

Agenda – Part A

- | | |
|----|---|
| 01 | Icertis Contract Intelligence Platform- An Overview |
| 02 | Authoring Agreements |
| 03 | Agreement Workflow |
| 04 | Linking Agreements |
| 05 | Agreement Constituents |
| 06 | Post Execution Workflow |
| 07 | Search and Reports |



Agreement Constituents

Icertis Contract Intelligence
Product Training



Contents

01	Associations
02	Document List
03	Collaboration
04	Commitments
05	Reports

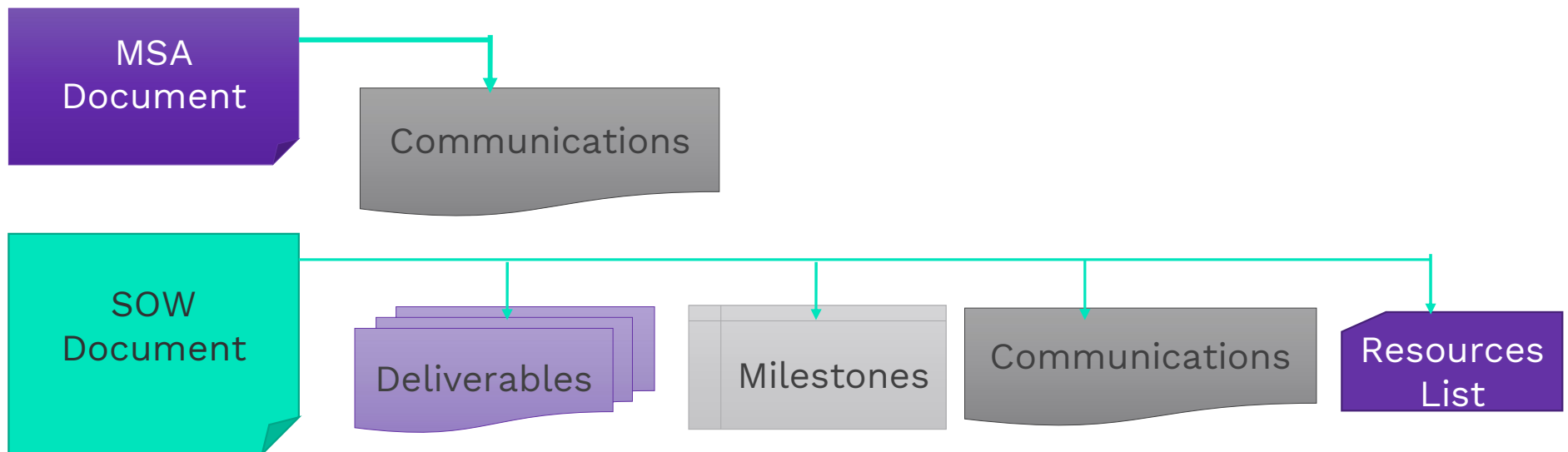


Associations

Supporting Documents

- For many agreements, some additional legal documents or supplement materials need to be associated
- These additional documents are called Associated Documents

Examples- Scanned copies of Purchase order, invoices, Brochures, Rate Charts



Add Supporting Documents

Agreements / MSA Supriya (ICMStatementofWork_5)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

...

Menu

Associations

All Associations

Master Services Agree... 1

Communications 0

Deliverable 0

Milestones 0

Product List 0

Document List

Summary

CREATED BY
Supriya Ashtikar

CREATED
2/4/2022

ICMStatementofWork_5
/icertis

DEPARTMENT
Engineering

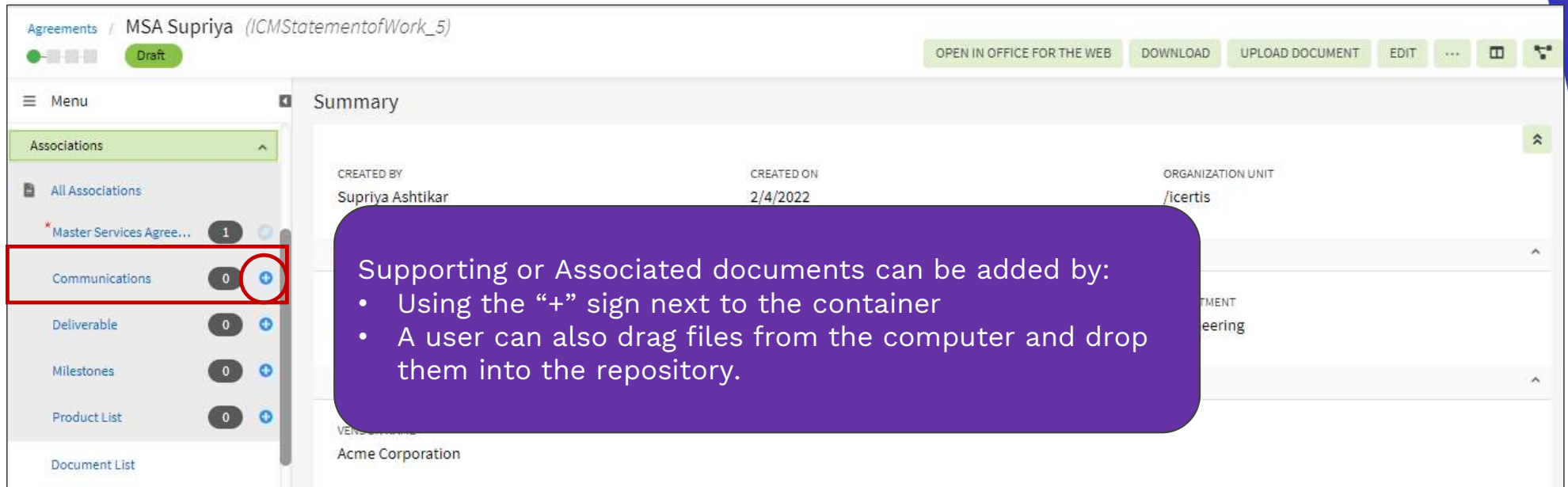
2. Vendor Information

VENDOR NAME
Acme Corporation

Supporting documents for an agreement can be uploaded to a repository.

Example, Communications is a sample container that can hold multiple files of different formats.

Add Supporting Documents



Agreements / MSA Supriya (ICMStatementofWork_5)

Draft

OPEN IN OFFICE FOR THE WEB DOWNLOAD UPLOAD DOCUMENT EDIT ...

Menu

Associations

All Associations

* Master Services Agree... 1

Communications 0 +

Deliverable 0 +

Milestones 0 +

Product List 0 +

Document List

Summary

CREATED BY: Supriya Ashtikar

CREATED ON: 2/4/2022

ORGANIZATION UNIT: /icertis

Supporting or Associated documents can be added by:

- Using the “+” sign next to the container
- A user can also drag files from the computer and drop them into the repository.

Add Supporting Documents

The screenshot displays the Icertis application interface. At the top, there is a navigation bar with various modules: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below this, the main content area is titled 'MSA Supriya (ICMStatementofWork_5)' and shows a 'Draft' status. A sidebar on the left contains a 'Menu' section with 'Versions' and 'History', and an 'Associations' section with a list of items: 'Master Services Agree...' (1), 'Communications' (0), 'Deliverable' (0), 'Milestones' (0), 'Product List' (0), 'Document List', and 'Deviations' (0). The main content area has a 'Refine View' section with a 'Contains' dropdown and a search bar. Below this, there is a 'CATEGORIES' section with a 'Select Field' dropdown. The central area is a large drop zone with the text 'Drag & Drop files here to upload/add to this agreement' and a large document icon. A '+ Copy' button is visible below the icon. At the bottom, there is a message: 'It looks like there are no records for your selected page or criteria!'. A red dashed box highlights the entire interface.

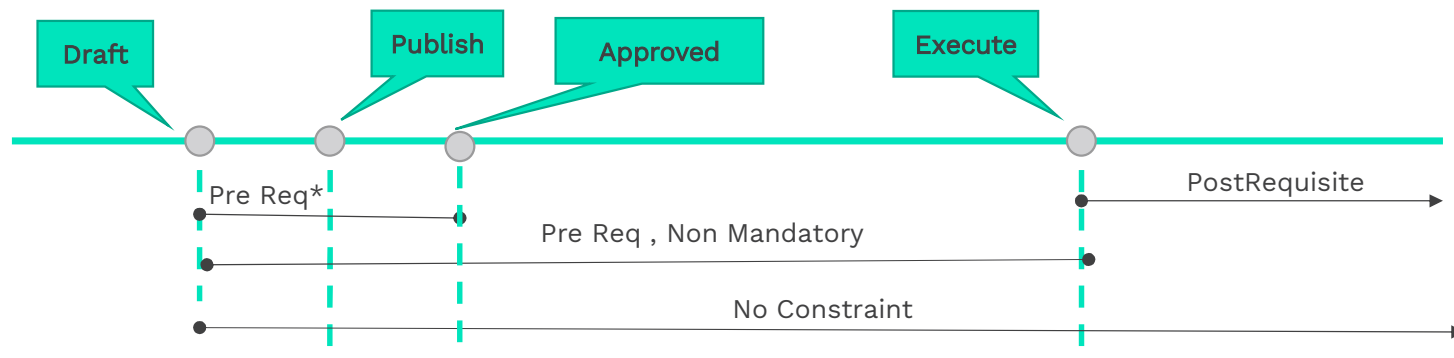
Entire screen turns to Drop zone

Drag files from the computer and drop them into the repository

Agreement Constituents

Uploading Supporting Documents - Constraints

- There are three types of constraints for uploading Associated document



Upload Supporting Documents

The screenshot displays the Icertis Deliverable management interface. On the left, a sidebar menu lists various associations, with 'Deliverable' highlighted in green and marked with a red box. The main area shows a table of deliverables with columns for Entity Name, Name, Agreement CO..., Created By, Created Date, and Status. Two deliverables are listed: 'Deliverable' with ID 'ICMDeliverable_3' and 'Deliverable' with ID 'ICMDeliverable_2', both in 'Draft' status. A context menu is open for the second deliverable, with 'Preview Document' highlighted in a red box. A purple callout box explains that the supporting document has various actions available, and 'Preview Document' opens the document viewer.

Associations / Deliverable

Refine View

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

ENTITY NAME	NAME	AGREEMENT CO...	CREATED BY	CREATED DATE	STATUS
Deliverable		ICMDeliverable_3	Supriya Ashtikar	2/7/2022	• Draft
Deliverable		ICMDeliverable_2	Supriya Ashtikar	2/4/2022	• Draft

8 Items Per Page

Preview Document

View Smart Links

Disassociate

Copy

Edit

View Details

The supporting document that is added has various actions available
Preview Document opens the document viewer to open the document

View Parent Record for Supporting Document

Associations / (ICMDeliverable_3)

Draft

UPLOAD DOCUMENT SMART LINKS OPEN IN OFFICE FOR THE WEB EDIT ...

Menu

Summary

Details

Versions

History

Team

Notes

Reports

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/7/2022

ORGANIZATION UNIT
/icertis

PARENT RECORD
ICMStatementofWork_4

AGREEMENT CODE
ICMDeliverable_3

DOCUMENT DATE
--

NAME
--

DOCUMENT TYPE
--

DOCUMENT NAME
Deliverables

Link to the Parent document

Edit Associated Documents using Office Online

Associations / (ICMDeliverable_3)

Draft

UPLOAD DOCUMENTSMART LINKSOPEN IN OFFICE FOR THE WEBEDIT...📄🔍

Menu

Summary

Details

Versions

History

Team

Notes

Reports

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/7/2022

ORGANIZATION UNIT
/icertis

PARENT RECORD
ICMStatementofWork_4

AGREEMENT CODE
ICMDeliverable_3

DOCUMENT DATE
--

Supporting documents can be edited using office online edition
Multiple users can edit, comment and collaborate on a document
using the Open in Office for the Web button

View Supporting Documents in Document Viewer

The screenshot displays the Icertis Document Viewer interface. On the left, a sidebar menu lists various document types: Home, Agreements, Requests, Associations, Communications, Deliverable (highlighted with a red box), Milestones, Product List, Resource List, Document List, Amendments, and Commitments. The main area shows a preview of a document titled "Preview Document - Deliverable - ICMDeliverable_3". The document is an Excel spreadsheet with the following data:

Project Name	Project Taks	Date	Amount
Project A	Task 1	1/1/2022	500
	Task 2	1/15/2022	2000
	Task 3	2/2/2022	1500
	Task 4	15-2-2022	3000

A purple callout box with white text states: "Here is the preview of the associated document. It opens an excel view of the supporting document." The interface also includes a search bar at the top, a "Draft" button, and a "Menu" button in the sidebar.

Edit Associated Documents using Office Online

Associations / (ICMDeliverable_3)

Draft - In Editing (Initiated by Supriya Ashtikar)

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/7/2022

ORGANIZATION UNIT
/icertis

PARENT RECORD
ICMStatementofWork_4

AGREEMENT CODE
ICMDeliverable_3

NAME
--

DOCUMENT NAME

Excel ICMDeliverable_a5bcd41e-3c5a-46ba-831d-6a1d75cec60f_1_online - Saved

Supriya Ashtikar

File Home Insert Draw Page Layout Formulas Data Review View Help

10 B

fx

Project Name	Project Taks	Date	Amount
Project A	Task 1	1/1/2022	500
	Task 2	1/15/2022	2000
	Task 3	2/2/2022	1500
	Task 4	15-2-2022	3000

100%

Supporting documents can be edited using office online edition
Multiple users can edit, comment and collaborate on a document
using the Open in Office for the Web button

Edit Associated Documents using Office Online

Associations / (ICMDeliverable_3)

Draft - In Editing (Initiated by Supriya Ashtikar)

Summary

CREATED BY

Supriya Ashtikar

CREATED ON

2/7/2022

ORGANIZATION UNIT

/icertis

PARENT RECORD

ICMStatementofWork_4

AGREEMENT CODE

ICMDeliverable_3

NAME

--

DOCUMENT NAME

1

2

3

4

DISCARD CHANGES

OPEN OFFICE IN FULL SCREEN

CHECK IN

COPY EDITOR LINK

Action Buttons:

1. Discard Changes– Discard the changes made to the document

2. Open Office in Full Screen – View the document in full screen mode

3. Check In – Submit the Changes made to the document

4. Copy Editor Link – Get the sharable link for the document to work in collaboration.

3	Project A	Task 1	1/1/2022	500															
4		Task 2	1/15/2022	2000															
5		Task 3	2/2/2022	1500															
6		Task 4	15-2-2022	3000															
7																			
8																			
9																			

<

>

≡

Sheet1

+

Calculation Mode: Automatic Workbook Statistics Give Feedback to Microsoft 100% +

Edit Associated Documents using Office Online

Edit Associated Documents using Office Online

Associations / (ICMDeliverable_3)

Draft

UPLOAD DOCUMENT SMART LINKS OPEN IN OFFICE FOR THE WEB EDIT ...

Versions

Q Refine Search Here...

CLEAR GRID FILTERS

VERSION	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
2	Supriya Ashtikar	Primary Owner	supriya.ashtikar@icertis.com	2/7/2022 10:19:13 AM	Document edited to add Project B task	
1	Supriya Ashtikar	Primary Owner	supriya.ashtikar@icertis.com	2/7/2022 6:24:46 AM		

8 Items Per Page

1 to 2 of 2 Items

1

User can see the new version is generated after making the changes and committing them using Check In action.

Viewing Uploaded Documents

Associations / (ICMDeliverable_3)

Draft

UPLOAD DOCUMENTSMART LINKSOPEN IN OFFICE FOR THE WEBEDIT...

Summary

CREATED BY

Supriya Ashtikar

CREATED ON

2/7/2022

ORGANIZATION UNIT

/icertis

PARENT RECORD

ICMStatementofWork_4

AGREEMENT CODE

ICMDeliverable_3

DOCUMENT DATE

--

NAME

--

DOCUMENT NAME

Deliverables

DOCUMENT TYPE

--

The organization unit path of the parent document will be displayed by default as the organization path for the associated document

Adding metadata for associations

Milestone association:
User can create attributes
to enter the metadata
related to the association.

Milestones / (ICMMilestones_2)

1 Meta Data

AGREEMENT CODE ?	ICMMILESTONES_2	
NAME ?	<input type="text"/>	
TASK NAME	<input type="text" value="Trainer"/>	
START DATE	<input type="text" value="1/4/2022"/>	
END DATE	<input type="text" value="1/31/2022"/>	
PAYMENT AMOUNT	<input type="text" value="USD"/>	<input type="text" value="5,000.00"/>
PROJECT PERCENTAGE COMPLETION	<input type="text" value="Fifty Percent"/>	

Dynamic Associations

- The dynamic associations are created based on certain condition

The screenshot displays a software interface with a sidebar menu and a main content area. The sidebar menu, titled 'Menu', lists several association types: 'All Associations', 'Master Services Agree...', 'Communications', 'Deliverable', 'Milestones', 'Product List', and 'Resource List'. The 'Resource List' item is highlighted with a red border and a count of '1'. The main content area shows a form with fields for 'CONTRACT TERM' (27 IN DAYS), 'CONTRACT VALUE' (USD 60,000.00), 'PAYMENT TERMS' (45 days), 'COUNTRY HEAD' (--), and 'DESCRIPTION OF SERVICES' (Training). The 'SPECIFIC RESOURCES REQUIRED' field is highlighted with a red border and set to 'Yes'. A purple callout box contains the text: 'In this example, the Specific Resources Required flag is used as the condition to decide whether Resource List is needed as an association'. A green arrow points from the 'Resource List' menu item to the 'SPECIFIC RESOURCES REQUIRED' field.

Field	Value
CONTRACT TERM	27 IN DAYS
CONTRACT VALUE	USD 60,000.00
PAYMENT TERMS	45 days
COUNTRY HEAD	--
DESCRIPTION OF SERVICES	Training
SPECIFIC RESOURCES REQUIRED	Yes



Metadata for Dynamic Associations

Resource List Association:

This is a dynamic association
User can enter related
information in attributes.

Resource List / (ICMResourceList_2)

1 Meta Data

NAME ?	<input type="text"/>
RESOURCE NAME	<input type="text" value="Dinesh"/>
RESOURCE TYPE	<input type="text" value="Trainer"/>
START DATE	<input type="text" value="1/4/2022"/> 
END DATE	<input type="text" value="1/31/2022"/> 

Assembling Associations

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

Bulk Actions

Admin

Agreements / SOW Supriya (ICMStatementofWork_4)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/4/2022

ORGANIZATION UNIT
/icertis

1. General Information

AGREEMENT CODE
ICMStatementofWork_4

CONTRACT NAME
SOW Supriya

DEPARTMENT
Engineering

2. Vendor Information

VENDOR NAME
Indus Ltd.

3. Terms and Services

EFFECTIVE DATE
1/4/2022

EXPIRY DATE
1/31/2022

CONTRACT TERM
27

Send For Approval

Cancel

Smart Links

Lock

Download All

Confidential

Compare Documents

Collaborate

Broadcast

Agreement Deviation Report

Compare Clause Changes

Assemble Contract

Request Review

On Hold

Delete

Copy Record

The Assemble Contract action allows to assemble the associations with the SOW agreement document

Assembling Associations in Agreement Document

STATEMENT OF WORK

Effective Date	04/2022
Expiry Date	31/10/22
Description of Services	Training <small>(Refer Exhibit for detailed description of the services)</small>
Fees	6,00,000.00 <small>The fees and amounts out and borne are as US Dollars unless otherwise specified herein. Please refer to Section 3 of Master Services Agreement for further terms regarding the fees</small>
Expenses/Reimbursements	Company shall reimburse the Supplier for all reasonable expenses and other disbursements accurately incurred in the performance of the Services, provided that (i) Company has given its prior written consent the pay such expenses, (ii) the expenses have been detailed step by step acceptable to Company and submitted by Company for review and approval in accordance with Company's expense policy and approval process; and (iii) appropriate documentation substantiating the expenses is provided by the Supplier. All such expenses will be incurred at reasonable actual cost.
Services	Services Payable <small>(Refer to Exhibit 100) (20) Kevin Bond Sales</small>
Payment Terms	The Supplier shall prepare and submit invoices monthly on the 10th day of the month following the month in which the Services were rendered as the Deliverables were completed or accepted, as applicable. Each invoice shall specifically reference the applicable Company purchase order number and include item details and any other documentation reasonably requested by Company from time to time. Company shall pay approved invoices within 45 days of receipt of such invoice. Payment shall be in US Dollars unless otherwise specified above.

SUPPLIER

Signature: _____
 Representative Name: CLM Admin
 Date: _____

COMPANY

Signature: _____
 Representative Name: CLM Admin
 Date: _____

DELIVERABLE

Project Name	Project Task	Date	Amount
Project A	Task 1	10/1/2022	500
	Task 2	15/10/2022	2000
	Task 3	20/10/2022	1500
	Task 4	15/11/2022	3000

Associations are assembled in the word document.

Milestones

Task Name	Start Date	Payment Amount
Beta Release	5/25/2020	\$ 50,000.00
Prototyping	5/25/2020	\$ 10,000.00

Resource List

Resource Name	Resource Type	Start Date	End Date	Resource Duration
Michel	Contract	5/4/2020	9/30/2020	149

Product List

Agreement Code	Name	Product Name	Product Quantity	Product Price Per Unit
ICMProductList_2		Product A	10.00	\$ 50.00

Downloading Associations

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

Bulk Actions

Admin

Agreements / SOW Supriya (ICMStatementofWork_4)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Master Services Agree... 1

Communications 1

Deliverable 2

Milestones 1

Summary

1. General Information

2. Vendor Information

3. Terms and Services

ORGANIZA /icertis

Send For Approval

Cancel

Smart Links

Lock

Download All

Confidential

Compare Documents

Collaborate

Broadcast

Agreement Deviation Report

Compare Clause Changes

Assemble Contract

Request Review

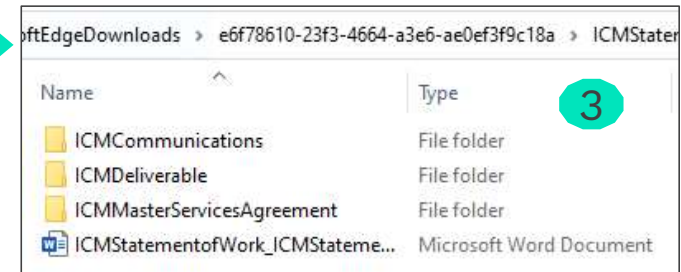
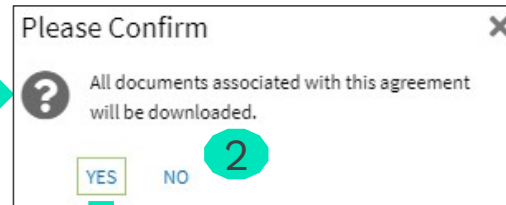
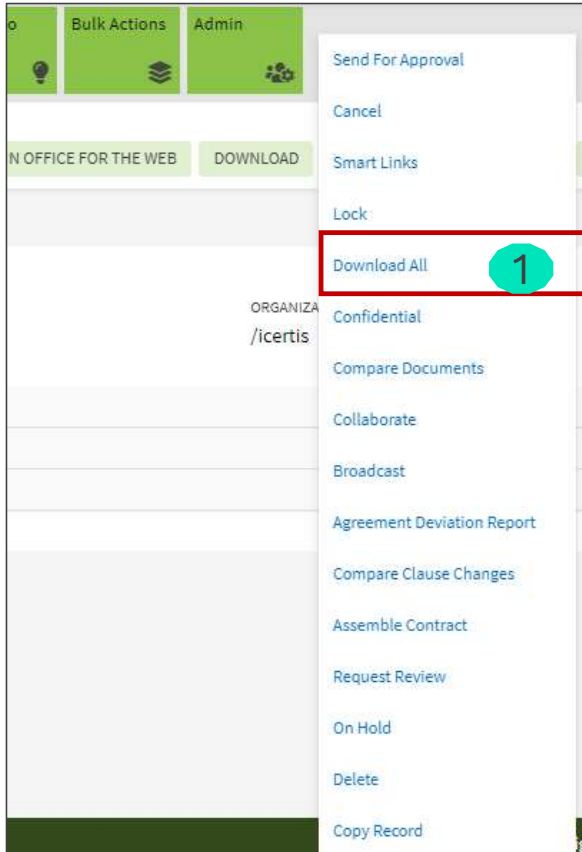
On Hold

Delete

Copy Record

The latest version of the agreement and its associations can be downloaded using the Download All action.

Downloading Associations



Document List

Document List

- ICI provides the option to list all the agreements and associated documents
- This service is available automatically for users with AI Studio license

Waiting For External Signature from Supriya Ashtikar

SMART LINKS DOWNLOAD COMPARE DOCUMENTS BROADCAST ... [Icons]

Menu

ASSOCIATIONS

All Associations

Communications 0 +

Statement of Work 0 +

Document List

Deviations 0

Amendments 0

Commitments 0

Document List

Refine View

Contains

Refine Search here (min 3 char)

CATEGORIES ?

Select Field

Showing 1 to 1 of 1 Document

RUN AI ANALYSIS VIEW ANALYSIS RESULTS REFRESH ... [Icons]

<input type="checkbox"/>	ENTITY NAME	CONTRACT NAME	AGREEMENT C...	CREATED BY	CREATED DATE	STATUS	
<input type="checkbox"/>	Master Services ...	MSA_Supriya	ICMMasterServic...	Supriya Ashtikar	1/6/2022	Waiting For Ext...	[Eye] [More]

8 Items Per Page

<< < 1 > >>

Collaboration

Collaboration

Waiting For External Signature from Supriya Ashtikar

SMART LINKS

DOWNLOAD

COMPARE DOCUMENTS

BROADCAST

...

Menu

Documents

Deviations 0

Amendments 0

Commitments 0

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver 0

Notes 0

Collaboration

Collaboration

Multiple topics can be created for discussion with various stakeholders

Once the discussion is concluded the topic can be closed

It looks like there are No Topics for you to collaborate on!

START A NEW TOPIC

1

Collaboration

Home

Agreements

Requests

Associations

Agreements

SOW Supriya (ICMStatementofWork_4)

Draft

Menu

Collaboration

Document List

Deviations 0

Amendments 0

Commitments 0

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver 0

Notes 0

Collaboration

Reports

About

2 Create a New Topic

PARTICIPANTS

All Team Members

Select Team Members

CLM Admin

DO YOU WANT TO MARK THIS TOPIC AS CONFIDENTIAL?

No

SUBJECT

Quality Check

Name

MESSAGE

B I U abc

Format

(inherited font)

(inherited size)

A

Please check if the vendor has delivered the quality products.

CREATE

Users can send messages to all Team members or the select Team members

Icertis

30

Collaboration – Create a New Topic

Agreements / SOW Supriya (ICMStatementofWork_4)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

...

Menu

Document List

Deviations 0

Amendments 0

Commitments 0

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver 0

Notes 0

Collaboration

Collaboration

Search here for Messages

NEW TOPIC

REFRESH

Quality Check 2/15/2022

2 Participants

INITIATED BY SUPRIYA ASHTIKAR

LAST ACTION BY SUPRIYA ASHTIKAR

Quality Check 2 Participants 3

REPLY

CLOSE TOPIC

SUPRIYA ASHTIKAR (2/15/2022 19:25:32)

Please check if the vendor has delivered the quality products.

VIEW DETAILS

Self Help

Topic created and the respective participants can view and respond

Commitments

Commitments

Commitments allow to track the fulfillment of the tasks related to the agreement

Menu

Communications0+

Statement of Work0+

Document List

Deviations0

Amendments0

Commitments0

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver0

Notes0

Collaboration

About

Add Commitment

Auto Generated

Please enter the description of the commitment.

Transaction

RECURRING COMMITMENTNo

DUE DATE

BUSINESS OWNERFinance User

INSTRUCTIONS

REMINDER (IN DAYS)1ST 72ND 33RD 1

OVER DUE REMINDER (IN DAYS)2

SAVE

Reminders are sent to the Business Owner

Commitments

Home

Agreements

Requests

Associations

Compliances

Templates

Agreements / MSA_Supriya (ICMMasterServicesAgreement_5)

Waiting For External Signature from Supriya Ashtikar

Menu

Associations

All Associations

Communications 0

Statement of Work 0

Document List

Deviations 0

Amendments 0

Commitments 1

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver 0

About

COMMITMENT ...

Transaction

8 Items Per Page

DESCRIPTION

Check the material delivery timelines.

* COMMITMENT TYPE

Transaction

RECURRING COMMITMENT

Yes

* COMMITMENT FREQUENCY

Weekly

* START DATE

2/7/2022

* END DATE

3/7/2022

* BUSINESS OWNER

Icertis Admin

INSTRUCTIONS

Please enter the Instructions.

REMINDER (IN DAYS)

1ST 0 2ND 0 3RD 0

OVER DUE REMINDER (IN DAYS)

0

SAVE

The commitment can be set as recurring commitment or one time

Compliance Management

- Multiple commitments can be added for an agreement

Agreements / MSA_Supriya (ICMMasterServicesAgreement_5)

Waiting For External Signature from Supriya Ashtikar

SMART LINKS

DOWNLOAD

COMPARE DOCUMENTS

BROADCAST

Menu

Commitments

Associations

All Associations

Communications 0 +

Statement of Work 0 +

Document List

Deviations 0

Amendments 0

✓

Commitments 3

ADD COMMITMENT

SEND BULK NOTIFICATION

CLEAR GRID FILTERS

<input type="checkbox"/>	COMMITMENT ...	COMMITMENT STATUS	DESCRIPTION	BUSINESS OWNER	DUE DATE	CREATED DATE	
<input type="checkbox"/>	Transaction	Overdue	Check the material delivery timelines.	Icertis Admin	2/7/2022	2/8/2022	...
<input type="checkbox"/>	Transaction	Not Completed	Review and approve the invoices	Finance User	2/14/2022	2/8/2022	...
<input type="checkbox"/>	Transaction	Not Completed	Check the material delivery timelines.	Icertis Admin	2/14/2022	2/8/2022	...

8

Items Per Page

1 to 3 of 3 items

<<

<

1

>

>>

Compliance Management

- Various actions can be performed on commitments.

Agreements / MSA_Supriya (ICMMasterServicesAgreement_5)

Waiting For External Signature from Supriya Ashtikar

SMART LINKS

DOWNLOAD

COMPARE DOCUMENTS

BROADCAST

...

Menu

Commitments

Associations

All Associations

Communications0+

Statement of Work0+

Document List

Deviations0

Amendments0

Commitments3

ADD COMMITMENT

SEND BULK NOTIFICATION

CLEAR GRID FILTERS

	COMMITMENT ...	COMMITMENT STATUS	DESCRIPTION	BUSINESS	CREATED DATE	
<input type="checkbox"/>	Transaction	Overdue	Check the material delivery timelines.	Icertis Ad	2/8/2022	
<input type="checkbox"/>	Transaction	Not Completed	Review and approve the invoices	Finance User	2/14/2022	
<input type="checkbox"/>	Transaction	Not Completed	Check the material delivery timelines.	Icertis Admin	2/14/2022	

8 Items Per Page

Commitment actions

Edit Commitment

Delete Commitment

Copy Commitment

Send Notification

View Details

Adhoc notifications can be sent to commitment owners using the Send Notification functionality.

Compliance Management

Agreements / MSA_Supriya (ICMMasterServicesAgreement_5)

Waiting For External Signature from Supriya Ashtikar

SMART LINKS DOWNLOAD COMPARE DOCUMENTS BROADCAST ...

Commitments


Bulk notifications can be sent

ADD COMMITMENT SEND BULK NOTIFICATION CLEAR GRID FILTERS

<input checked="" type="checkbox"/>	COMMITMENT ...	COMMITMENT STATUS	DESCRIPTION	BUSINESS OWNER	DUE DATE	CREATED DATE	RECURRIN...	INSTRUCT
<input checked="" type="checkbox"/>	Transaction	Overdue	Check the material delivery timelines.	Icertis Admin	2/7/2022	2/8/2022	true	👁 ...
<input checked="" type="checkbox"/>	Transaction	Not Completed	Review and approve the invoices	Finance User	2/14/2022	2/8/2022	false	👁 ...
<input checked="" type="checkbox"/>	Transaction	Not Completed	Check the material delivery timelines.	Icertis Admin	2/14/2022	2/8/2022	true	👁 ...

8 Items Per Page

1 to 3 of 3 items 1

- This feature is discussed in detail in a separate LMS course
-  Details are provided in Learn More Resources Section at the end of the module

Contributor in Team

- The business owner is added as a Contributor in the Team of the agreement

Waiting For External Signature from Supriya Ashtikar

SMART LINKS DOWNLOAD COMPARE DOCUMENTS BROADCAST ...

Team

All Approvers Signatories Core Extended

ADD NEW MEMBER REASSIGN ENABLE DISABLE REMOVE CLEAR GRID FILTERS

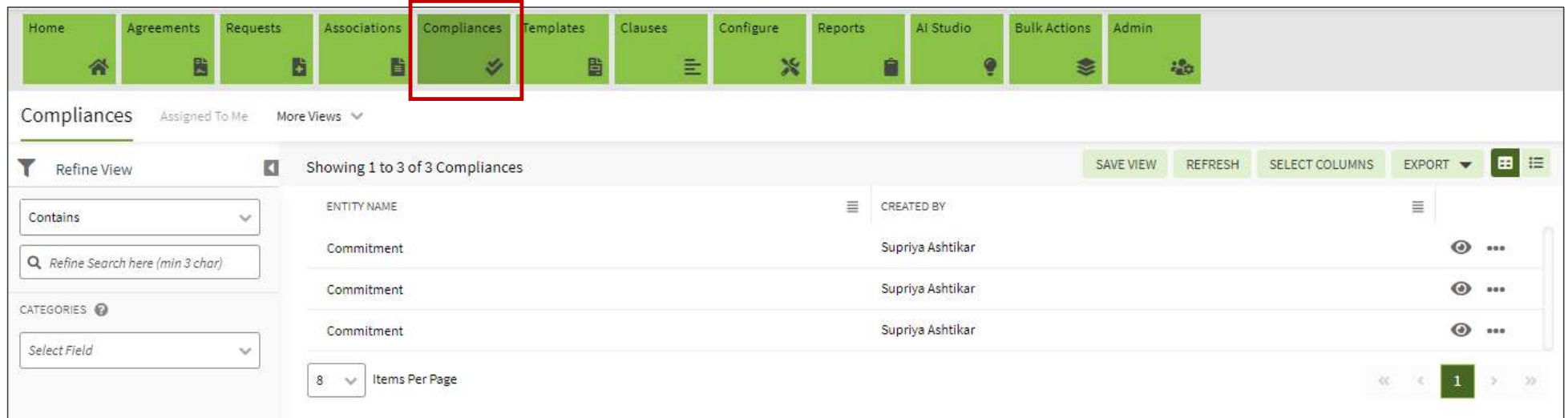
Refine Search Here...

<input type="checkbox"/>	USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATUS
<input type="checkbox"/>	Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1		
<input type="checkbox"/>	Finance User	No	financeuser007@icertis.com	Contributor	Step 1		
<input type="checkbox"/>	Icertis Admin	No	icertisadmin@icertis.com	Contributor	Step 1		
<input type="checkbox"/>	Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Approver	Step 10		
<input type="checkbox"/>	Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		Pending for 3 day(s) and 20 hour(s).
<input type="checkbox"/>	Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Internal Signatory	Step 10		

Team

Compliance Management

- The contributor can navigate to the **Compliance Management** tile to view the Commitments



The screenshot displays the Compliance Management interface. At the top, a navigation bar contains tiles for Home, Agreements, Requests, Associations, **Compliances** (highlighted with a red box), Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the 'Compliances' section is active, showing 'Assigned To Me' and 'More Views'. A 'Refine View' sidebar on the left includes a 'Contains' dropdown, a search bar, and a 'CATEGORIES' section with a 'Select Field' dropdown. The main content area displays a table with the following data:

ENTITY NAME	CREATED BY
Commitment	Supriya Ashtikar
Commitment	Supriya Ashtikar
Commitment	Supriya Ashtikar

At the bottom of the table, there is a '8 Items Per Page' dropdown and a pagination control showing '1'.

Compliance Management

- Select column action allows users to add required columns to view more details about the commitment record

The screenshot displays the 'Compliances' section of a software interface. At the top, a navigation bar contains several tabs: Home, Agreements, Requests, Associations, **Compliances** (highlighted with a red box), Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the 'Compliances' section is titled, with sub-headers 'Assigned To Me' and 'More Views'. A 'Refine View' sidebar on the left includes a 'Contains' dropdown, a search bar with the placeholder 'Refine Search here (min 3 char)', and a 'CATEGORIES' section with a 'Select Field' dropdown. The main content area shows a table with the heading 'Showing 1 to 3 of 3 Compliances'. The table has columns for 'ENTITY NAME' and 'CREATED BY'. The data rows show three 'Commitment' records, all created by 'Supriya Ashtikar'. Each row has an eye icon and a three-dot menu icon. Above the table, there are buttons for 'SAVE VIEW', 'REFRESH', **SELECT COLUMNS** (highlighted with a red box), and 'EXPORT'. At the bottom, there is a pagination control showing '8 Items Per Page' and a page number '1'.

ENTITY NAME	CREATED BY
Commitment	Supriya Ashtikar
Commitment	Supriya Ashtikar
Commitment	Supriya Ashtikar

Compliance Management

Select Columns

ATTRIBUTE LIST

Q Search Attribute

Actual Completion Date
Agreement Code
Agreement Name
Commitment Code
Commitment Creator
Commitment State
Commitment Types
ContractType Entity Name
Creation Date
Due Date Reminder
End Date
Expected Completion Date
Frequency

SELECTED ATTRIBUTE

Q Search Attribute

Entity Name

Created By

Business Owner

Commitment Description

Action Details : Commitment Status

Action Details : Action Taken

Action Details : Action Date

SELECT the required columns from Attribute List to Selected Attribute list

*Bulk selection of columns and drag drop is possible

APPLY

Compliance Management

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

Bulk Actions

Admin

Compliances

Assigned To Me

More Views

Refine View

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

Showing 1 to 3 of 3 Compliances

SAVE VIEW

REFRESH

SELECT COLUMNS

EXPORT

ENTITY NAME	CREATED BY	BUSINESS OWNER	COMMITMENT DESC...	ACTION DETAILS : C...	ACTION DETAILS : AC...	ACTION DETAILS : AC...
Commitment	Supriya Ashtikar	Icertis Admin	Check the material del...			
Commitment	Supriya Ashtikar	Icertis Admin	Check the material del...			
Commitment	Supriya Ashtikar	Finance User	Review and approve t...			

8

Items Per Page



1

The selected columns are displayed on the list to get more details about the commitment record.

Compliance Management

- The contributor can select the agreement and navigate to the Commitments section
- Example: Logged in user is **Icertisadmin** who is a business owner, need to take an action on the commitment.

Waiting For External Signature from Supriya Ashtikar

SMART LINKS DOWNLOAD COMPARE DOCUMENTS BROADCAST ...  

Commitments

ADD COMMITMENT SEND BULK NOTIFICATION CLEAR GRID FILTERS

<input type="checkbox"/>	COMMITMENT ...	COMMITMENT STATUS	DESCRIPTION	BUSINESS OWNER	DUE DATE	CREATED DATE	RECURRIN...	INSTRUCT
<input type="checkbox"/>	Transaction	Overdue	Check the material delivery timelines					
<input type="checkbox"/>	Transaction	Not Completed	Review and approve the invoices					
<input type="checkbox"/>	Transaction	Not Completed	Check the material delivery timelines					

8 Items Per Page

1 to 3 of 3 items << < 1 > >>

Copy Commitment

Take action on commitment

View Details

The business owner will have to close the commitment by using “Take action on commitment”

Copy Agreement

Copy Agreements

- Users can create a copy of an existing agreement with or without other entities

The screenshot displays the Icertis user interface for managing agreements. The top navigation bar shows the current agreement is 'MSA_Supriya (ICMMasterServicesAgreement_5)' with a status of 'Waiting For External Signature from Supriya Ashtikar'. Action buttons include SMART LINKS, DOWNLOAD, COMPARE DOCUMENTS, BROADCAST, and a menu icon. A left sidebar contains a 'Menu' with options: Dashboard, Summary (highlighted), Details, Versions, History, and Associations. The main content area is titled 'Summary' and shows 'CREATED BY: Supriya Ashtikar'. Below this is a list of sections: 1. General Information, 2. Vendor Information, 3. Contract Term, and 4. Signatory Information. A purple callout box states: 'Using the Copy Record functionality, new agreements can be created:'. On the right, a dropdown menu is open, showing options: Agreement Deviation Report, Compare Clause Changes, Recall, and 'Copy Record' (which is highlighted with a red rectangle). The organization name '/icertis' is also visible.



- * This feature is discussed in detail in a separate LMS course
- Details are provided in Learn More Resources Section at the end of the module

Copy Agreements

Copy Record

☒ MSA Supriya

☐ Associations

☐ Master Services Agreement

☐ ICMMasterServicesAgreement_17 (MSA_Supriya)

↑

^

^

Using the Copy Record functionality, new agreements can be created:

- With or without the parent record (in case of peer association)
- With or without supporting documents (child associations)
- With or without commitments

COPY

Agreement Dashboard

Agreement Dashboard

Access to various agreement content from a single page, saving several navigation steps

Contract overview widget shows agreement details e.g., Expiry dates, Created by etc.

Agreement details like Commitments, Associations, Team are available on a single page

Reports widget contains various reports to get the agreement insights

- Attribute value report
- Detailed Report
- Clause Deviation Report

Agreement Dashboard

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications0

Statement of Work0

Document List

Deviations0

Amendments0

Commitments0

AI Insights

AI Studio

Agreement Clauses

Team

Clause Approver0

Notes0

Default Agreement Dashboard

REFRESH

Contract Overview

CREATED BY
Supriya Ashtikar

CREATED ON
1/6/2022

ORGANIZATION UNIT
/Icertis

AGREEMENT CODE
ICMMasterServicesAgreement_5

CONTRACT NAME
MSA_Supriya

VENDOR NAME
Acme Corporation

EXPIRY DATE
7/10/2022

EFFECTIVE DATE
1/10/2022

SIGNATURE TYPE
Electronic Signature

View More

Reports

Attribute Value Report

Detailed Report

Clause Deviations Report

Associations | 0 record

AGREEMENT CODE	NAME	CREATED BY	CREATED DATE	ENTITY NAME
Nothing to show here, yet.				

Team | 6 records

USER NAME	BY RULE	EMAIL ID	TEAM ROLE	STEP NUMBER
Supriya Ash...	No	supriya.ashtikar@i...	Primary Owner	Step 1
Finance User	No	financeuser007@i...	Contributor	Step 1

Commitments | 3 records

COMMITMENT TYPE	COMMITMENT STATUS	DESCRIPTION	BUSINESS OWNER	DUE DATE	CREATED DATE	RECURRING COMMIT...	INSTRUCTIONS
Transaction	Overdue	Check the material deli...	Icertis Admin	2/7/2022	2/8/2022	true	👁️ ...
Transaction	Not Completed	Review and approve th...	Finance User	2/14/2022	2/8/2022	false	👁️ ...
Transaction	Not Completed	Check the material deli...	Icertis Admin	2/14/2022	2/8/2022	true	👁️ ...

Summary

Associated Documents

- The supporting documents can be added as Associations.
- The associations can have constraints prerequisite, post requisite or none
- It can be marked as mandatory document
- The associations can be conditional

Collaboration

- The messaging with the internal / external parties is facilitated using collaboration
- Multiple topics can be created with various participants

Commitments

- The fulfillment of the agreement task can be tracked via commitments

Agreement dashboard

- Access to various agreement content from a single page, saving several navigation steps



Thank You