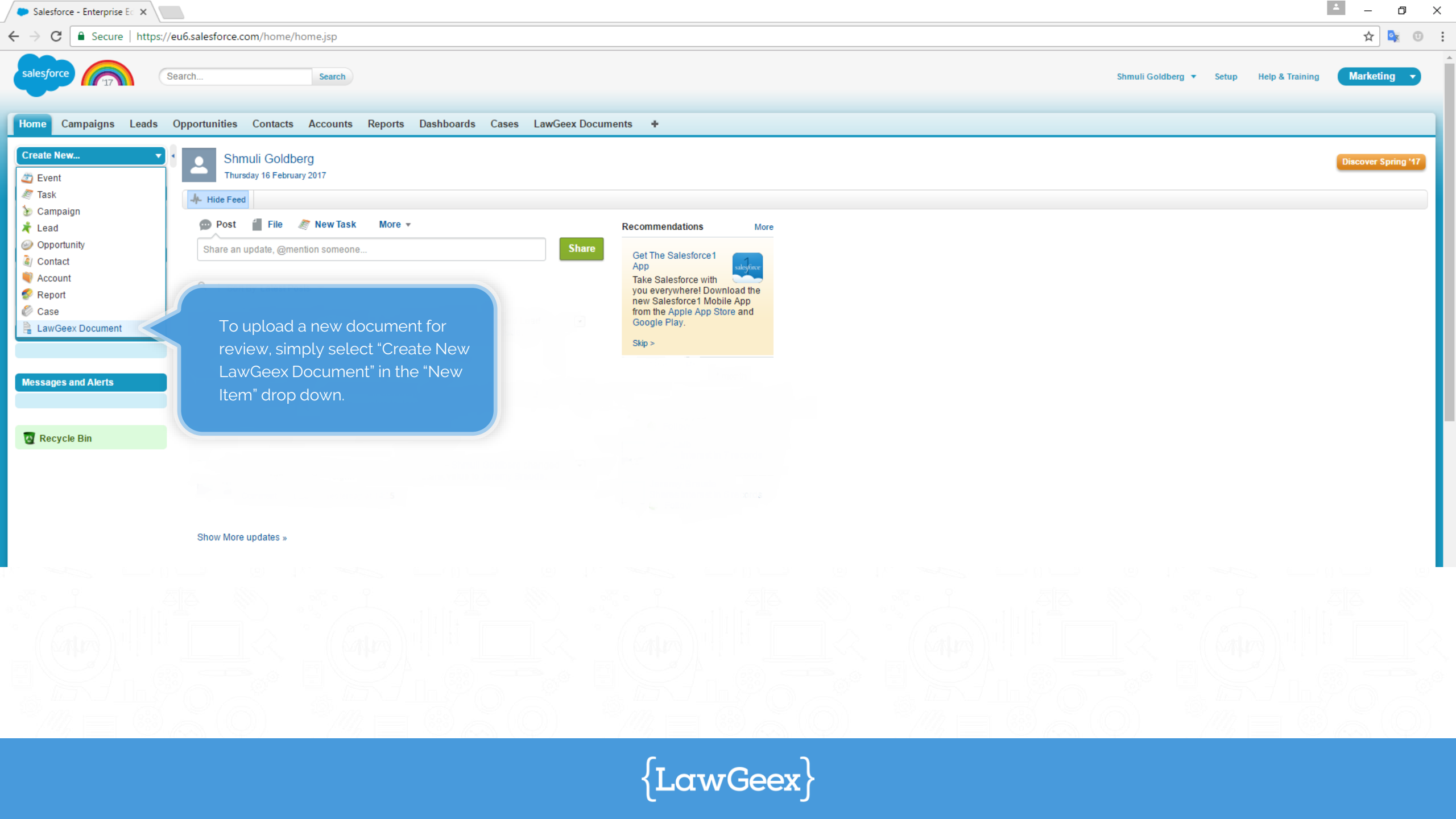
Click "Save"

Save Cancel

Help for this Page

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Using the APP



To upload a new document for review, simply select "Create New LawGeex Document" in the "New Item" drop down.

LawGeex Document Edit: x

Secure | <https://eu6.salesforce.com/a0C/e?retURL=%2Fhome%2Fhome.jsp>

salesforce 17 Search... Search

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Create New... New LawGeex Document

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Joost Vlot
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Recycle Bin

LawGeex Document Edit

Save Save & New Cancel

Information

LawGeex Document Name LawGeex NDA Doc

Document Type NDA

Link to Current Version

Description

Owner Shmuli Goldberg

Related To

Opportunity

Contract

Waiting Time

Time in Draft [hours] 0.00

Time in Pending [hours] 0.00

Time in Not Approved [hours] 0.00

Save Save & New Cancel

Help for this Page

1. Type "Doc Name" & and select "Doc Type"

2. Click "Save"

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LawGeex Document: Law

Secure | https://eu6.salesforce.com/a0C5800000AmhPM

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LawGeex NDA Doc

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Versions [0]

Click "Attach..."

Shmuli Goldberg [Change]

LawGeex Document Detail

Edit

Delete

Clone

Attach Document & Send for LawGeex Review

LawGeex Document Name	LawGeex NDA Doc
Document Type	NDA
Link to Current Version	
Description	
Status	Draft
Approved Date	

Related To

Opportunity	Contract
-------------	----------

LawGeex Review Results (Latest Version Only)

# of missing clauses	# of uncommon clauses
LawGeex Report	

Waiting Time

Time in Draft [hours]	0.00	Time in Pending [hours]	0.00
Time in Not Approved [hours]	0.00		

System Information

Created By	Shmuli Goldberg, 16/02/2017 10:03	Last Modified By	Shmuli Goldberg, 16/02/2017 10:03
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Edit

Delete

Clone

Attach Document & Send for LawGeex Review

Versions

No records to display

Versions Help

Back To Top

Always show me more records per related list



Send for LawGeex Review

PLEASE SELECT A FILE FROM ONE OF THE FOLLOWING LOCATIONS

+ New file

1. Select "New File" in the "Attachment" drop down

2. Click "Browse"

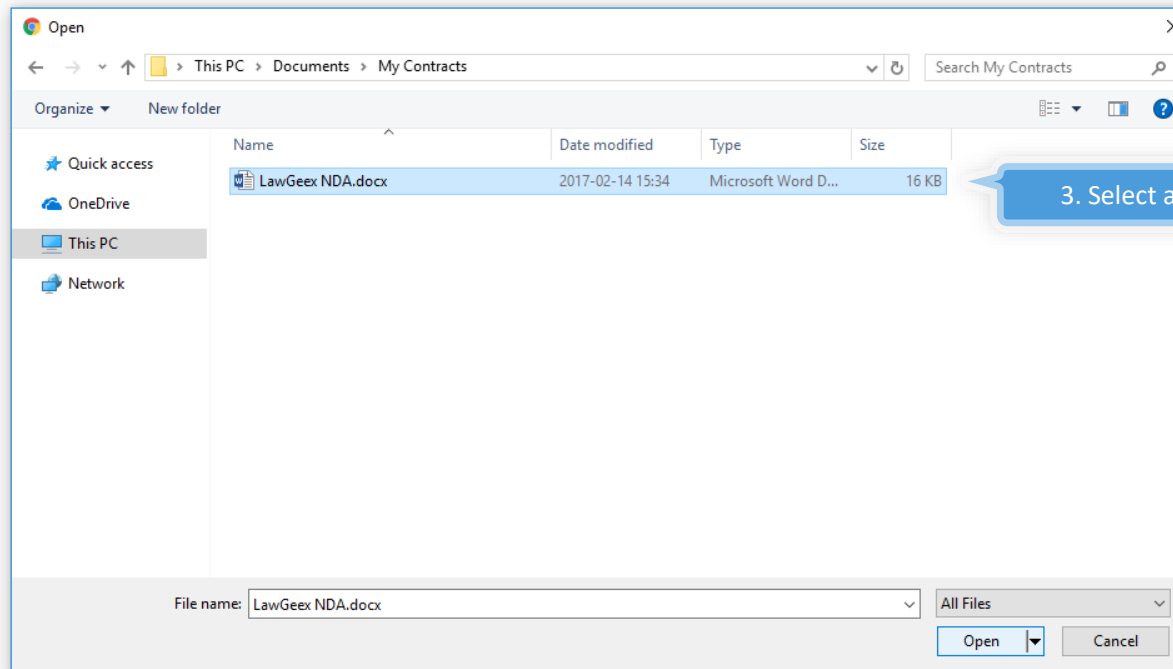
Browse

VERSION TYPE

Minor

4. Click "Send"

Send for LawGeex Review



3. Select a file

Contract is being uploaded!



The file is being uploaded to LawGeex for review.

Version: V-00000000 ~ S x

Secure | https://eu6.salesforce.com/a0D58000005GrzmEAC

star icon

gear icon

info icon

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Version

V-00000000

Customize Page | Edit Layout | Printable View | Help for this Page ?

Notes & Attachments [1]

Version Detail

Edit

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Clone

Version Name	V-00000000	LawGeex Document	LawGeex NDA Doc
Version Number	0.1	File Name	LawGeex NDA.docx
Status	Pending LawGeex Review	Approved Date	
Version Type	Minor	Error Message	
Current Pending Time [hours]	0.00		

Contract is pending LawGeex review

LawGeex Review Results

Approved

of missing clauses

of uncommon clauses

Sent to LawGeex On

LawGeex Report

Total Waiting Time [hours]

Current Pending Time [days]

Created By

Shmuli Goldberg

16/02/2017 10:16

Edit

Delete

Clone

Results should arrive in a few hours

Notes & Attachments

New Note

Attach File

View All

Notes & Attachments Help ?

Action	Type	Title	Last Modified	Created By
Edit View Del	Attachment	LawGeex NDA.docx	16/02/2017 10:16	Shmuli Goldberg

Always show me ▾ more records per related list

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LawGeex Document: Law X

Secure | https://eu6.salesforce.com/a0C5800000AmhPM

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Versions [1]

LawGeex Document Detail

Edit Delete Clone Attach Document & Send for LawGeex Review

LawGeex Document Name

LawGeex NDA Doc

Owner

Shmuli Goldberg [Change]

Document Type

NDA

Version Number

0.2

Link to Current Version

V-00000001

Description

Status

Not Approved

Approved Date

1. Once LawGeex review is completed, the status changes to "Approved" \ "Not Approved"

▼ Related To

Opportunity

Contract

▼ LawGeex Review Results (Latest Version Only)

of missing clauses

10

of uncommon clauses

1

LawGeex Report

View LawGeex Results

2. LawGeex Report is available from within Salesforce

▼ Waiting Time

Time in Draft [hours]

0.00

Time in Pending [hours]

0.03

3. All your revisions are centralized and you can access the full LawGeex report with one click.

16/02/2017 10:03

Last Modified By

Shmuli Goldberg, 16/02/2017 10:31

Edit Delete Clone Attach Document & Send for LawGeex Review

Versions

Versions Help ?

Action	Version Name	File Name	Version Number	Approved	Created Date	Approved Date	LawGeex Report	Status
Edit Del	V-00000001	Law Geex NDA .docx	0.1	☐	16/02/2017		View LawGeex Results	Not Approved

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LawGeex Documents: Home

Secure | https://eu6.salesforce.com/a00C/o

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Recent Items

- Featureforward
- Quadrantlaw
- Macrogenics
- Howden
- Bizzabo
- Shmuli Goldberg
- Brandwatch
- Sears HC
- Ooma
- Metso

Recycle Bin

LawGeex Documents Home

View: All Go! Edit | Create New View

Recent LawGeex Documents

LawGeex Document Name	Version Number	Document Type	Status	Created Date	Approved Date	LawGeex Report
LawGeex NDA Doc	0.2	NDA	Not Approved	16/02/2017		View LawGeex Results

Once LawGeex either approves or rejects the contract, the results are reflected in the "LawGeex Documents" Tab.
in addition, an email notification is sent (separate process to SF).

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Secure

https://lawgeex.eu6.visual.force.com/apex/VF03_CanvasApp?Id=a0D58000005Gs8u

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YOUR CONTRACT CONTAINS:

1 Uncommon Clauses

> Term of Confidentiality

Term of Confidentiality : 5 years

10 Missing Clauses

> Definition of Protected Information

> Need to Know

> Use for Purpose

> Injunctive Relief

> Return or Destruction of Protected Information

> Disclaimer of Warranty/Liability

> Export Limitations

> No Future Obligations

> Standard of Care

> Liability for Third-Party Disclosures

11 Common Clauses

> Exclusion - Prior Knowledge

YOUR CONTRACT IS MISSING CLAUSES

NDA V3

BILATERAL CONFIDENTIAL DISCLOSURE AGREEMENT

Big & Fancy Corp. ("Participant") and Legalogic Ltd. ("Legalogic") are interested in exchanging and evaluating certain information, which is considered confidential (as further defined below "Confidential Information"). Participant and Legalogic agree to exchange Confidential Information under this agreement ("Agreement") subject to the following terms and conditions:

1. During the Term of this Agreement, Legalogic may, directly or indirectly, provide Confidential Information to Participant and Participant may, directly or indirectly, provide Confidential Information to Legalogic. Each party shall advise the other of its interest. If both parties are interested, each party agrees to discuss with the other the terms of a possible negotiated Arrangement relating to the Confidential Information. If one or both parties are not interested, or if an Arrangement is not entered into between the parties, upon written request, each party agrees to return or destroy all Confidential Information received from the other.

2. The nondisclosure and confidentiality undertakings of each party under this Agreement shall survive and remain in full force and effect following the termination or expiration of this Agreement for a period of five (5) years from the date of the particular disclosure.

3. During the Term of this Agreement, and any extensions thereof, and for a period of five (5) years after the expiration or termination of this Agreement, each party agrees not to disclose Confidential Information received from the other to any third person without the prior written approval of the other party. Notwithstanding the foregoing, obligations of confidentiality and non-use with respect to any Confidential Information identified as a trade secret by either party will survive indefinitely. Confidential Information shall include all information provided hereunder in writing, orally, visually and/or observed while on the premises of either party, except any portion thereof which:

(a) is known to the recipient, as evidenced by its written records, prior to receipt thereof under this Agreement;

(b) is disclosed to the recipient by a third person after the full execution of this Agreement, and that third person has a legal right to make such disclosure;

(c) is or becomes part of the public domain other than through breach of this Agreement by recipient;

Instructions

Navigate through your contract's clauses by using the links on the left side.

Click "More..." above, to Print, Share, or Fix your contract.

You can always ask us questions about your contract by clicking on the chat icon below.

LawGeex