

Agenda – Part A

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| 04 | Linking Agreements |
| 05 | Agreement Constituents |
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Linking Agreements

Icertis Contract Intelligence
Product Training



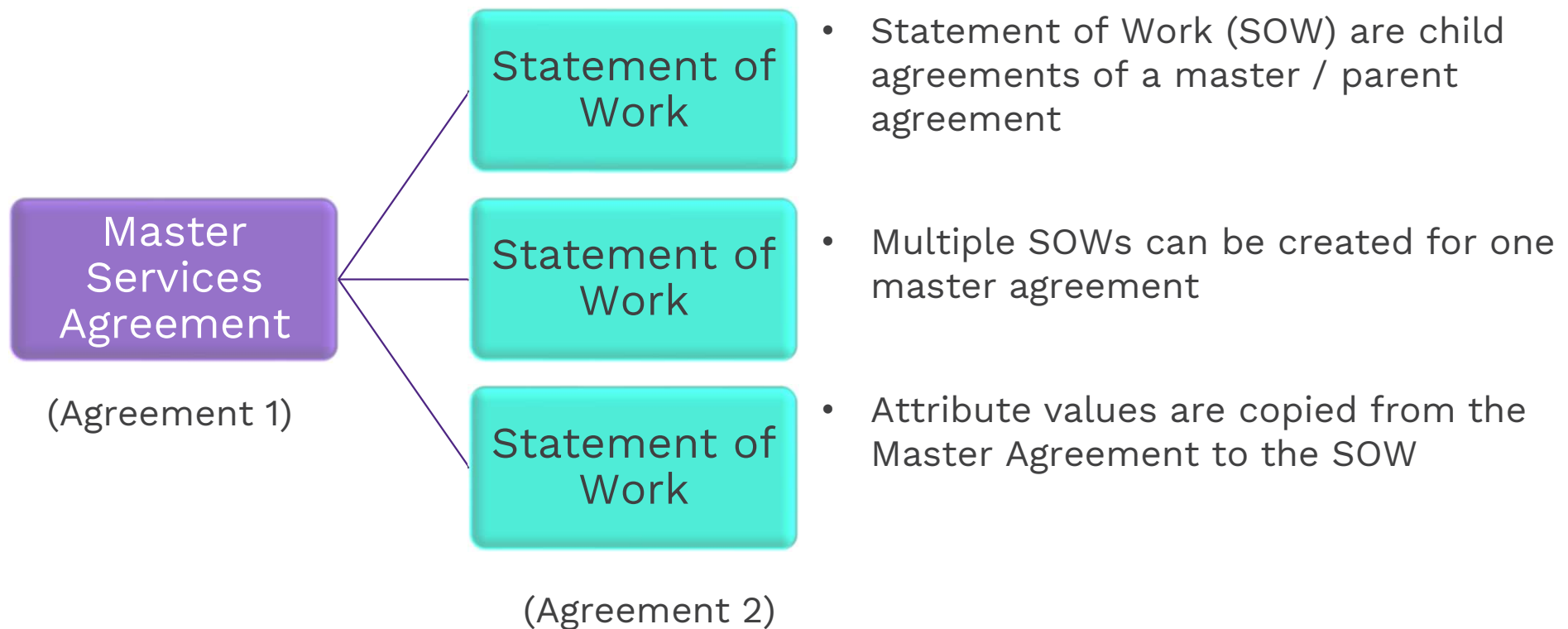
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01	Relating two Agreements
02	First Approach
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1. Relating two Agreements

Relating two Agreements



Different Approaches of Linking Agreements

First Approach

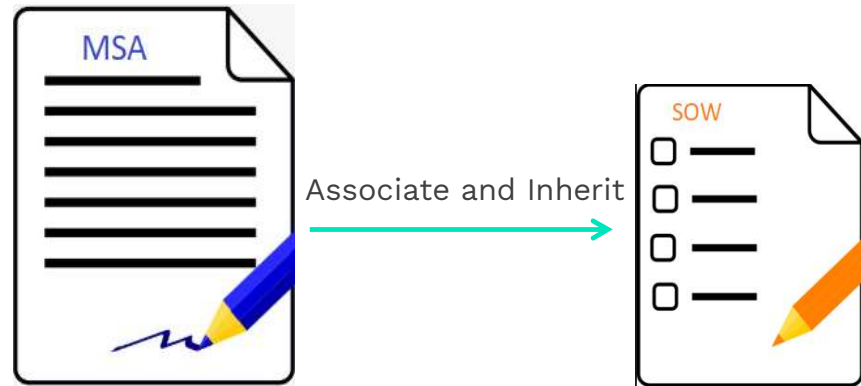
- Create parent agreement using Create Agreement tile
- Create child agreement using the Create Agreement tile
- Link the parent and child agreements

Second Approach

- Create a parent Agreement
- Create child agreements from the parent agreement instance

Linking Agreements - First Approach

- 1) Create the parent agreement MSA
- 2) Create the child agreement SOW
- 3) After creating the SOW, associate the parent agreement with the child



Note:

- Both the agreements are created from the Create Agreement page.
- The MSA and SOW are linked (associated) which allows the flow of metadata (inheritance) from parent to child

Enter Contract Type and Paper Details

- The first step of creating an agreement is to select the **Agreement Type Name** and the **Type of Paper**
- Every Agreement Type contains attributes & templates.
- **Type of Paper** is set to Own by default. Users can change it to Third Party when using the client's paper or uploading an already signed contract

The screenshot shows a web form titled 'Create Agreement' with a subtitle 'Statement of Work'. Below this is a section header 'Contract Type Details (Step 1 of 4)'. A red rectangular box highlights three dropdown menus: 'CATEGORY' set to 'Procurement Contracts', 'CONTRACT TYPE NAME' set to 'Statement of Work', and 'TYPE OF PAPER' set to 'Own'. Below these fields is a large purple button with the text 'Create SOW agreement'. At the bottom of the form is a navigation bar with four buttons: 'PREVIOUS' (disabled), 'NEXT' (active/highlighted in green), 'SAVE' (disabled), and 'DISCARD' (disabled).

Note: MSA Parent is already created.

Associate and Inherit

- For creating the **Statement of Work**, users need to link the **Master Services Agreement** to the SOW.

The screenshot shows the 'Create Agreement' interface for a 'Statement of Work'. The top navigation bar includes links for Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, and Configure. The main section is titled 'Attributes (Step 2 of 4)' and contains a red-bordered box labeled 'ASSOCIATE AND INHERIT'. Inside this box, there is a field for 'Master Services Agreement' with a lookup icon (magnifying glass) to its right. A red circle with the number '1' is placed over the lookup icon. Below this, there is a field for 'ORGANIZATION UNIT' with the value '/icertis' and another lookup icon. The section is titled '1. General Information' and includes a field for 'AGREEMENT CODE' with a help icon.

Click on the Lookup icon next to Master agreement to select the parent agreement .

Note: Linking the MSA with SOW can be done during the SOW creation process OR after creating the SOW

Lookup Parent Agreements

2

Select Master Services Agreement

REFRESHSELECT COLUMNSEXPORT

Refine ViewShowing 1 to 8 of 18 records

Contains

Refine Search here (min 3 char)

CATEGORIES ?

Select Field

CLEAR ALL

	AGREEMENT CODE	CONTRACT NAME	STATUS	CREATED BY	CREATED DATE	
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA Radhika	Waiting For Approval	Icertis Admin	2/4/2022	...
<input checked="" type="radio"/>	ICMMasterServicesAgreeme...	MSA_Supriya	Draft	Supriya Ashtikar	2/4/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA_Supriya	Waiting For External Signat...	Supriya Ashtikar	1/6/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA_Supriya	Executed	Supriya Ashtikar	1/7/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA_Training	Waiting For External Signat...	Supriya Ashtikar	2/2/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA_Supriya_Acme	Executed	Supriya Ashtikar	1/10/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA Dinesh Request	Draft	CLM Admin	2/2/2022	...
<input type="radio"/>	ICMMasterServicesAgreeme...	MSA Colleen	Draft	Icertis Admin	1/28/2022	...

8 Items

SELECTED RECORDSICMMasterServicesAgre... X

SELECTCLEAR

- Use the Lookup Search window to filter and find the relevant Master Services Agreements from the list.
- Select the Master agreement to link the document with the SOW Agreement

Enter the Attributes Values

- The attributes are put into Groups for keeping similar data together.
- Keeping information in organized groups helps the users to quickly find information in a contract
- User needs to provide values for the attributes(metadata).
- In this case, most of the metadata values are inherited from the master.

Create Agreement
Statement of Work

Attributes (Step 2 of 4)

ASSOCIATE AND INHERIT Master Services Agreement

ORGANIZATION UNIT /icertis

1. General Information

2. Vendor Information

3. Terms and Services


4. Signature Type

5. Miscellaneous

BUSINESS STATUS Draft

PREVIOUS NEXT SAVE DISCARD

Enter the Attributes Values

- Besides making an association between agreements, ICI copies most of the metadata values from the MSA agreement to the SOW.
- All attributes with  symbol, inherit field values from the master agreement

Create Agreement
Statement of Work






Attributes (Step 2 of 4)

ASSOCIATE AND INHERIT Master Services Agreement

ORGANIZATION UNIT /icertis

1. General Information

2. Vendor Information

VENDOR NAME	 Search vendor name
VENDOR ADDRESS	 Search vendor address
VENDOR STATE	 Search vendor state
VENDOR CITY	 Search vendor city
VENDOR COUNTRY	 Search vendor country

PREVIOUS NEXT SAVE DISCARD

Enter the Attributes Values

- **Terms and Services-** The Statement of Work agreement has attributes to capture:
 - Effective Date
 - Expiry Date
 - Contract Value
 - Payment Terms
 - Services

The screenshot shows a web form titled 'Attributes (Step 2 of 4)' with a sub-header '3. Terms and Services'. A red note at the top states: 'FOR CONTRACT VALUE GREATER THAN OR EQUAL TO 50K AND THE VENDOR COUNTRY IS INDIA, THEN AN ADDITIONAL ATTRIBUTE COUNTRY HEAD APPEARS ON THE SCREEN'. The form contains the following fields:

- EFFECTIVE DATE** with a calendar icon.
- EXPIRY DATE** with a calendar icon.
- CONTRACT TERM** with a numeric input field and a unit dropdown set to 'IN DAYS'.
- CONTRACT VALUE** with a 'Select Currency' dropdown and a numeric input field.
- PAYMENT TERMS** with a dropdown menu showing 'Search payment terms'.
- DESCRIPTION OF SERVICES** with a large text area.
- SPECIFIC RESOURCES REQUIRED** with a toggle switch set to 'No'.

Auto calculation of metadata

- The Contract Term is auto calculated
- The Currency field gets auto filled based on the User currency preference (if set)
- Specific Resource required adds conditional association *

3. Terms and Services

FOR CONTRACT VALUE GREATER THAN OR EQUAL TO 50K AND THE VENDOR COUNTRY IS INDIA, THEN AN ADDITIONAL ATTRIBUTE COUNTRY HEAD APPEARS ON THE SCREEN

EFFECTIVE DATE ⓘ 2/28/2022 📅

EXPIRY DATE ⓘ 3/31/2022 📅

CONTRACT TERM 31 IN DAYS

CONTRACT VALUE ⓘ USD 5,000.00

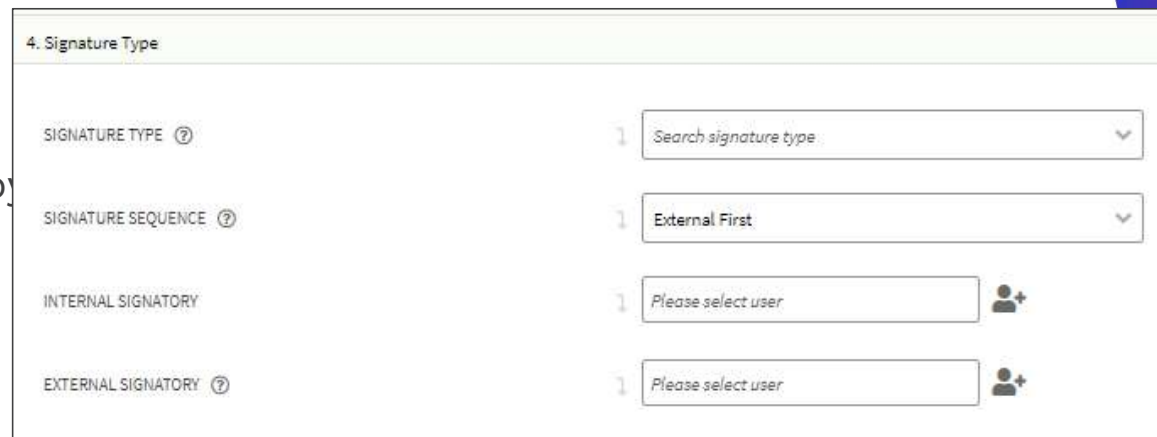
PAYMENT TERMS 45 Days

DESCRIPTION OF SERVICES

SPECIFIC RESOURCES REQUIRED No

Enter the Attributes Values

- **Signature**
 - Contracts can be signed manually or electronically
 - The sequence of signatures whether External First or Internal First is decided by the Signature Sequence field
 - Internal Signatory and External Signatory fields identify the authorized users from either party for signing the contract



The screenshot shows a form titled "4. Signature Type" with four fields, each preceded by a small "1" icon:

- SIGNATURE TYPE** (with a help icon): A dropdown menu with the text "Search signature type" and a downward arrow.
- SIGNATURE SEQUENCE** (with a help icon): A dropdown menu with the text "External First" and a downward arrow.
- INTERNAL SIGNATORY**: A text input field with the placeholder "Please select user" and a user icon with a plus sign.
- EXTERNAL SIGNATORY** (with a help icon): A text input field with the placeholder "Please select user" and a user icon with a plus sign.

Attribute's Conditional Visibility

- Enable Expression
 - Some attributes can be configured to appear based on the values of other attribute. This can be achieved using Visibility Expression configuration for the attribute.

Note: Visibility expression configuration is discussed in detailed in Configuration training

Attributes with Conditional display

Example- Country head attribute is configured to appear based on Contract Value.

Contract Value greater than 50000

Contract Value less than 50000

3. Terms and Services

FOR CONTRACT VALUE GREATER THAN OR EQUAL TO 50K AND THE VENDOR COUNTRY IS INDIA, THEN AN ADDITIONAL ATTRIBUTE COUNTRY HEAD APPEARS ON THE SCREEN

EFFECTIVE DATE ⓘ 1/4/2022 📅

EXPIRY DATE ⓘ 1/31/2022 📅

CONTRACT TERM 27 IN DAYS

CONTRACT VALUE ⓘ USD 60,000.00

PAYMENT TERMS 45 Days

COUNTRY HEAD Please select user 👤

DESCRIPTION OF SERVICES Training

3. Terms and Services

FOR CONTRACT VALUE GREATER THAN OR EQUAL TO 50K AND THE VENDOR COUNTRY IS INDIA, THEN AN ADDITIONAL ATTRIBUTE COUNTRY HEAD APPEARS ON THE SCREEN

EFFECTIVE DATE ⓘ 1/4/2022 📅

EXPIRY DATE ⓘ 1/31/2022 📅

CONTRACT TERM 27 IN DAYS

CONTRACT VALUE ⓘ USD 49,000.00

PAYMENT TERMS 45 Days

DESCRIPTION OF SERVICES Training



Select the Template

- Once the attributes/ metadata values are provided, the system displays the configured templates required for creating the contract.
- On the last step, a summary of all the metadata information is displayed, for review and verification.

Statement of Work / SOW Supriya (ICMStatementofWork_4)

Select Template (Step 2 of 3)

Select system template ?

  CLEAR SELECTION

☒ SOW Template

[Preview Template](#)

PREVIOUS NEXT SAVE DISCARD

Verify Metadata

- On the last step, a summary of all the metadata information is displayed, for review and verification.

Statement of Work / MSA Supriya (ICMStatementofWork_5)

Verify (Step 3 of 3)

AGREEMENT	MSA Supriya
ORGANIZATION UNIT	/icertis

1. General Information

2. Vendor Information

3. Terms and Services

FOR CONTRACT VALUE GREATER THAN OR EQUAL TO 50K AND THE VENDOR COUNTRY IS INDIA, THEN AN ADDITIONAL ATTRIBUTE COUNTRY HEAD APPEARS ON THE SCREEN

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EFFECTIVE DATE	2/28/2022
EXPIRY DATE	3/31/2022
CONTRACT TERM	31 IN DAYS
CONTRACT VALUE	USD 40,000.00

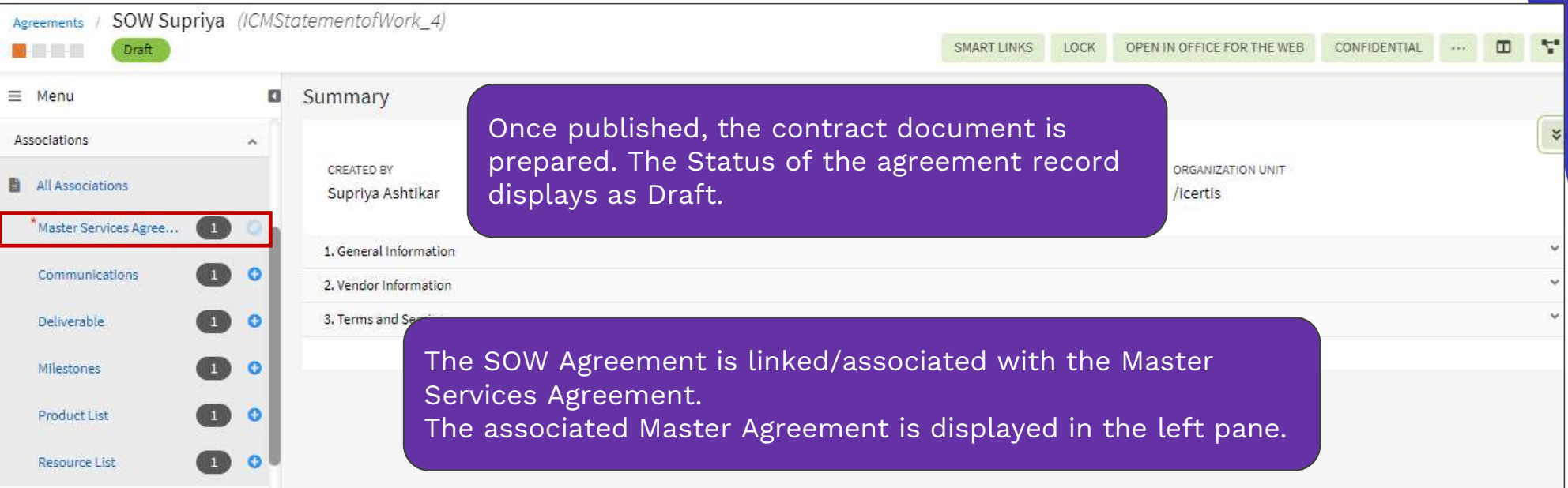
PREVIOUS

NEXT

UPDATE

DISCARD

SOW Document Created with MSA as Association



The screenshot displays the Icertis interface for a Statement of Work (SOW) document titled "SOW Supriya (ICMStatementofWork_4)". The document status is "Draft". The left sidebar shows a list of associations, with "Master Services Agree..." highlighted in red. The main content area shows the "Summary" tab, indicating the document was created by "Supriya Ashtikar" and is associated with the "Organization Unit: /icertis". The summary lists sections: 1. General Information, 2. Vendor Information, and 3. Terms and Services.

Agreements / SOW Supriya (ICMStatementofWork_4)

Draft

SMART LINKS LOCK OPEN IN OFFICE FOR THE WEB CONFIDENTIAL ...

Menu

Associations

All Associations

* Master Services Agree... 1

Communications 1

Deliverable 1

Milestones 1

Product List 1

Resource List 1

Summary

CREATED BY
Supriya Ashtikar

ORGANIZATION UNIT
/icertis

1. General Information

2. Vendor Information

3. Terms and Services

Once published, the contract document is prepared. The Status of the agreement record displays as Draft.

The SOW Agreement is linked/associated with the Master Services Agreement. The associated Master Agreement is displayed in the left pane.

MSA as Association

- The Mater Services Agreement that is linked can be viewed by clicking on it

The screenshot displays the Icertis SOW Supriya (ICMStatementofWork_4) interface. The top navigation bar includes buttons for SMART LINKS, LOCK, OPEN IN OFFICE FOR THE WEB, CONFIDENTIAL, and other actions. The left sidebar shows a menu with 'Associations' and 'All Associations'. The main content area is titled 'Associations / Master Services Agreement' and features a 'Refine View' section with a 'Contains' dropdown and a search bar. A table lists the associations, with the first row highlighted in green and red. The table has columns for ENTITY NAME, CONTRACT NAME, AGREEMENT CO..., CREATED BY, CREATED DATE, and STATUS. The first row shows 'Master Services ...', 'MSA Dinesh', 'ICMMasterService...', 'CLM Admin', '1/3/2022', and 'Waiting For Ext...'. The bottom of the interface shows '8 Items Per Page' and 'Showing 1 to 1 of 1 Master Services Agreement'.

ENTITY NAME	CONTRACT NAME	AGREEMENT CO...	CREATED BY	CREATED DATE	STATUS
Master Services ...	MSA Dinesh	ICMMasterService...	CLM Admin	1/3/2022	Waiting For Ext...

Linking Agreements - Second Approach

- 1) Create the parent agreement MSA
- 2) Create the child agreement SOW from the parent agreement instance
- 3) Both the agreements are already linked (associated) as the SOW is created from the parent instance



Base Agreement and Associated Linked Agreement

Agreements / MSA_Supriya (ICMMasterServicesAgreement_17)

Draft

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

Menu

Details

Versions

History

Associations

All Associations

Communications 0

Statement of Work 1

Details

ORGANIZATION UNIT /icertis

1. General Information

AGREEMENT CODE ICMMasterServicesAgreement_17

CONTRACT NAME MSA_Supriya

SUPPLIER ENTITY NAME Icertis

Commitments 0

IS CONFIDENTIALITY CLAUSE REQUIRED No

This is the parent agreement instance (MSA)

The child agreement can be created from the Associations

Click the “+” sign on the SOW association to create an SOW from within the parent agreement instance.

Create Agreement

Agreements / MSA_Supriya (ICMMasterServicesAgreement_17)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

...

Menu

Versions

History

Associations

All Associations

Communications 0

Statement of Work 1

Document List

Deviations 0

Amendments 0

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/4/2022

ORGANIZATION UNIT
/icertis

1. General Information

AGREEMENT CODE
ICMMasterServicesAgreement_17

2. Vendor Information

VENDOR NAME
Acme Corporation

3. Contract Term

This initiates the process of creating an SOW agreement.

Create Agreement

Statement of Work / MSA Supriya (/ICMStatementofWork_5)

Attributes (Step 1 of 3)

ASSOCIATE AND INHERIT Master Services Agreement

ORGANIZATION UNIT /icertis

1. General Information

AGREEMENT CODE ICMSTATEMENTOFWORK_5

CONTRACT NAME MSA Supriya

* LEGAL ENTITY NAME 1 Icertis

* LEGAL ENTITY ADDRESS 1 Pune

PREVIOUS NEXT DISCARD

The attribute values are inherited from the parent agreement

The remaining steps of agreement creation are same in both approaches

Create Agreement

Agreements / MSA_Supriya (ICMMasterServicesAgreement_17)

Draft

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

Menu

Versions

History

Associations

All Associations

Communications 0

Statement of Work 1

Document List

Associations / Statement of Work

Refine View

Contains

Refine Search here (min 3 char)

CATEGORIES ?

Select Field

All More Views

SAVE VIEW REFRESH

ENTITY NAME	CONTRACT NAME	AGREEMENT CO...	CREATED BY	CREATED DATE	STATUS	
Statement of Work	MSA Supriya	ICMStatementofW...	Supriya Ashtikar	2/4/2022	Draft	...

8 Items Per Page

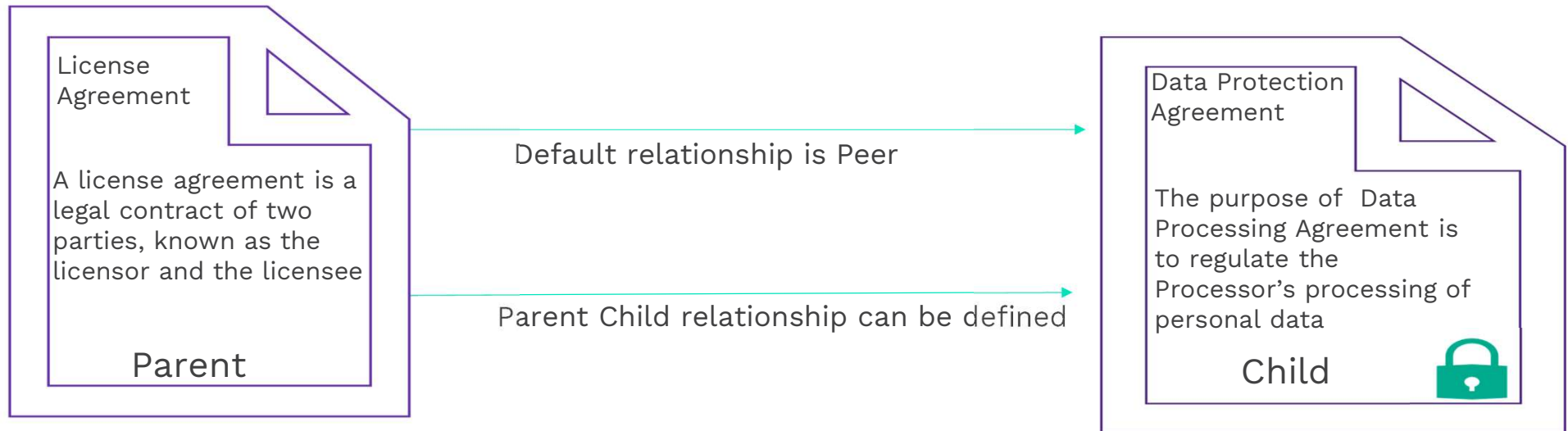
Showing 1 to 1 of 1 Statement of Work

1

The Associations has one Statement of Work created

Relationship between two agreements

- When an agreement is linked/related to another agreement the default relationship defined by the system is Peer
 - Sometimes the relationship can be defined as Parent-Child*
 - Example



- * 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

Summary

Linking Agreements

- Agreements can be linked to each other
- There are two approaches to this
- In first approach, agreements are created using Create Agreement tile
- In second approach, linked agreement can be created from Associations of base agreement
- The attribute values can be inherited from the base agreement in both the approaches
- The default relationship of peer on the agreements can be set to Parent Child on the UI



Thank You