

Agreement Workflow

Icertis Contract Intelligence
Product Training



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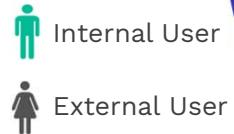
04 Expiry



Agenda – Part A

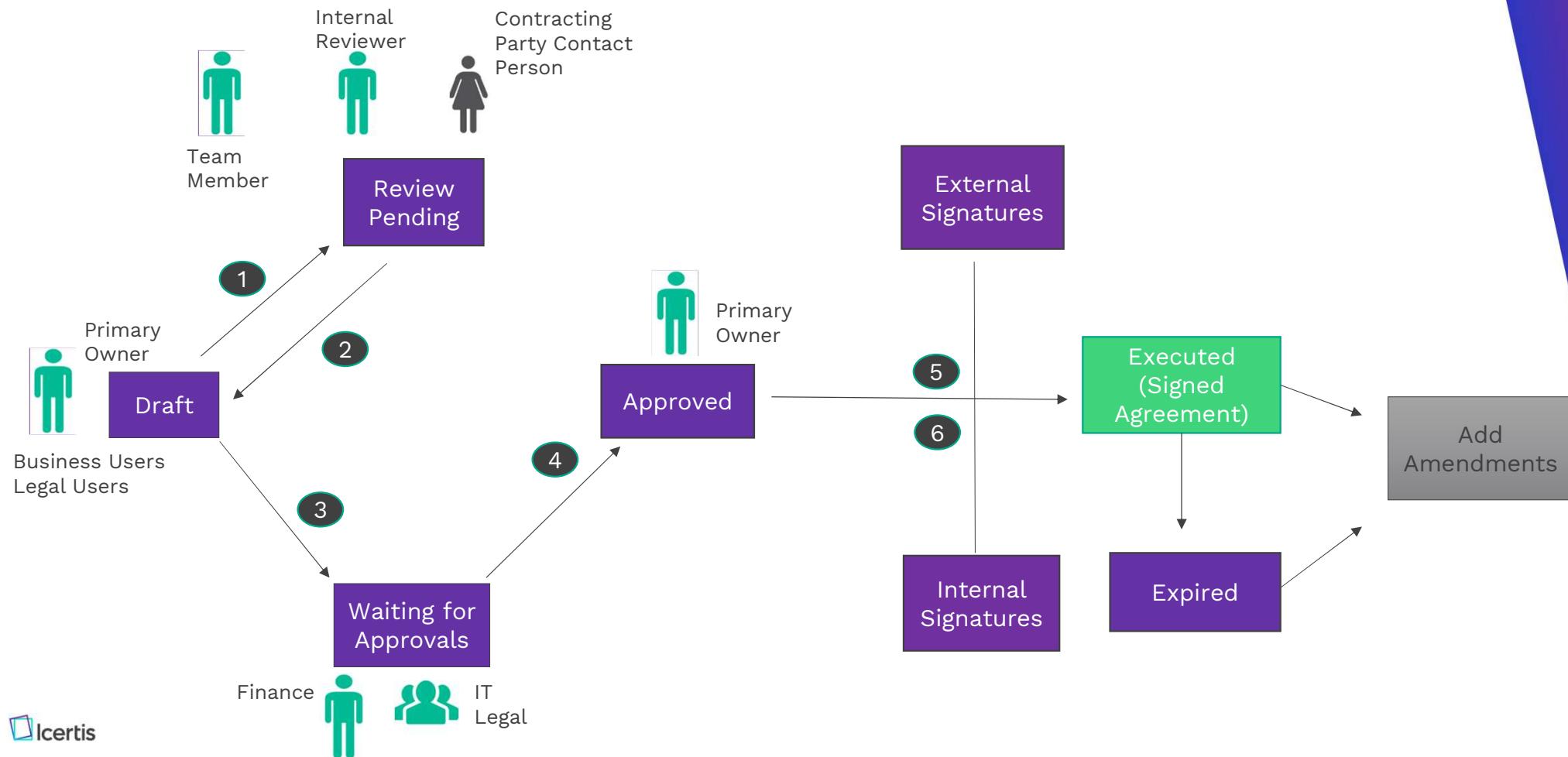
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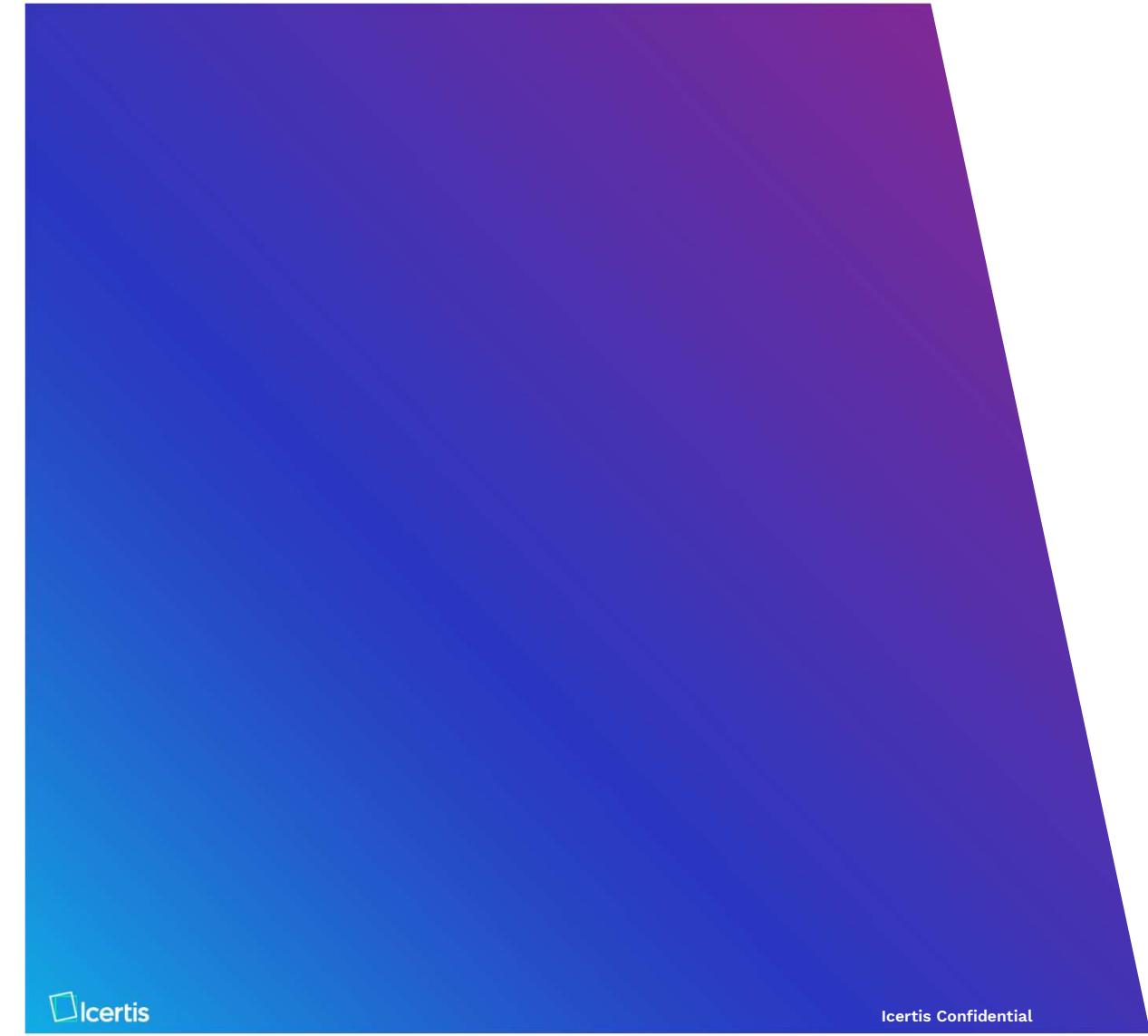




Internal User
External User

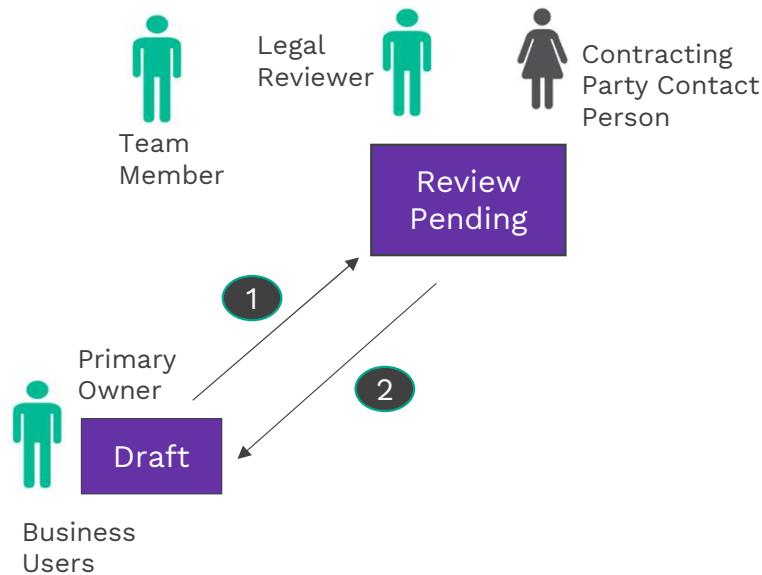
Agreement Workflow Steps





1. Review and Negotiation

Review and Negotiations



- **Review-** Before sharing the document with the external counter party, it is best to get the document reviewed internally. Use Request Review to send the document internally to various users for contract review
- **Broadcast-** Allows users to share the contract document with external counter party members. This feature is used for Negotiations.

Reviews

- The user can send the Agreement to the internal/external parties for review and negotiation

The screenshot shows a web-based document management system. At the top, there's a header with the title "Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)" and a status indicator "Draft". Below the header, there's a "Summary" section containing basic metadata: "CREATED BY" (Supriya Ashtikar), "CREATED ON" (1/10/2022), and "ORGANIZATION UNIT" (/icertis). To the right of the summary is a vertical toolbar with icons for different actions. A red box highlights the "Request Review" button in this toolbar. A callout bubble with a purple background and white text provides a detailed description of the feature: "Request Review: The contract creator can send the document for review to the business reviewer or legal reviewer." At the bottom of the screen, there's a footer bar with links for "About" and the iCertis logo, along with a copyright notice: "Copyright © 2022 iCertis Inc."

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Draft

OPEN IN OFFICE FOR THE WEB DOWNLOAD

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

Request Review: The contract creator can send the document for review to the business reviewer or legal reviewer.

About

iCertis

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Request Review

- The Request Review action allows to select either internal user or external user with login privileges
- It can be sent for review to multiple users

Request Review

Internal Third Party

Refine View All More Views

EMAIL ID FIRST NAME LAST NAME

EMAIL ID	FIRST NAME	LAST NAME
<input checked="" type="checkbox"/> supriya.ashtikar@icertis.com	Supriya	Ashtikar
<input type="checkbox"/>	Approvers	
<input type="checkbox"/>	Manager	
<input type="checkbox"/> clmadmin@waadicm.onmicrosoft.com	CLM	Admin
<input type="checkbox"/> icertisadmin@icertis.com	Icertis	Admin
<input type="checkbox"/>	Reviewer Group	User
		Ananth

SAVE VIEW REFRESH SELECT COLUMNS EXPORT

Add notes to provide instructions to the reviewer

CLEAR ALL

Add Note

Please review

SEND

Request Review

Select approval process for User Groups

Internal Third Party

Refine View All More Views

Contains EMAIL ID: supriya.ashtikar@icertis.com

Refine Search here (min 3 char)

CATEGORIES

User group selected.

	Approvers	Last Name
<input checked="" type="checkbox"/>	Manager	Ashtikar
<input type="checkbox"/>	CLM	
<input type="checkbox"/>	Icertis	
<input type="checkbox"/>	Reviewer Group	
<input type="checkbox"/>	Finance	
<input type="checkbox"/>	Harini	

Items Per Page: 8 Showing 1 to 8 of 12 records

Request Review

- If a user group is selected, the number of reviewers can be selected

Select approval process for User Groups		
GROUP NAME	COUNT OF USERS	NEED APPROVAL FROM
Approvers	2	<input checked="" type="radio"/> All <input type="radio"/> Any Minimum Required <input style="width: 20px; height: 20px; border: none; background-color: #ccc; vertical-align: middle;" type="button" value="^"/> <input style="width: 20px; height: 20px; border: none; background-color: #ccc; vertical-align: middle;" type="button" value="v"/>

‘All’ signifies that all the users listed in the count must review.

If ‘Any’ is selected , the minimum number of reviewers can be set

Request Review

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Review Pending from Supriya Ashtikar

SMART LINKS LOCK OPEN IN OFFICE F...

Download Delegate Confidential Compare Documents ...

Summary

CREATED BY Supriya Ashtikar 1/10/2022 ORGANIZATION UNIT /icertis

The agreement status displays **Review Pending**.

1. General Information
2. Vendor Information
3. Contract Term
4. Signatory Information

At this point, the contract creator can **Cancel Request**.

Cancel Request Broadcast Agreement Deviation Report Compare Clause Changes Upload Document Approve Reject On Hold Cancel Copy Record

About

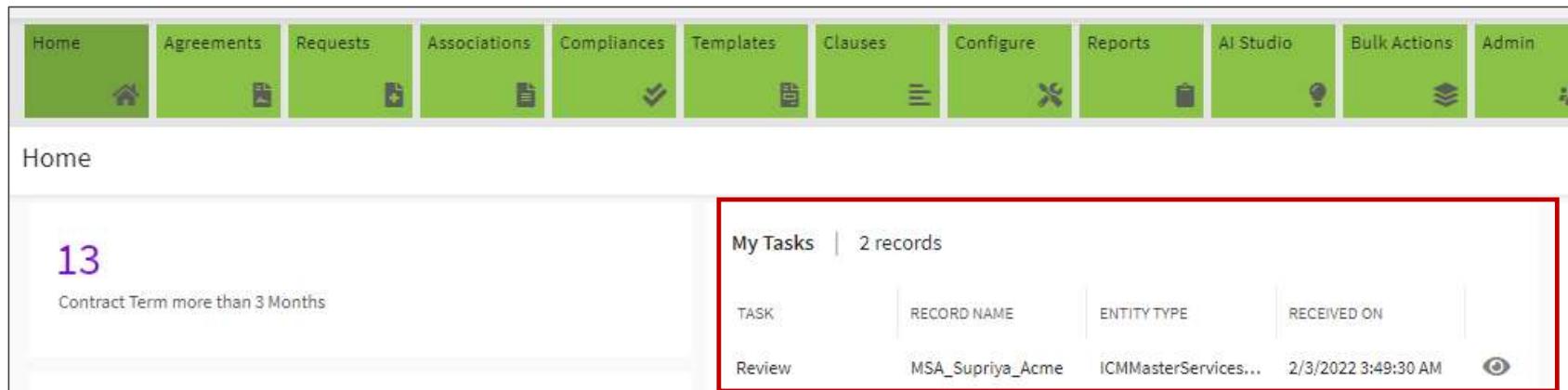
Reviewer added to the Team

- The reviewer is added to the Team as the “Internal Reviewer”

The ‘ByRule’ column displays if the Stakeholder is added via Rule or adhoc.

User Name	BY RULE	Email ID	Team Role	Step Number	Additional Information	Action
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10		
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property	
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		
Finance Manager	Yes	financemanager@icertis.com	Internal Signatory	Step 10		
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Internal Reviewer	Step 1		

Request Task



The screenshot shows the Icertis software interface. At the top is a navigation bar with green buttons labeled: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar is a header "Home". On the left, there is a purple box containing the number "13" and the text "Contract Term more than 3 Months". To the right of this is a red-bordered box titled "My Tasks | 2 records". Inside this box is a table with four columns: "TASK", "RECORD NAME", "ENTITY TYPE", and "RECEIVED ON". The table contains one row with the values: "Review", "MSA_Supriya_Acme", "ICMMasterServices...", and "2/3/2022 3:49:30 AM".

TASK	RECORD NAME	ENTITY TYPE	RECEIVED ON
Review	MSA_Supriya_Acme	ICMMasterServices...	2/3/2022 3:49:30 AM

The reviewer is notified by an email.
Additionally, the reviewer sees a pending task in the **Tasks** list on the **Dashboard**.

Request Review Pending

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Review Pending from Supriya Ashtikar

SMART LINKS LOCK OPEN IN OFFICE FC

Download Delegate Confidential Compare Documents Cancel Request Broadcast Agreement Deviation Report Compare Clause Changes Upload Document Approve Reject On Hold Cancel Copy Record

The agreement displays status **Review Pending**.

CREATED BY Supriya Ashtikar

CREATED ON 1/10/2022

ORGANIZATION UNIT /icertis

Summary

1. General Information
2. Vendor Information
3. Contract Term
4. Signatory Information

About

The reviewer can make changes to the contract document.
If the agreement document has the required language, the reviewer can **Approve** the agreement.

Approve/ Reject Review

- While approving or rejecting the agreement the reviewer can add notes to share with the creator.

Add Note - Approve

Agreement review completed.

Note:

- A maximum of 1000 characters are allowed.
- If the comments contain a text starting with "<" (e.g. <abc), the comment will be removed due to security reasons. To avoid this, please add a space after "<".

ADD

Approve/ Reject Review

- While rejecting the agreement, the reviewer must provide a reason code.

Add Note - Reject

Agreement changes required

Note:

- A maximum of 1000 characters are allowed.
- If the comments contain a text starting with "<" (e.g. <abc>), the comment will be removed due to security reasons. To avoid this, please add a space after "<".

* REASON CODE 1001-Incorrect Attribute Values

ADD

Request Review

The screenshot shows a user interface for managing agreements. On the left, there's a sidebar with various sections like 'All Associations', 'Amendments', and 'Commitments'. The main area displays a summary of an agreement titled 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. The status bar at the top indicates the document is in 'Draft' mode, which is highlighted with a red box. The summary section includes details such as 'CREATED BY Supriya Ashtikar', a table of contents with four items (1. General Information, 2. Vendor Information, 3. Contract Term, 4. Signatory Information), and an 'ORGANIZATION UNIT /icertis'. A large callout bubble in the center-right area contains the text: 'After the review is complete, the agreement is submitted to the creator and the agreement status returns to Draft.'

Request Review

The screenshot shows the iCertis platform interface for a draft agreement titled "MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". The left sidebar contains various navigation links such as All Associations, Communications, Statement of Work, Document List, Deviations, Amendments, Commitments, AI Insights, AI Studio, Agreement Clauses, Team, Clause Approver, and Notes. The "Notes" link is highlighted with a red border. The main content area is titled "Notes" and displays a grid of review comments. The grid columns are labeled: EVENT, USER NAME, NOTE, DATE AND TIME, ROLE, USER EMAIL, and REASON CODE. There are two items in the grid:

EVENT	USER NAME	NOTE	DATE AND TIME	ROLE	USER EMAIL	REASON CODE
Agreement Reviewed	Supriya Ashtikar	Agreement review completed.	2/3/2022 4:20:20 AM	Primary Owner, External Signator...	supriya.ashtikar@icertis.com	
Document Uploaded	Supriya Ashtikar	Changes approved.	2/1/2022 3:18:46 PM	Primary Owner, Internal Signator...	supriya.ashtikar@icertis.com	

A purple callout box points to the "Notes" section with the text: "The Notes section shows the review comments."

Negotiations

- The user can send the Agreement to the internal/external parties for negotiation

The screenshot shows the Icertis contract management interface for a document titled "MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". The document status is "Draft". The left sidebar includes sections for Menu, Dashboard, Summary (which is selected and highlighted in green), Details, Versions, History, Associations, All Associations, Communications (1 item), Statement of Work (0 items), Document List, Deviations, and Amendments (0 items). The main content area displays the "Summary" tab with fields for CREATED BY (Supriya Ashtikar), CREATED ON (1/10/2022), and ORGANIZATION UNIT (/certis). Below this are four sections: 1. General Information, 2. Vendor Information, 3. Contract Term, and 4. Signatory Information. The top right features standard document actions: OPEN IN OFFICE FOR THE WEB, DOWNLOAD, UPLOAD DOCUMENT, EDIT, SEND FOR APPROVAL, CANCEL, and more. A vertical menu on the far right lists Smart Links (Lock, Download All, Confidential, Compare Documents, Collaborate, Broadcast, Broadcast [highlighted with a red box]), and other options like Agreement Deviation Report, Compare Clause Changes, Assemble Contract, Request Review, On Hold, Delete, and Copy Record.

Broadcast – The contract can be sent to the external party for negotiations.

Broadcast

The broadcast feature sends an email to the selected users.

Broadcast

Details Attachments

TO: [Redacted] 

CC: [Redacted] 

BCC: [Redacted] 

SUBJECT: [Redacted]

MESSAGE:

(inherited font) **(inherited size)** **A** **Format**

Include agreement link in this message

BROADCAST

Click the User icon to identify and select the third-party user

Broadcast

Select User

Internal **Third Party** Role

Refine View All More Views

Contains Refine Search here (min 3 char)

CATEGORIES Select Field

EMAIL ID FIRST NAME LAST NAME

c-mmittal@oxygenexp.com Manasi Mittal

keskr ridge@oxygenexp.com Kelley Eskridge

c-dipshib@oxygenexp.com Dipshi Bhardwaj

ContactUs@indus.com Vendor VanDyke

Nilesh

Items Per Page: 8

Identify and select the third-party user

External user can be created and added to the list of Third-Party users

ADD EXTERNAL USER

Create External User

* FIRST NAME

* LAST NAME

* EMAIL ADDRESS

* LANGUAGE

English (United States)

PHONE NUMBER

By adding phone number, I confirm capturing user consent to receive important text messages from ICI

CountryCode-Number

ICERTIS CONFIDENTIAL

```
graph LR; A[Select User] --> B[Third Party]; B --> C[Identify and select the third-party user]; C --> D[ADD EXTERNAL USER]; D --> E[Create External User]
```

Broadcast

Broadcast

Details **Attachments**

CONTRACT TYPE	NAME	VERSION NO.	DOCUMENT FORMAT	NOTES
ICMMasterServicesAgreement	MSA_Supriya	4	Docx	
ICMMasterServicesAgreement	MSA_Supriya	4	Pdf	
ICMMasterServicesAgreement	MSA_Supriya	3	Docx	
ICMMasterServicesAgreement	MSA_Supriya	3	Pdf	
ICMMasterServicesAgreement	MSA_Supriya	2	Docx	
ICMMasterServicesAgreement	MSA_Supriya	2	Pdf	
ICMMasterServicesAgreement	MSA_Supriya	1	Docx	
ICMMasterServicesAgreement	MSA_Supriya	1	Pdf	

The broadcast feature allows users to add specified attachments
Attachments gives you a view of all agreement versions

BROADCAST

Broadcast Sequence of Events

- If the vendor/ supplier needs to review the agreement before the approval process is initiated,
 - Broadcast the agreement to the supplier contact person

OR

- Download the agreement and email it to the supplier contact person

The primary owner broadcasts the agreement (Word format) to the supplier for review.

Supplier sends the redlined version back to the primary owner.

Deviation (if any) is triggered, and a deviation approver is added to the agreement team automatically

Primary owner uploads the updated agreement file to ICI.

Upload of Broadcast Agreement

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Draft

OPEN IN OFFICE FOR THE WEB DOWNLOAD **UPLOAD DOCUMENT** EDIT SEND FOR APPROVAL ...

Summary

CREATED BY Supriya Ashtikar CREATED ON 1/10/2022 ORGANIZATION UNIT /icertis

1. General Information
2. Vendor Information
3. Contract Term
4. Signatory Information

Click Upload Document to upload the version sent by the supplier.



Upload of Broadcast Agreement

Upload Document

SELECT FILE

Click Upload Document to upload the version sent by the supplier.

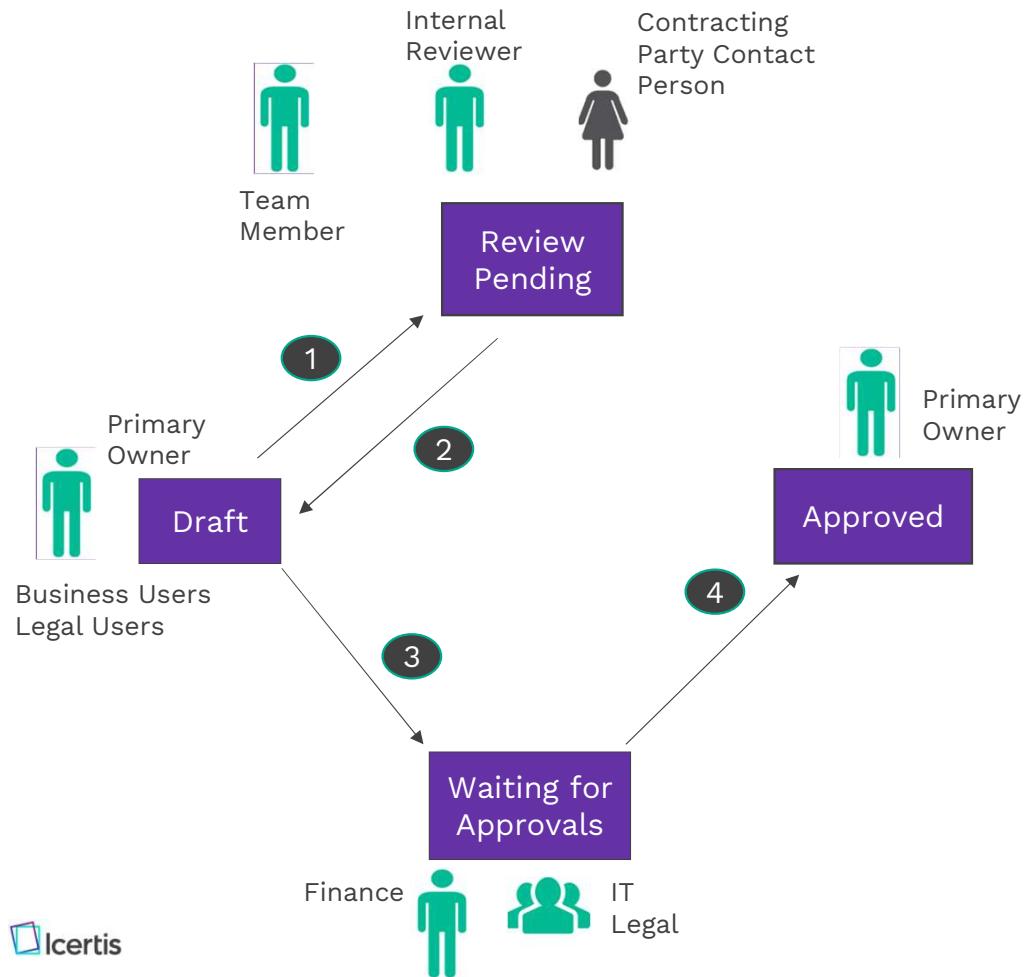
Add Note

Select the file from local system and upload.

UPLOAD

2. Approvals

Approvals



- Once the review is complete, the agreement is ready to be sent for approval.
- ICI supports parallel and sequential approvals
- If the contract is approved by all approvers, the status of the contract changes to Approved.

Check Notes

- The Notes section contains important information shared by members reviewing or approving the agreement.
- Refer to the Notes prior to initiating the approval cycle.

The screenshot shows the Icertis platform interface for managing agreements. The top navigation bar displays the path 'Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)' and indicates the document is in 'Draft' status. The main content area is titled 'Notes' and lists two entries:

EVENT	USER NAME	NOTE	DATE AND TIME	ROLE	USER EMAIL	REASON CODE
Agreement Reviewed	Supriya Ashtikar	Agreement review completed.	2/3/2022 4:20:20 AM	Primary Owner, External Sig...	supriya.ashtikar@icertis.com	
Document Uploaded	Supriya Ashtikar	Changes approved.	2/1/2022 3:16:46 PM	Primary Owner, Internal Signi...	supriya.ashtikar@icertis.com	

The notes section is highlighted with a red box. At the bottom left of the page, there is a green button labeled 'Notes' with a count of 2, also highlighted with a red box.

Identify Approver from Team

- The Progress view shows the stages of the approvals

The screenshot shows the Agreements module interface for the contract 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. The 'Team' tab is selected in the sidebar. The main area displays the 'APPROVAL STATUS' as 'Step 10 pending'. The 'Progress View' section shows the following steps:

Step	Status	Approver
Step 5	Approved	
Step 10	Waiting	Finance User

The 'Team' tab in the sidebar is highlighted with a red box. The 'Progress View' button in the top right is also highlighted with a purple box.

- The agreement **Team** contains the list of approvers for the contract.
- Always look at the agreement Team to identify:
 - Approvers and
 - Stage of approvals

Deviation Approver added to the Team

- The Deviation Approver is added to the team when a deviation occurs

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Menu

Document List

Deviations 1

Amendments 0

Commitments 0

AI Insights

AI Studio

Agreement Clauses

Team

APPROVAL STATUS Step 5 pending

GENERATE APPROVE (0 OF 2 STEPS COMPLETED) CHECK & SIGN

Step 5 Waiting 1 of 1 required DEVIATION APPROVER Step 10 Not Started Supriya Ashtikar

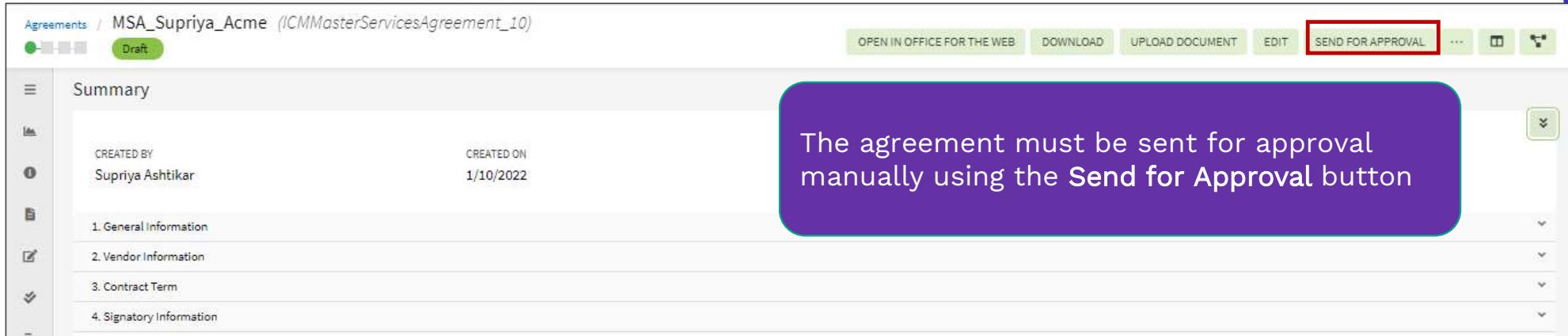
Step 10 Not Started

EXTERNAL SIGNATURE Step 10 Not Started

INTERNAL SIGNATURE Step 10 Not Started

Sending Agreements for Approval

- The next step is to send the agreement for approval
- The contract creator (Primary Owner) should send the contract for approvals only when the review is completed



The screenshot shows the Icertis platform interface for managing agreements. At the top, it displays the path 'Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)' and indicates the document is in 'Draft' status. Below this, there's a summary section with details like 'CREATED BY' Supriya Ashtikar and 'CREATED ON' 1/10/2022. A sidebar on the left lists sections such as 'General Information', 'Vendor Information', 'Contract Term', and 'Signatory Information'. At the top right, there are several buttons: 'OPEN IN OFFICE FOR THE WEB', 'DOWNLOAD', 'UPLOAD DOCUMENT', 'EDIT', and a red-bordered 'SEND FOR APPROVAL' button. A callout bubble with a purple background and white text points to the 'SEND FOR APPROVAL' button, stating: 'The agreement must be sent for approval manually using the **Send for Approval** button'.

Adding Approvers

- After the agreement is reviewed, the next step is to send the agreement for approval
- Approvers are added to the team:

By Rules

- Approval rules define users for a specific contract type

Ad-hoc

- Approvers are manually added to the agreement team

- When the Primary Owner sends the agreement for approval, the agreement goes to **Waiting for Approval** status

Approver added By Rule

- The By Rule column shows the approver is added by Rule

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Waiting For Approval from Finance User

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

USER NAME	BY RULE	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1	
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10	
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10	
Finance Manager	Yes	financemanager@icertis.com	Internal Signatory	Step 10	

Rule used for Approver Selection

The screenshot shows the Icertis platform interface. The top navigation bar includes Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk Actions. The main menu on the left lists Deviations (1), Amendments (0), Commitments (0), AI Insights, AI Studio, Agreement Clauses, Team (selected), Clause Approver (0), Notes (2), and Collaboration.

The current page is 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A green banner at the top indicates 'Waiting For Approval from Finance User'.

The 'Team' section displays a list of users:

USER NAME	BY RULE	EMAIL ID	TEAM ROLE
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner
Finance User	Yes	financeuser007@icertis.com	Approver
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory
Finance Manager	Yes	financemanager@icertis.com	Internal Signatory

A red box highlights the 'Finance User' row. A modal window titled 'Finance User was added by following rule...' contains the approval rule definition:

Approval Rule
Rule 1
IF
Contract Type Name CONTAINS Master

Adding adhoc approvers

- The approver added by the End User are highlighted as No in the By Rule column

Add adhoc member to the team

USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATUS
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1		
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10		Pending for less than an hour.
Sheetal Sankpal	No	sheetal.sankpal@icertis.com	Approver	Step 10		Pending for less than an hour.
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property	✓
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		

Adding ad hoc approvers

- If the approvers are added via User Group, then the end user can choose how many approvers can approve.

The screenshot shows the 'Add User' interface with the following details:

- SELECT ROLE:** Approver
- STEP NUMBER:** 10
- Refine View:** All
- Search:** Refine Search here (min 3 char)
- CATEGORIES:** Select Field
- Approver Selection:** A list of users and groups:
 - supriya.ashtikar@icertis.com
 - Approvers** (selected, highlighted with a red border and a purple callout bubble labeled "User group selected")
 - Manager
 - CLM
 - Icertis
 - Reviewer Group
 - Finance
- Buttons:** CLEAR ALL, Items Per Page (set to 8), NEXT (highlighted with a red border)
- Footer:** Icertis logo, 1 selected, Send Notification checked, NEXT button

Adding ad hoc approvers

Select approval process for User Groups

GROUP NAME	COUNT OF USERS	NEED APPROVAL FROM
Approvers	2	<input type="radio"/> All <input checked="" type="radio"/> Any Minimum Required 1

The options are to select 'All' or 'Any'.
When selected 'Any' the minimum limit can be set

1 selected

PREVIOUS ADD

Sequence of Approver

- The Step Numbers decide the sequence how the agreements will be sent for approvals

The screenshot shows the 'Agreements' interface for the 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)' document. The top navigation bar includes 'SMART LINKS', 'OPEN IN OFFICE FOR THE WEB', 'DOWNLOAD ALL', 'DOWNLOAD', and other standard file operations. The main area is divided into sections: 'Team', 'APPROVAL STATUS' (Step 10 pending), 'GENERATE' (Primary Owner: Supriya Ashtikar), 'APPROVE (1 OF 3 STEPS COMPLETED)' (Step 5 Approved, Step 10 Waiting), and 'CHECK & SIGN' (EXTERNAL SIGNATURE: Step 10 Not Started, INTERNAL SIGNATURE: Step 10 Not Started). A red box highlights the 'APPROVE' section, specifically the Step 10 row.

APPROVE (1 OF 3 STEPS COMPLETED)	
Step 5	Approved
Step 10	Waiting
APPROVER	
1 of 1 required	
<input type="checkbox"/> Finance User	
1 of 1 required	
<input type="checkbox"/> Sheetal Sankpal	

Deviation Approval Pending

- The Status is Deviation Approval Pending when the deviation approver has step number lower than the Approver

The screenshot shows a screenshot of the Icertis platform interface. The top navigation bar displays the path "Agreements / MSA Supriya Acme (ICMMasterServicesAgreement_10)". Below the path, there are several buttons: "Deviation Approval Pending from Supriya Ashtikar" (highlighted with a red box), "SMART LINKS", "OPEN IN OFFICE FOR THE WEB", "DOWNLOAD ALL", "DOWNLOAD", "...", and icons for "Print" and "Email". On the left side, there is a vertical sidebar with menu items: "Menu", "Dashboard" (selected), "Summary" (selected), "Details", "Versions", "History", and "Associations". The main content area is titled "Summary" and contains the following information:

- CREATED BY: Supriya Ashtikar
- CREATED ON: 1/10/2022
- ORGANIZATION UNIT: /icertis

Below this, there is a list of sections:

1. General Information
2. Vendor Information
3. Contract Term
4. Signatory Information

Deviation Approver

- The Deviations tab list the details of the clauses that are deviated
- The Deviation Approver can approve or reject the changes

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Deviations Approval Pending from Supriya Ashtikar

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Menu Deviations

All Associations Communications Statement of Work Document List Deviations Amendments Commitments

Intellectual Property System Deviation
Deviated By Supriya Ashtikar (2/1/2022 3:16:44 PM) • Requires Approval

SAVE CHANGES CLEAR ALL APPROVE ALL REJECT ALL ADD DEVIAITON ADD DEVIAITON APPROVER APPROVE REJECT

For multiple clauses, the Deviation can Approve or Reject All in a single click

Deviation Details

- The Deviation Approver can view the clause changes

Deviation Details

✖

Intellectual Property

STANDARD/APPROVED CLAUSE TEXT

DEVIATED CLAUSE TEXT

Intellectual Property "Intellectual Property Rights" means all intellectual and industrial property rights of Company which include rights to inventions and patents for inventions, including reissues thereof and continuations in part, copyright, designs and industrial designs, trademarks, know-how, trade secrets and confidential information, and other proprietary rights. Subject to the provisions of Statement of Work, the Supplier agrees that Company shall be the exclusive owner of all Intellectual Property Rights howsoever created or developed by the Supplier, whether by it alone or jointly or with the contribution or assistance of others arising out of its engagement with Company, including without limitation all Intellectual Property Rights in the Deliverables. The Supplier further agrees that it has no rights in any such Intellectual Property Rights and hereby assigns to Company all rights, title and interest that may accrue to the Supplier as a result of its engagement with Company. Supplier information.

PREVIOUS COMMENTS

View the clause changes in Standard and deviated clause text

COMMENTS

SAVE

Agreement Waiting for Approvals

- When the deviation approval is done, the agreement is sent directly to the approver

The screenshot shows the Icertis platform interface for an agreement named "MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". The status bar at the top indicates "Waiting For Approval from Finance User". A callout bubble highlights this status with the text: "The agreement status is now Waiting For Approval." On the right side, a context menu is open, and another callout bubble highlights the "Recall" option with the text: "The Primary Owner can recall the contract from approvals using the Recall button". The "Recall" option is also highlighted with a red box.

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Finance User

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications

CREATED BY: Supriya Ashtikar

CREATED ON: 1/10/2022

ORGANIZATION U: /icertis

Confidential

Compare Documents

Broadcast

Agreement Deviation Report

Compare Clause Changes

Recall

On Hold

Cancel

Copy Record

The agreement status is now Waiting For Approval.

The Primary Owner can recall the contract from approvals using the Recall button

Agreement Waiting for Approvals

- When clauses are not modified, no deviations are triggered. The agreement is sent to the Approver

Agreements / MSA_Supriya (ICMMasterServicesAgreement_8)

Waiting For Approval from Finance Manager

Statement of Work 0 +

Document List

Deviations 0

Amendments 0

Commitments 0

AI Insights

AI Studio

Agreement Clauses

Team

APPROVAL STATUS Step 10 pending

GENERATE APPROVE (0 OF 1 STEPS COMPLETED) CHECK & SIGN

Primary Owner Supriya Ashtikar

Step 10 Waiting APPROVER 1 of 1 required Finance Manager

EXTERNAL SIGNATURE There are no external signatories in the team

INTERNAL SIGNATURE There are no internal signatories in the team

The agreement's Team indicates that the agreement is Waiting for the approver.

Waiting for Approval Status- Chevron View

The screenshot shows the icertis platform interface for an 'Agreements' view. A specific agreement titled 'MSA_Training (ICMMasterServicesAgreement_15)' is selected. The status bar at the top indicates 'Waiting For Approval from Supriya Ashtikar'. On the right side, a 'Workflow Status' panel is displayed, showing the following steps:

- Agreement Created (2/2/2022 9:41:29 AM) Primary Owner: Supriya Ashtikar
- Agreement Published (2/2/2022 9:41:46 AM) Primary Owner: Supriya Ashtikar
- Approve - Step 10** (PENDING FOR LESS THAN AN HOUR. Approver (1 of 1 required))
 - Supriya Ashtikar
- External Signature - Step 10 (External Signatory (1 of 1 required))
 - Supriya Ashtikar
- Internal Signature - Step 10 (Internal Signatory (1 of 1 required))
 - Supriya Ashtikar

A purple callout box labeled 'Chevron View' points to the status bar at the top. A red box highlights the 'Approve - Step 10' step in the workflow status panel.

Agreements / MSA_Training (ICMMasterServicesAgreement_15)
Waiting For Approval from Supriya Ashtikar

CREATED ON
2/2/2022

ORGANIZATION UNIT
/icertis

VIEW TEAM

Workflow Status

- Agreement Created
2/2/2022 9:41:29 AM
Primary Owner
Supriya Ashtikar
- Agreement Published
2/2/2022 9:41:46 AM
Primary Owner
Supriya Ashtikar
- Approve - Step 10**
PENDING FOR LESS THAN AN HOUR.
Approver (1 of 1 required)
Supriya Ashtikar
- External Signature - Step 10
External Signatory (1 of 1 required)
Supriya Ashtikar
- Internal Signature - Step 10
Internal Signatory (1 of 1 required)
Supriya Ashtikar

Multiple Approvers

- The status of the agreement displays the list of approvers (pending approvers)

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal, Finance User

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Summary

CREATED BY Supriya Ashtikar 1/10/2022

Multiple Approvers are listed in the status Waiting for Approver

1. General Information 2. Vendor Information 3. Contract Term 4. Signatory Information

Progress of the Approvers

The screenshot shows the 'Agreements' interface for the 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)' document. The top navigation bar includes links for SMART LINKS, OPEN IN OFFICE FOR THE WEB, DOWNLOAD ALL, DOWNLOAD, and more. The main content area is divided into sections: 'Team', 'APPROVAL STATUS' (Step 10 pending), 'GENERATE' (Primary Owner: Supriya Ashtikar), 'APPROVE (1 OF 3 STEPS COMPLETED)', and 'CHECK & SIGN'. A callout box highlights the 'APPROVE' section, stating 'The status is indicated as Approved once completed.' Another callout box highlights the 'Team' section, stating 'The agreement's Team indicates that the agreement is Waiting for the approver.'

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal, Finance User

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Team

APPROVAL STATUS Step 10 pending

GENERATE

Primary Owner Supriya Ashtikar

The agreement's Team indicates that the agreement is Waiting for the approver.

APPROVE (1 OF 3 STEPS COMPLETED)

Step 5 Approved

Step 10 Waiting

APPROVER 1 of 1 required

Finance User

Sheetal Sankpal

CHECK & SIGN

EXTERNAL SIGNATURE Step 10 Not Started

INTERNAL SIGNATURE Step 10 Not Started

Parallel versus Sequential Approvals

- Approval process can be:

Parallel

- All approvers are notified at the same time
- All approvers are on the same step number

Sequential

- Only the first approver in the list is notified
- Other approvers are notified only after the first approver approves the agreement

- Parallel or Sequential approvals is controlled using **Step Numbers**
- If the agreement is rejected, it goes back to the **Draft** status

Approval Process

When approvers have the same step numbers, ICI follows a parallel approval process

When approvers have different step numbers, ICI follows a sequential approval path

The screenshot shows the Icertis platform interface for managing agreements. At the top, a navigation bar indicates the current view: 'Agreements / MSA_Supriya_Acme (ICMMasters)'. Below this, a green header bar shows the status 'Waiting For Approval from Sheetal Sankpal, Finance User'. The main content area is divided into several sections:

- Team:** Shows 'Step 10 pending'.
- APPROVAL STATUS:** Shows 'Step 10 pending'.
- GENERATE:** Shows 'Primary Owner: Supriya Ashtikar'.
- APPROVE (1 OF 3 STEPS COMPLETED):** This section is highlighted by a purple callout box. It contains two circles labeled 'Step 5' and 'Step 10'. To the right, there are status indicators: 'Approved' (green checkmark) for Step 5 and 'Waiting' (orange exclamation mark) for Step 10. Below these are sections for 'APPROVER' (1 of 1 required) and 'APPROVING' (1 of 1 required), both listing 'Finance User' and 'Sheetal Sankpal'.
- Parallel:** A bracket on the right side of the approve section groups the 'Step 5' and 'Step 10' circles, indicating they are part of a parallel process.
- CHECK & SIGN:** This section includes 'EXTERNAL SIGNATURE' (Step 10, Not Started) and 'INTERNAL SIGNATURE' (Step 10, Not Started).
- Buttons:** A toolbar at the bottom right includes 'REASSIGN', 'ENABLE', 'DISABLE', 'REMOVE', and other management options.

Parallel Approvers

The screenshot shows the Certis platform interface for managing agreements. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk Actions. Below the navigation bar, the current page is 'Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A status message indicates 'Waiting For Approval from Sheetal Sankpal, Finance User'. On the right side of the screen, there is a vertical toolbar with several action buttons. A red box highlights the 'Delegate' button under the 'Edit' section. Another red box highlights the 'Approve', 'Reject', and 'Request Review' buttons under the 'Edit' section. The rest of the buttons in the toolbar are also highlighted with a red border.

The approver is notified via an email about the approval task. At this point, the approver has access to various action buttons.

- Make changes to the agreement
- **Delegate** the approval task to another user
- **Approve** or **Reject** the agreement
- Request another user to review the agreement before approvals
- Lock the agreement for managing inconsistency when parallel approvers
- Open In Office For The Web

Managing inconsistency when parallel approvers

The screenshot shows the Icertis platform interface for managing agreements. At the top, there is a navigation bar with icons for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk Actions. Below the navigation bar, the URL shows 'Agreements / MSA_Supriya_Acme (/ICMMasterServicesAgreement_10)'. A status message 'Waiting For Approval from Sheetal Sankpal, Finance User' is displayed, with a red box highlighting it. Another red box highlights the 'Locked By : Finance User' message. On the right side of the screen, there are several buttons: UNLOCK (highlighted with a red box), SMART LINKS, OPEN IN OFFICE FOR THE WEB, DOWNLOAD ALL, and three more buttons represented by ellipses and icons. A large purple callout box on the left states: 'The approver can lock the agreement when modifying / editing it.' A similar purple callout box on the right states: 'The approver can unlock the agreement after the modifications are done.'

Home Agreements Requests Associations Compliances Templates Clauses Configure Reports AI Studio Bulk Actions

Agreements / MSA_Supriya_Acme (/ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal, Finance User

Locked By : Finance User

UNLOCK SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL ...

The approver can lock the agreement when modifying / editing it.

The approver can unlock the agreement after the modifications are done.

CREATED ON
1/10/2022

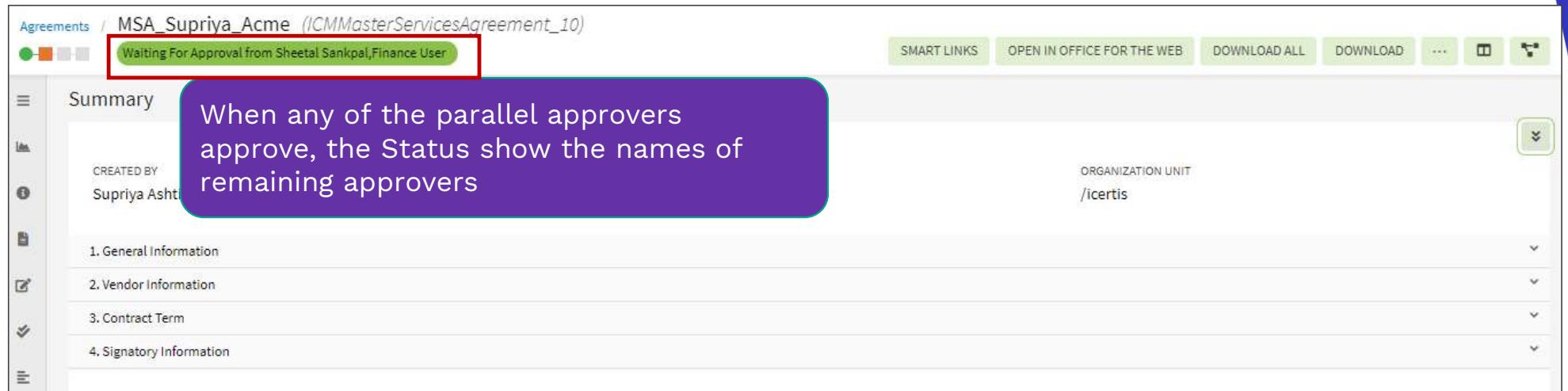
Managing inconsistency when parallel approvers

The screenshot shows a web-based application interface for managing agreements. At the top, there's a header bar with the text "Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". Below the header, there are several status indicators: a green circle with a checkmark, an orange square with a minus sign, a grey square with a plus sign, and a green button labeled "Waiting For Approval from Sheetal Sankpal, Finance User". To the right of these are "DOWNLOAD" and "PRINT" buttons, with the "DOWNLOAD" button highlighted by a red box.

A red box also highlights the "Locked By : Finance User" status message. The main content area is titled "Summary" and contains sections for "CREATED BY" (Supriya Ashtikar) and "CREATED ON" (1/10/2022). Below this, there are four expandable sections: "1. General Information", "2. Vendor Information", "3. Contract Term", and "4. Signatory Information".

A large purple callout bubble is positioned on the right side of the screen, containing the text: "The other stakeholders can't edit or modify the agreement when the agreement is Locked unless its unlocked or approved/rejected".

Parallel Approvers



Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal, Finance User

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Summary

CREATED BY Supriya Ashtekar

ORGANIZATION UNIT /icertis

When any of the parallel approvers approve, the Status show the names of remaining approvers

1. General Information

2. Vendor Information

3. Contract Term

4. Signatory Information

Parallel Approvers

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal

SMART LINKS OPEN IN OFFICE FOR THE WEB DOWNLOAD ALL DOWNLOAD ...

Team

All Approvers Signatories Core Extended ADD NEW MEMBER REASSIGN ENABLE DISABLE REMOVE CLEAR GRID FILTERS

Refine Search Here...

USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATUS
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1		
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10		✓
Sheetal Sankpal	No	sheetal.sankpal@icertis.com	Approver	Step 10	Pending for 1 hour(s).	!
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property	✓
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		

The Team indicates which approvers have completed and which are pending to approve

Delegation of Approvers

The screenshot shows the Icertis platform interface for managing agreements. At the top, there is a navigation bar with various icons and links: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, Bulk Actions, and Admin. Below the navigation bar, the current page is identified as 'Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A status message 'Waiting For Approval from Sheetal Sankpal' is displayed. On the right side, there is a vertical toolbar with options like SMART LINKS, LOCK, OPEN IN OFFICE FOR THE WEB, DOWNLOAD ALL, and a more button. A large callout box highlights the 'Delegate' option in the toolbar, which is also highlighted with a red border. The main content area shows a table titled 'Team' with columns for USER NAME, EMAIL ID, TEAM ROLE, and STEP NUMBER. The table lists six users: Supriya Ashtikar (Primary Owner, Step 1), Finance User (Approver, Step 10), Sheetal Sankpal (Approver, Step 10), Supriya Ashtikar (Deviation Approver, Step 5, Intellectual Property), Supriya Ashtikar (External Signatory, Step 10), and Finance Manager (Internal Signatory, Step 10). A search bar labeled 'Refine Search Here...' is located above the table. At the bottom, there are buttons for 'Items Per Page' (set to 8) and navigation arrows. To the right of the table, a sidebar provides additional actions: Download, Compare Documents, Broadcast, Agreement Deviation Report, Compare Clause Changes, Upload Document, Edit, Approve, Reject, Request Review, and Copy Record.

The approver can delegate the agreement to any other user

USER NAME	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION
Supriya Ashtikar	supriya.ashtikar@icertis.com	Primary Owner	Step 1	
Finance User	financeuser007@icertis.com	Approver	Step 10	
Sheetal Sankpal	sheetal.sankpal@icertis.com	Approver	Step 10	
Supriya Ashtikar	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property
Supriya Ashtikar	supriya.ashtikar@icertis.com	External Signatory	Step 10	
Finance Manager	financemanager@icertis.com	Internal Signatory	Step 10	

Delegation of Approvers

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Waiting For Approval from Sheetal Sankpal, Finance Manager

SMART LINKS RECALL DELEGATION LOCK OPEN IN OFFICE FOR THE WEB ...

Team

All Approvers Signatories Core

Refine Search Here...

Any of the Approver can now perform the approval actions

USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATUS
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1		
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10		✓
Sheetal Sankpal	No	sheetal.sankpal@icertis.com	Approver	Step 10	Delegated To: Finance Manager	Pending for 1 hour(s).
Finance Manager	No	financemanager@icertis.com	Approver	Step 10	Delegated From: Sheetal Sankpal.	Pending for less than an hour.
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property	✓
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		

Delegation of Approvers

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Waiting For Approval from Sheetal Sankpal, Finance Manager

SMART LINKS RECALL DELEGATION LOCK OPEN IN OFFICE FOR THE WEB ...

To cancel the delegation , Recall Delegation can be used

Team

All Approvers Signatories Core Extended

ADD NEW MEMBER REASSIGN ENABLE DISABLE REMOVE CLEAR GRID FILTERS

Refine Search Here...

USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATUS
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 10	Delegated To: Finance Manager	Pending for 1 hour(s).
Finance User	Yes	financeuser007@icertis.com	Approver	Step 10	Delegated From: Sheetal Sankpal	Pending for less than an hour.
Sheetal Sankpal	No	sheetal.sankpal@icertis.com	Approver	Step 10		
Finance Manager	No	financemanager@icertis.com	Approver	Step 10		
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	Deviation Approver	Step 5	Intellectual Property	✓
Supriya Ashtikar	Yes	supriya.ashtikar@icertis.com	External Signatory	Step 10		

The Team captures the delegation information

Approval completion progress

- The Progress view shows the Approve block as green once all the approvers approve

The screenshot shows the 'Agreements' interface for the 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)' document. The top navigation bar includes 'Agreements', the document title, and status indicators ('Approved'). Below the title, there are buttons for 'SMART LINKS', 'LOCK', 'OPEN IN OFFICE FOR THE WEB', 'DOWNLOAD ALL', and a more options menu. On the left, a sidebar titled 'Team' shows 'APPROVAL STATUS' as 'All Approved'. It lists the 'Primary Owner' as 'Supriya Ashtikar'. The main content area is divided into two sections: 'GENERATE' and 'APPROVE (3 OF 3 STEPS COMPLETED)'. The 'APPROVE' section contains two steps: 'Step 5' and 'Step 10', both marked as 'Approved'. To the right is a 'CHECK & SIGN' section with 'EXTERNAL SIGNATURE' and 'INTERNAL SIGNATURE' fields, both set to 'Not Started'. A red box highlights the 'APPROVE' section, and another red box highlights the 'More Options' button in the top right corner of the main content area.

Approved Contract

The screenshot shows the Icertis contract management interface for a specific agreement named "MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". The top navigation bar includes "Agreements", a breadcrumb trail, and a green "Approved" button highlighted with a red box. Below the header are standard navigation links like "Menu", "Dashboard", "Summary", "Details", "Versions" (which is selected and highlighted in green), "History", "Associations", "All Associations", and "Communications". On the right side, there are buttons for "SMART LINKS", "LOCK", "OPEN IN OFFICE FOR THE WEB", "DOWNLOAD ALL", and more. A "CLEAR GRID FILTERS" button is also present.

A callout bubble points to the "Approved" button with the text: "Approved status shows that all the approvals are completed."

The main content area displays a table of version history:

VERSION	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
4	Service User		service@waadicm.onmi...	2/3/2022 1:08:11 PM	This version was system-generated.	
3	Supriya Ashtikar	Primary Owner, Int...	supriya.ashtikar@icertis...	2/2/2022 5:05:58 PM		
2						
1						

A second callout bubble points to the fourth row with the number "4" circled in red, stating: "A new version is updated in the system as the **Approved** version. The latest version becomes the **Approved** version."

At the bottom of the screen, there are pagination controls showing "1 to 4 of 4 items" and a page number "1".

The next step is to send the contract for signatures.
The contract is sent for signatures when the contract creator clicks the button **Send for Internal Signature** (depending on the signature sequence).

Approved Status- Chevron View

The screenshot shows the iCertis platform interface for an 'Agreements' view. A specific agreement, 'MSA_Training (ICMMasterServicesAgreement_15)', is selected and displayed. The status bar at the top indicates the agreement is 'Approved'. A callout bubble labeled 'Chevron View' points to the status indicators on the left.

Workflow Status

- Agreement Created
2/2/2022 9:41:29 AM
Primary Owner
Supriya Ashtikar
- Agreement Published
2/2/2022 9:41:46 AM
Primary Owner
Supriya Ashtikar
- Approve - Step 10
2/3/2022 4:13:35 PM
Approver (1 of 1 required)
Supriya Ashtikar
- External Signature - Step 10
External Signatory (1 of 1 required)
Supriya Ashtikar
- Internal Signature - Step 10
Internal Signatory (1 of 1 required)
Supriya Ashtikar

Agreements / MSA_Training (ICMMasterServicesAgreement_15)

Chevron View

CREATED ON
2/2/2022

ORGANIZATION UNIT
/icertis

Supriya Ashtikar

1. General Information

AGREEMENT CODE
ICMMasterServicesAgreement_15

CONTRACT NAME
MSA_Training

2. Vendor Information

VENDOR NAME
Acme Corporation

3. Contract Term

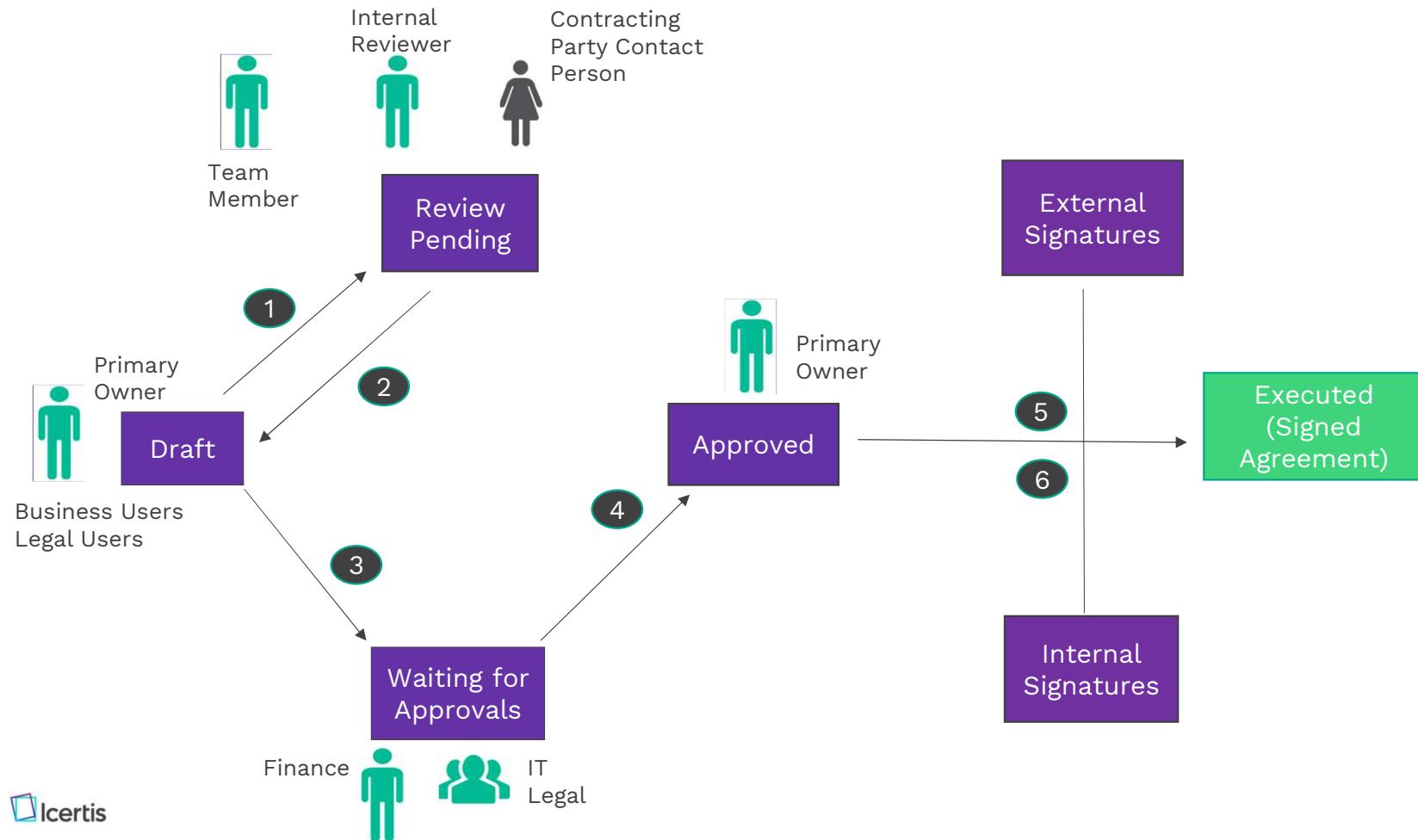
EXPIRY DATE
8/21/2022

EFFECTIVE DATE
2/21/2022

VIEW TEAM

3. Signatures

Agreement Workflow Steps



Signatures

- To execute a contract, both the internal and external party need to sign the contract
- Four types of signatures are supported by ICI:



Manual
Signature



Electronic
Signature



Click to Sign



Hybrid
Signature

Approved Contract

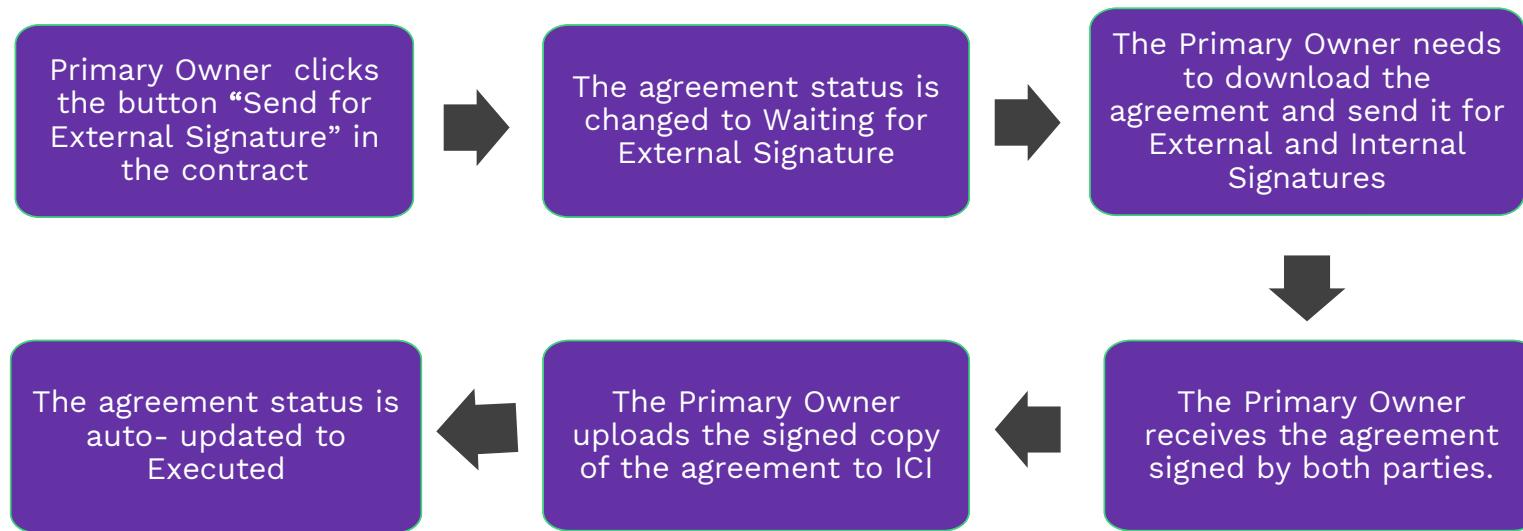
The screenshot shows a web-based contract management system. At the top, a navigation bar includes a back arrow, a search bar with placeholder text 'Search Agreements', and a user profile icon. Below the navigation is a breadcrumb trail: 'Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A status indicator shows the document is 'Approved'.

The main content area displays the 'Summary' of the contract. It includes details such as 'CREATED BY' (Supriya Ashtikar), 'CREATED ON' (1/10/2022), and 'ORGANIZATION UNIT' (/icertis). To the left, a sidebar lists sections: '1. General Information', '2. Vendor Information', '3. Contract Term', and '4. Signatory Information'. On the right, a vertical toolbar provides various actions: Download, Confidential, Compare Documents, Broadcast, Agreement Deviation Report, Compare Clause Changes, Upload Document, Edit, Send For External Signature (which is highlighted with a red border), Delete, On Hold, Cancel, and Copy Record.

A large callout bubble in the center of the summary section contains the text: 'Click the button **Send for External Signatures** to begin the process'.

Sending Agreements for Signature – Manual Process

- Manual Signature Process:



Sending Agreements for Signature – Manual Process

The screenshot shows the iCertis platform interface for managing agreements. At the top, there is a navigation bar with various icons and links. Below it, a main menu bar has several green buttons labeled: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, AI Studio, and Bulk. The 'Agreements' button is highlighted. The main content area displays a specific agreement titled 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A status message 'Waiting For External Signature from Supriya Ashtikar' is shown, with a red box around it. To the right, a 'Downloads' panel is open, showing options to 'Open' or 'Save as PDF'. An arrow points to the 'DOWNLOAD ALL' button, which is also highlighted with a red box. A large callout bubble in the bottom right corner contains the following text:

The Primary Owner needs to Download the agreement and send it to both parties for manual signatures.

A PDF copy of the agreement gets downloaded.

Sending Agreements for Signature – Manual Process

The screenshot shows a user interface for managing agreements. At the top, a navigation bar includes 'Agreements' and the specific document path 'MSA_Supriya_Acme (ICMMasterServicesAgreement_10)'. A green progress bar indicates the status 'Waiting For External Signature from Supriya Ashtikar'. Below the bar, there are several buttons: SMART LINKS, DOWNLOAD ALL, DOWNLOAD, DELEGATE, CONFIDENTIAL, and more. On the right side, a vertical menu lists various actions: Compare Documents, Broadcast, Agreement Deviation Report, Compare Clause Changes, **Upload Signed Copy** (which is highlighted with a red border), Skip Upload And Execute, Reject, Recall, On Hold, Cancel, and Copy Record.

The main content area displays a summary of the contract. It shows the 'CREATED BY' field with 'Supriya Ashtikar' and a list of sections: 1. General Information, 2. Vendor Information, 3. Contract Term, and 4. Signatory Information. Two large callout boxes provide instructions:

- The contract displays a status Waiting for External Signature based on the Signature sequence**
- The Primary Owner receives the signed agreement document from both parties.
This document needs to be uploaded to the system using Upload Signed Copy.**

Sending Agreements for Signature – Manual Process

The Primary Owner can also Skip Upload and Execute
This allows the status of the agreement to be executed and the primary owner can upload the document later

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)
Waiting For External Signature from Supriya Ashtikar

SMART LINKS DOWNLOAD ALL DOWNLOAD DELEGATE CONFIDENTIAL ...

Compare Documents
Broadcast
Agreement Deviation Report
Compare Clause Changes
Upload Signed Copy
Skip Upload And Execute
Reject
Recall
On Hold
Cancel
Copy Record

Please Confirm



The agreement record will move to the Executed state. The signed document upload is pending and can be done at a later stage. Do you want to proceed?

YES

NO

The confirmation message appears to proceed

Sending Agreements for Signature – Manual Process

The Status is changed to 'Executed' (Pending Signed Document)

The Primary owner can upload the fully signed copy later

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Executed (Pending Signed Document)

UPLOAD FULLY SIGNED COPY

EDIT COPY RECORD

Summary

CREATED BY
Supriya Ashtikar

1. General Information

2. Vendor Information

3. Contract Term

4. Signatory Information

Sending Agreements for Signature – Manual Process

The screenshot shows a web-based contract management system. At the top left, it says "Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)". To the right of the title are several green buttons labeled "SMART LINKS", "LOCK", "DOWNLOAD ALL", "DOWNLOAD", "CONFIDENTIAL", "...", and a trash icon. On the far left is a vertical sidebar with a "Menu" icon, followed by "Dashboard" (selected), "Summary" (highlighted in light green), "Details", "Versions", "History", and "Associations". Above the sidebar, there are four colored dots: green, blue, yellow, and orange. Next to the dots is a green button labeled "Executed", which is highlighted with a red rectangular box. In the center of the screen, a purple callout box contains the text: "Once the signed contract is uploaded to the system, the contract displays a status Executed." Below this callout, the main content area shows a table with four rows: "1. General Information", "2. Vendor Information", "3. Contract Term", and "4. Signatory Information". To the right of the table, under "ORGANIZATION UNIT", it says "/icertis".

Sending Agreements for Signature – Manual Process

Agreements / MSA_Supriya_Acme (ICMMasterServicesAgreement_10)

Executed

Versions

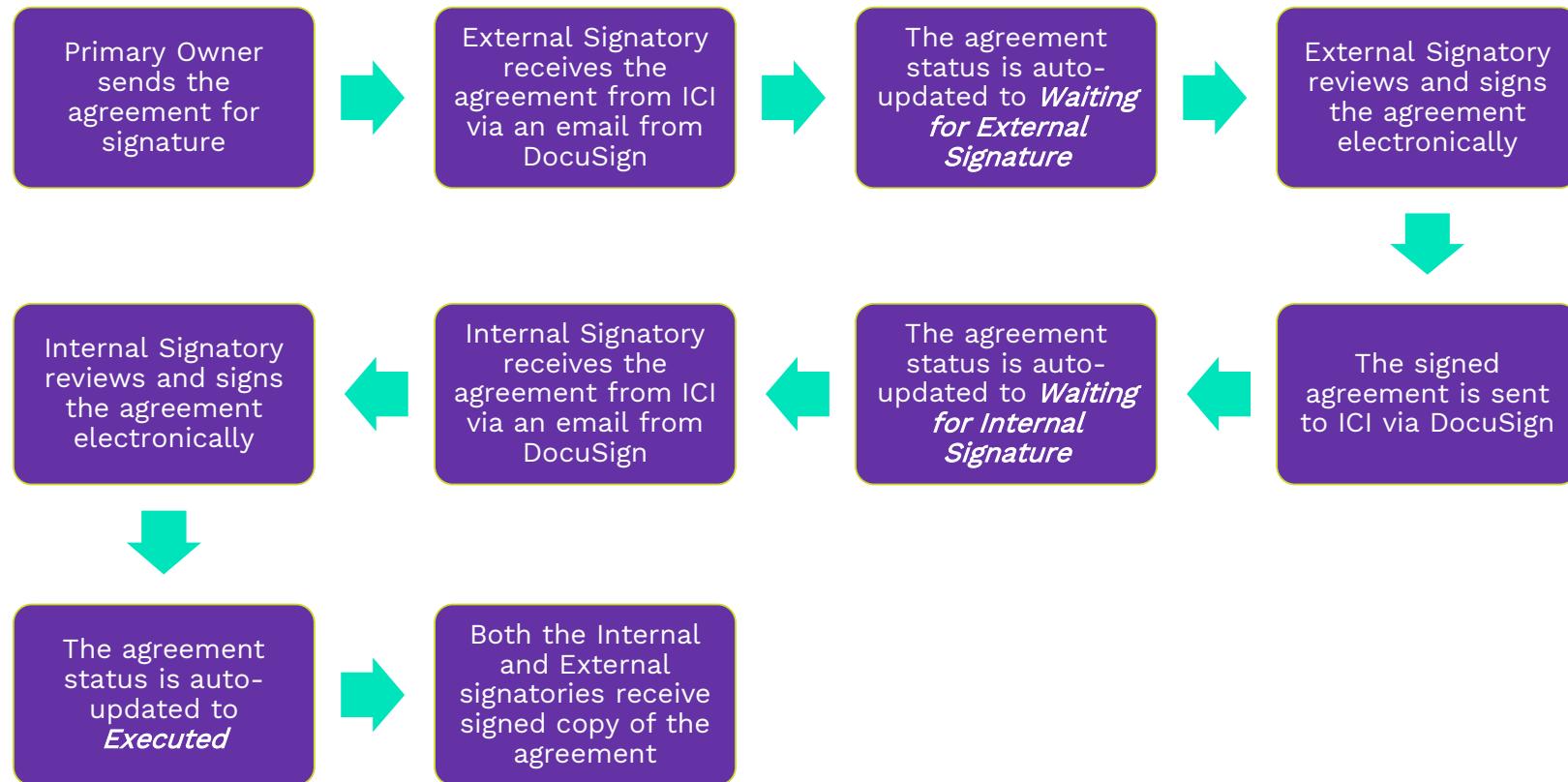
Signed Copy version is generated by the system

VERS...	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
8	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	2/3/2022 5:19:39 PM	signed copy uploaded	
7	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	2/3/2022 4:56:42 PM		
6	Service User		service@waadicm.onmi...	2/3/2022 4:52:57 PM	This version was system-generated.	
5	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	2/3/2022 4:30:44 PM		
4	Service User		service@waadicm.onmi...	2/3/2022 1:08:11 PM	This version was system-generated.	
3	Supriya Ashtikar	Primary Owner, Int...	supriya.ashtikar@icertis...	2/2/2022 5:05:58 PM		
2	Supriya Ashtikar	Primary Owner, Int...	supriya.ashtikar@icertis...	2/1/2022 3:16:43 PM	Changes approved.	

CLEAR GRID FILTERS  

Sending Agreements for Signature – Electronic Process

- Electronic Signature Process:



Sending Agreements for Signature – Click to Sign

- An additional option Click to Sign* is provided to allow signatories to accept the terms of the agreement by using a digital prompt

Attributes (Step 1 of 3)

SIGNATURE TYPE <small>②</small>	<input type="text" value="Electronic Signature"/> <small>x</small> <small>▼</small> Electronic Signature
SIGNATURE SEQUENCE <small>②</small>	Manual Signature Hybrid Signature Click to Sign
EXTERNAL SIGNATORY <small>②</small>	Director
INTERNAL SIGNATORY	Finance User; 
INTERNAL SIGNATORY DESIGNATION	Director

The authorized signatory will see the action button “Click to Sign” using which the signature/acceptance process is initiated.



- 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

Sending Agreements for Signature – Click to Sign

Agreement Acceptance

To see full document [click here](#)

The authorized signatory will accept the terms and conditions of the agreement by selecting “I Accept”.

GENERAL SERVICES AGREEMENT

This General Services Agreement (this “Agreement”) is made effective as of [REDACTED] (“Effective Date”).

BETWEEN:

Icertis Inc., India (“Company”)

AND:

[REDACTED] (the “Supplier”)

1. Services and Deliverables

1.1 Company hereby retains the Supplier to provide to Company services (the “Services”) and to [REDACTED] the goods and/or services (the “Deliverables”) described in the Statement of Work. If Statement

I have read the full document and agree to all the terms and conditions.

I ACCEPT

Waiting for Signatures- Chevron View

icertis Advanced

Home Agreements Requests Associations Compliances Templates Clauses Configure Reports AI Studio Bulk Actions Admin

Agreements / MSA_Training (ICMMasterServicesAgreement_15) Waiting For External Signature from Supriya Ashtikar SMART LINKS DOWNLOAD C

Summary

CREATED BY: Supriya Ashtikar CREATED ON: 2/2/2022 ORGANIZATION UNIT: /icertis

1. General Information

AGREEMENT CODE: ICMMasterServicesAgreement_15 CONTRACT NAME: MSA_Training

2. Vendor Information

VENDOR NAME: Acme Corporation

3. Contract Term

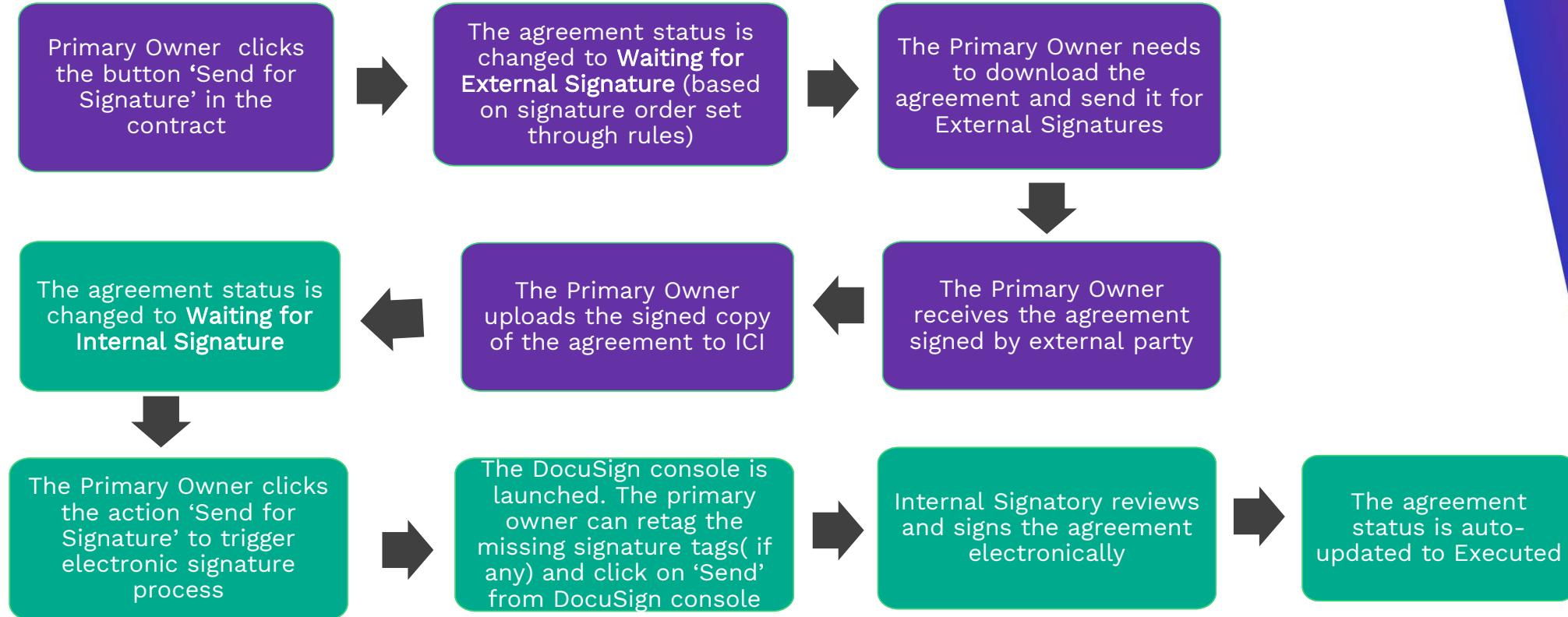
EXPIRY DATE: 8/21/2022 EFFECTIVE DATE: 2/21/2022

VIEW TEAM

Workflow Status

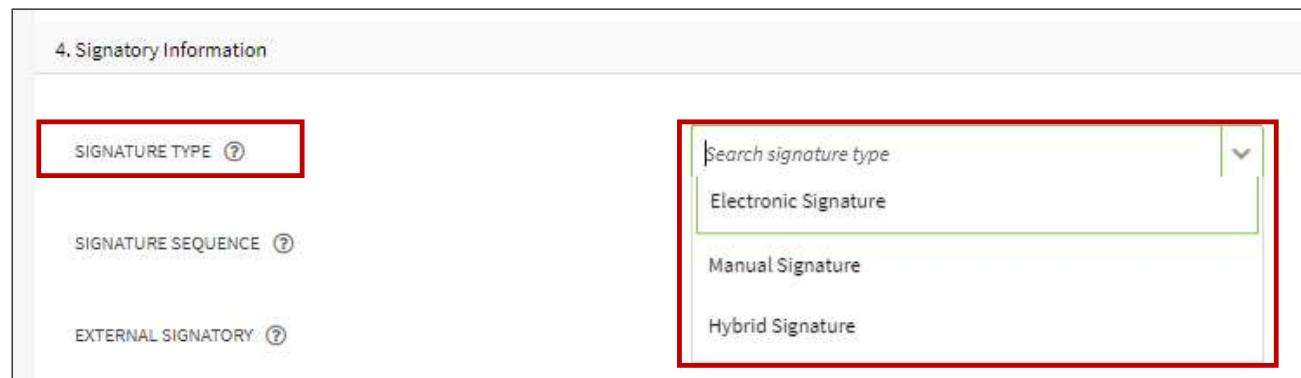
- Agreement Created 2/2/2022 9:41:29 AM Primary Owner Supriya Ashtikar
- Agreement Published 2/2/2022 9:41:46 AM Primary Owner Supriya Ashtikar
- Approve - Step 10 2/3/2022 4:13:35 PM Approver (1 of 1 required) Supriya Ashtikar
- External Signature - Step 10 PENDING FOR LESS THAN AN HOUR. External Signatory (1 of 1 required) Supriya Ashtikar
- Internal Signature - Step 10 Internal Signatory (1 of 1 required) Supriya Ashtikar

Sending the agreement for Signatures – Hybrid Process



Hybrid Signature

- A new Signature type is introduced as Hybrid Signature
- Using this some signatories can be added as a manual signer and some can be added, electronic signer



Mixed Sequence

- Signature Sequence will provide a new option in the Signature Sequence as “Mixed Signature”.
- This new option will allow the owner to send the signature to signatories in any order.
- This means External and Internal signatories can sign an agreement in sequence as defined by the step order instead of External First or Internal First



- When Signature Type is Hybrid, it will always be Mixed Signatory mode and the system will not respect external or internal first rules

DocuSign Console

- It allows to tag /retag the Signature tags
- During third-party papers, the signature tags are not present, and the party doesn't have pre-defined places for signatures
- Thus, DocuSign console allows to tag the Signature tags before the signatories sign the agreement
- Also, during Hybrid Signatures, if the manual signatories sign first, the signature tags are lost
- Thus, Signature tags needs to be retagged if the second party is going to sign electronically
- DocuSign Console allows additional tags such as 'initials' and drag and drop functionality of tags
- It allows to see the preview of Agreement Document before sending it for Signatures

Hybrid Signature Process

- The Primary owner will get an action to ‘Send for Signature’
- The Signature Type will be considered as ‘Mixed’ by default

The screenshot shows the 'Agreements' module interface. At the top, it displays 'Agreements / MSA_Supriya (ICMMasterServicesAgreement_8)' with a status of 'Approved'. Below this is a table titled '4. Signatory Information' containing the following data:

SIGNATURE TYPE	Hybrid Signature
SIGNATURE SEQUENCE	Mixed Signature
DOCUSIGN SIGNATURE CONSOLE	Yes
EXTERNAL SIGNATORY	Finance User
EXTERNAL SIGNATORY DESIGNATION	Manager
EXTERNAL SIGNATURE TYPE	Manual
INTERNAL SIGNATORY	Supriya Ashtikar
INTERNAL SIGNATORY DESIGNATION	Director
INTERNAL SIGNATURE TYPE	Electronic
AG STORAGE LOCATION	ST1221
ESIGNATURE PROVIDER	DocuSign

A red box highlights the 'SIGNATURE TYPE' row. To the right, a callout box states: 'The Primary owner can initiate the signature process using ‘Send for Signature’ action'.

A context menu is open on the right side of the screen, listing various actions: Confidential, Compare Documents, Broadcast, Agreement Deviation Report, Compare Clause Changes, Upload Document, Edit, **Send For Signature** (which is highlighted with a red box), Delete, On Hold, Cancel, and Copy Record.

Below the main table, another callout box states: 'Based on the Signature Type selected for individual signatory the Signature process will be initiated'.

Hybrid Signature Process – Manual signature

The screenshot shows the 'Agreements' module interface. The top navigation bar includes 'Agreements', 'MSA_Supriya (ICMMasterServicesAgreement_8)', and a status message 'Waiting For Signature from Finance User (External Signatory)'. The top right features several buttons: SMART LINKS, DOWNLOAD (which is highlighted with a red box), DELEGATE, COMPARE DOCUMENTS, BROADCAST, and more. On the left, a vertical sidebar menu lists: Menu, Dashboard, Summary, Details (which is selected and highlighted with an orange box), Versions, History, Associations, All Associations, Communications, Statement of Work, Document List, Deviations, Amendments (which has a checked checkbox), and Commitments. The main content area displays 'Signatory Information' for the document. It includes fields for SIGNATURE TYPE (Hybrid Signature), SIGNATURE SEQUENCE (Mixed Signature), DOCUSIGN SIGNATURE CONSOLE (Yes), EXTERNAL SIGNATORY (Finance User, highlighted with a red box), EXTERNAL SIGNATORY DESIGNATION (Manager), EXTERNAL SIGNATURE TYPE (Manual), INTERNAL SIGNATORY (Supriya Ashtikar), INTERNAL SIGNATORY DESIGNATION (Director), INTERNAL SIGNATURE TYPE (Electronic), AG STORAGE LOCATION (ST1221), and ESIGNATURE PROVIDER (DocuSign). A purple callout box on the right states: 'Signatory User downloads the document to complete the manual signature process'.

4. Signatory information	
SIGNATURE TYPE	Hybrid Signature
SIGNATURE SEQUENCE	Mixed Signature
DOCUSIGN SIGNATURE CONSOLE	Yes
EXTERNAL SIGNATORY	Finance User
EXTERNAL SIGNATORY DESIGNATION	Manager
EXTERNAL SIGNATURE TYPE	Manual
INTERNAL SIGNATORY	Supriya Ashtikar
INTERNAL SIGNATORY DESIGNATION	Director
INTERNAL SIGNATURE TYPE	Electronic
AG STORAGE LOCATION	ST1221
ESIGNATURE PROVIDER	DocuSign

Hybrid Signature Process – Manual signature

Agreements / MSA_Supriya (ICMMasterServicesAgreement_R)

Waiting For Signature from Finance User (External Signatory)

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications

Statement of Work

Document List

Deviations

SMART LINKS DOWNLOAD DELEGATE COMPARE DOCUMENTS BROADCAST ...

Agreement Deviation Report

Compare Clause Changes

Upload Signed Copy

Reject

Copy Record

4. Signatory Information

SIGNATURE TYPE	Hybrid Signature
SIGNATURE SEQUENCE	Mixed Signature
DOCUSIGN SIGNATURE CONSOLE	Yes
EXTERNAL SIGNATORY	Finance User
EXTERNAL SIGNATORY DESIGNATION	Manager
EXTERNAL SIGNATURE TYPE	Manual
INTERNAL SIGNATORY	Supriya Ashtikar
INTERNAL SIGNATORY DESIGNATION	Director
INTERNAL SIGNATURE TYPE	Electronic
AG STORAGE LOCATION	ST1221

Signatory User uploads the document to complete the manual signature process

Once the document is signed by the external user, system sends it to the Internal user for signatory considering the signatory configuration.

Hybrid Signature – Send for Signature to initiate electronic signature

The screenshot shows the Icertis platform interface for managing agreements. On the left, the 'Agreements' section displays a summary for 'MSA_Supriya (ICMMasterServicesAgreement_5)' with a status of 'Approved'. The main area shows 'DocuSign Mail Details' for sending the agreement to signatories. The 'EXTERNAL SIGNATORY' field contains 'Supriya Ashtikar (supriya.ashtikar@icertis.com)'. The 'INTERNAL SIGNATORY' field also contains 'Supriya Ashtikar (supriya.ashtikar@icertis.com)'. The 'CC' field contains 'Supriya Ashtikar'. The 'SUBJECT' field is set to 'DocuSign Subject'. A note in the 'ADDITIONAL INFORMATION' field states: 'Work together and we need your signature to finalize the agreement. Please click the 'Review Document' button. If you are not authorized to sign this agreement and want to reassign the signer, do not just click the 'Other Actions' option and then click on 'Assign to Someone Else' button once you enter the signing information. This is not intended to be and does not constitute a legally binding obligation. No legally binding obligations are inferred until an agreement in final form is executed via the eSignature document using the link provided. If you have any questions or concerns, please direct them to supriya.ashtikar@icertis.com.' At the bottom, a purple callout box highlights the 'SEND' button, which is highlighted with a red border.

DocuSign Console is an intermediate state while sending for the signature to signatories.

When we send an agreement from ICI instead of sending for signature, ICI opens an envelope specific to DocuSign Console.

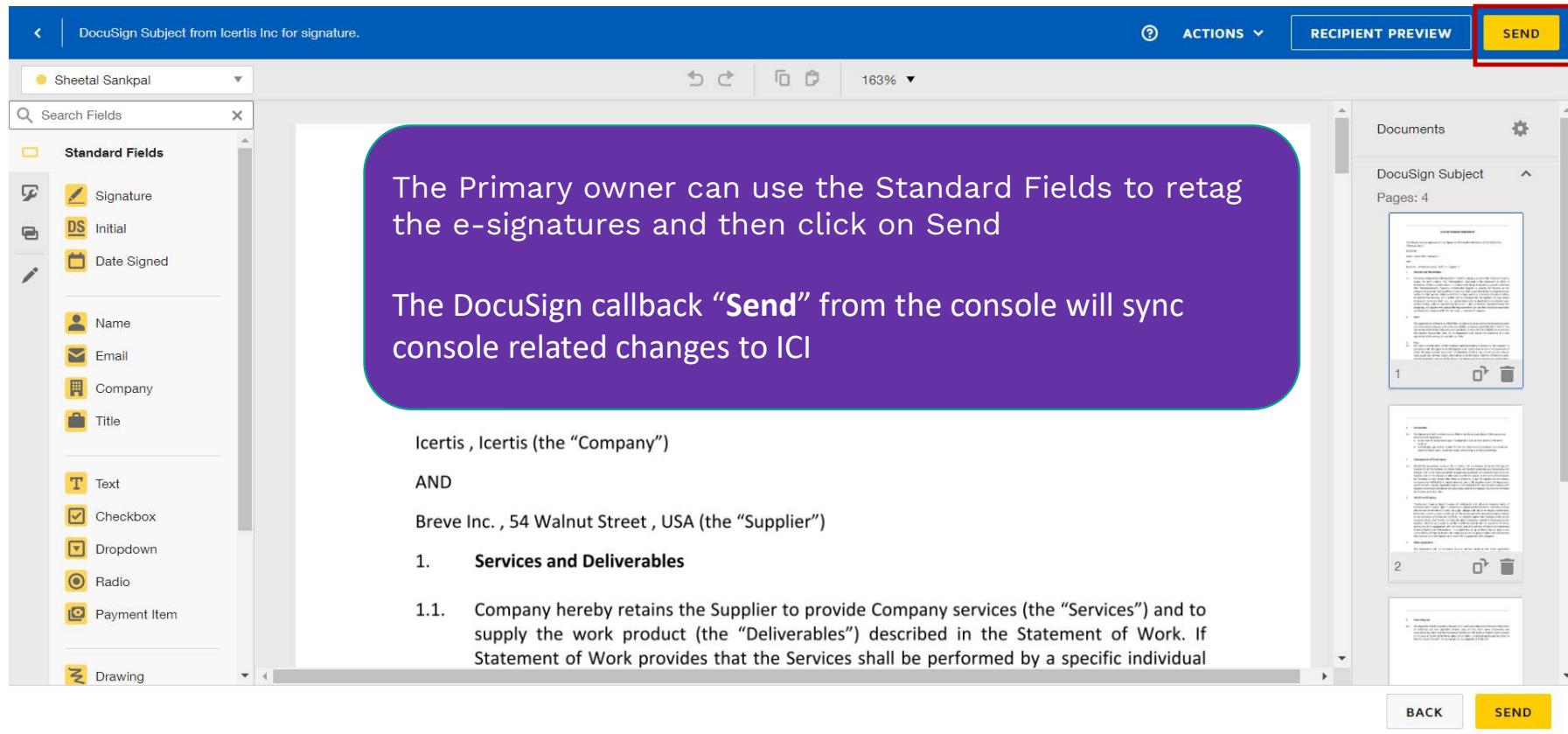
4. Signatory Information

SIGNATURE TYPE: Electronic Signature

EXTERNAL SIGNATOR: Supriya Ashtikar

SEND

Hybrid Signature – DocuSign console



The Primary owner can use the Standard Fields to retag the e-signatures and then click on Send

The DocuSign callback “Send” from the console will sync console related changes to ICI

Icertis , Icertis (the “Company”)
AND
Breve Inc. , 54 Walnut Street , USA (the “Supplier”)

1. **Services and Deliverables**

1.1. Company hereby retains the Supplier to provide Company services (the “Services”) and to supply the work product (the “Deliverables”) described in the Statement of Work. If Statement of Work provides that the Services shall be performed by a specific individual

Hybrid Signature – Waiting for External Signature to Sign Electronically

The screenshot shows the Certis software interface for managing agreements. The main title is "MSA_Training (CMMasterServicesAgreement_8)". A status message "Waiting For External Signature from Supriya Ashtikar" is displayed in a green box at the top. The left sidebar contains a navigation menu with options like "Menu", "Dashboard", "Summary", "Details" (which is selected), "Versions", "History", "Associations", "All Associations", "Communications", and "Statement of Work". The right panel displays various document details:

Field	Value
EXTERNAL SIGNATORY	Supriya Ashtikar
EXTERNAL SIGNATORY DESIGNATION	Manager
INTERNAL SIGNATORY	Supriya Ashtikar
INTERNAL SIGNATORY DESIGNATION	Manager
ESIGNATURE PROVIDER	DocuSign
5. Miscellaneous	
ASSIGNED PARENT ID	--
ASSIGNMENT DATE	--

At the top right, there are buttons for "SMART LINKS", "DOWNLOAD", "COMPARE DOCUMENTS", "BROADCAST", and more. The bottom right corner features the Certis logo.

Hybrid Signature – Both parties' signature complete

The screenshot shows a screenshot of the Icertis platform interface. At the top left, it says "Agreements / MSA_Supriya (ICMMasterServicesAgreement_8)". On the far right, there are several buttons: SMART LINKS, LOCK, DOWNLOAD ALL, DOWNLOAD, CONFIDENTIAL, and three more buttons represented by ellipses (...). Below these buttons, there is a red rectangular box highlighting the "Executed" button, which is green with white text.

The main content area has a sidebar on the left with the following sections:

- Menu (with a dropdown arrow)
- Dashboard
- Summary** (highlighted with a green background)
- Details
- Versions
- History
- Associations
 - All Associations
 - Communications (with a 0 count)
 - Statement of Work (with a 0 count)

The main content area is titled "Summary". It displays the following information:

CREATED BY	CREATED ON	ORGANIZATION UNIT
Supriya Ashtikar	1/7/2022	/icertis

Below this, there is a list of sections:

- 1. General Information
- 2. Vendor Information
- 3. Contract Term
- 4. Signatory Information

Hybrid Signature – Setting DocuSign Console to Off

The screenshot shows the Agreements module interface for an MSA_Supriya document. The left sidebar lists various sections: Menu, Dashboard, Summary, Details (which is selected), Versions, History, Associations, All Associations, Communications (0), Statement of Work (0), Document List, Deviations (0), Amendments (0), and Commitments (0). The main content area displays the following details:

SIGNATURE TYPE	Hybrid Signature
SIGNATURE SEQUENCE	Mixed Signature
DOCUSIGN SIGNATURE CONSOLE	No
EXTERNAL SIGNATORY	Finance User
EXTERNAL SIGNATORY DESIGNATION	Manager
EXTERNAL SIGNATURE TYPE	Manual
INTERNAL SIGNATORY	Supriya Ashtikar
INTERNAL SIGNATORY DESIGNATION	Director
INTERNAL SIGNATURE TYPE	Electronic

A context menu is open on the right side of the screen, listing options such as SMART LINKS, LOCK, OPEN IN OFFICE FOR THE WEB, DOWNLOAD ALL, DOWNLOAD, ... (dropdown), Confidential (dropdown), Compare Documents (dropdown), Broadcast (dropdown), Agreement Deviation Report (dropdown), Compare Clause Changes (dropdown), Upload Document (dropdown), Edit (dropdown), Send For Signature (highlighted with a red box), Delete (dropdown), On Hold (dropdown), Cancel (dropdown), and Copy Record (dropdown).

Hybrid Signature – Setting DocuSign Console to Off

The screenshot shows the iCertis platform interface. On the left, the navigation sidebar includes Home, Agreements, Requests, Associations, Compliances, and Templates. Under Agreements, it shows 'MSA_Supriya (ICMMasterServicesAgreement_17)' with a status of 'Approved'. The main content area displays the 'DocuSign Mail Details' configuration for this agreement. The configuration includes:

- EXTERNAL SIGNATORY:** (Empty field)
- INTERNAL SIGNATORY:** Supriya Ashtikar (supriya.ashtikar@icertis.com)
- CC:** Supriya Ashtikar (highlighted with a green box)
- SUBJECT:** DocuSign Subject
- ADDITIONAL INFORMATION:** (Large text area containing a disclaimer about e-signature and legal binding)
- SIGNATURE TYPE:** (Section)
- SIGNATURE SEQUENCE:** (Section)
- DOCUSIGN SIGNATURE CONSOLE:** (Section)
- EXTERNAL SIGNATORY:** (Section)
- EXTERNAL SIGNATORY DESIGNATION:** (Section)
- EXTERNAL SIGNATURE TYPE:** (Section)
- INTERNAL SIGNATORY:** (Section)
- INTERNAL SIGNATORY DESIGNATION:** (Section)
- INTERNAL SIGNATURE TYPE:** (Section)

A red box highlights the 'SEND' button at the bottom right of the configuration panel.

4. Expiry

Agreements Expiry

The screenshot shows a software interface for managing agreements. At the top, there's a navigation bar with 'Agreements' and a specific document ID '(ICMMasterServicesAgreement_25)'. A status indicator 'Expired' is shown next to a green progress bar. On the right, there are buttons for 'SMART LINKS', 'DOWNLOAD ALL', 'DOWNLOAD', 'COMPARE DOCUMENTS', and other document management options.

The main area is titled 'Summary' and contains the following details:

- CREATED BY: Supriya Ashtikar
- CREATED ON: 2/9/2022
- ORGANIZATION UNIT: /icertis

On the left, a sidebar lists sections: 1. General Information, 2. Vendor Information, 3. Contract Term (which is selected), and 4. Signatory Information. Below the sidebar, an 'EXPIRY DATE' is listed as 2/11/2022.

A large callout box with a purple gradient background is overlaid on the right side of the screen. It contains the following text:

Based on the expiry date set, the agreement status is changed to Expired. The following actions can be performed on expired contracts:

- Reset the expiry date
- Download the agreement document
- Download All – download the agreement and associations
- Add Amendment to revive the original agreement

On the far right, there's a vertical 'Self Help' menu with several icons.

A photograph of a man with short brown hair, a beard, and glasses, wearing a light-colored polo shirt. He is seated at a desk in an office environment, looking down at a computer monitor. The background shows office equipment and other office workers.

Thank You