# Document Template Clauses Table

The Document Template Clauses table helps to identify how a Clause record is used in different Document Template records.

# Use Case

Document Template Clauses is used to identify clauses from the Clause Library that are available or in use for a particular Document Template record. It will appear as an embedded table in the Document Template record and can be organized in order of appearance. Records are created manually or by import when creating a document template and associated clauses. Each record also defines the Approval Team that should approve if it the clause is modified during negotiations.

Each Document Template Clause record is linked to both the Document Template ID and to the Clause ID in the Clause Library. Document Template Clause records have usage factors such as whether it is used by default, conditionally, optionally, or as a fallback. Clause Usage is defined by the following:

- **Default** - Always used in a document template, hard-coded.
- **Conditional** - May be used if a specific condition is met in the Contract. When usage is Conditional, a Condition field is displayed along with a Condition Description. The purpose of the Condition field is to enter the condition as inserted in the Document Template record so that it can be referenced without opening the template.
- **Optional** - One of several clauses that could be used based on a user choice in the Contract.
- **Fallback** - Used when a default clause has an alternative clause that may be used in special circumstances. When used, you want to make the alternatives visible in the contract for copying/pasting into a document template.

# Automation

There are no rules in this table. Although the Document Template Clause records indicate the team responsible for their approval when included in a template, no logic is currently in place to trigger an Approval record.

# Workflow

Records are no longer used by the AI Clause script when they are dissociated with the corresponding Document Template and Clause Library ID.

# Ownership

Records are owned by the user who creates them and can be created and viewed by an Admin or Business Admin.