

Contract Request

Icertis Contract Intelligence
Product Training



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1. Introduction to Contract Request

Introduction to Contract Requests

- Contract Request is a form with interactive questions organized in sections and/or pages
- Business user responds to the questions
- Overall response helps decide appropriate agreement contract type to be used and pre-populate relevant attribute's values in agreement

Business user

- only needs to get contract request approved
- is not exposed or should not be exposed to contracting
- cannot decide appropriate Agreement Contract Type to be used
- does not want to own the agreement workflow steps like send for approval and signatures

Contract Administrator

- takes care of agreement creation and workflow steps like send it for approval and signatures

2. Contract Request Process Flow

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3. Creating Contract Requests

Creating Contract Requests - Initiate

Requests

Showing 1 to 1 of 1 Requests

ENTITY NAME	REQUESTOR NAME	REQUEST CODE	CREATED BY	CREATED DATE	STATUS
Request for MSA or SOW	Dinesh	ICMRequestforMSAorSOW_1	CLM Admin	1/4/2022	Contract Created

8 Items Per Page

Create a new contract request from Requests tile.
Requests index page shows the list of existing contract requests

Creating Contract Requests

Icertis

AgreementsRequestsAssociationsCompliancesTemplatesClausesConfigureReportsAI StudioBulk ActionsAdmin

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Create Contract Request

Request for MSA or SOW

Request Type Details

CATEGORY

Default

▼

REQUEST TYPE

Request for MSA or SOW

▼

To create the contract request, select the Category and Request Type

PREVIOUS

NEXT

SAVE

DISCARD


Creating Contract Requests - Enter Details


Create Contract Request


Request for MSA or SOW

Attributes

ORGANIZATION UNIT




REQUEST CODE 

REQUESTOR NAME 

WHICH DEPARTMENT DO YOU BELONG TO


WHO IS THE HEAD OF THE DEPARTMENT




WHAT TYPE OF AGREEMENT DO YOU NEED


* LEGAL ENTITY NAME

* LEGAL ENTITY ADDRESS

EFFECTIVE DATE 



VENDOR NAME




PREVIOUS

NEXT

SAVE

DISCARD

Creating Contract Requests - Review and Create



Enter search text here...

Advanced

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Clauses

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AI Studio

Bulk Actions

Admin

Create Contract Request

Request for MSA or SOW / Supriya

Request Summary

ORGANIZATION UNIT :

/icertis

AVAILABLE CONTRACT TYPES :

Master Services Agreement

Default

CONTRACT TYPE NAME

ICMRequestforMSAorSOW

REQUEST CODE

REQUESTOR NAME

Supriya

WHICH DEPARTMENT DO YOU BELONG TO

IT

WHO IS THE HEAD OF THE DEPARTMENT

Sheetal Sankpal

WHAT TYPE OF AGREEMENT DO YOU NEED

Master Service Agreement

LEGAL ENTITY NAME

Icertis

LEGAL ENTITY ADDRESS

Pune

PREVIOUS

NEXT

CREATE REQUEST

DISCARD

- Review the Request Summary
- 'Previous' to go back and edit
- 'Create Request' to submit

Creating Contract Requests - Created Successfully

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Enter search text here...

Advanced

Requests / Supriya (ICMRequestforMSAorSOW_2)

Draft

EDIT

DELETE

REQUEST REVIEW

SEND FOR APPROVAL

ON HOLD

CANCEL

...

Menu

Details

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Team

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All Associations

Notes

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Details

CREATED BY
Supriya Ashtikar

CREATED ON
2/9/2022

REQUEST CODE
ICMRequestforMSAorSOW_2

REQUESTOR NAME
Supriya

WHICH DEPARTMENT DO YOU BELONG TO
IT

WHO IS THE HEAD OF THE DEPARTMENT
Sheetal Sankpal

WHAT TYPE OF AGREEMENT DO YOU NEED
Master Service Agreement

LEGAL ENTITY NAME
Icertis

LEGAL ENTITY ADDRESS
Pune

EFFECTIVE DATE
1/3/2022

VENDOR NAME
Breve Inc.

Request Review

Send for Approval

Edit or Delete

Viewing Contract Request

- Search for the Request to Edit and View on the Requests index page

^

Icertis

Q Enter search text here...

Advanced

+

🔔

?

👤

Home

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Requests

More Views

CREATE

Refine View

Showing 1 to 2 of 2 Requests

SAVE VIEW

REFRESH

SELECT COLUMNS

EXPORT

🔍

⋮

Contains

Q Refine Search here (min 3 char)

CATEGORIES

Select Field

ENTITY NAME	REQUESTOR NAME	REQUEST CODE	CREATED BY	CREATED DATE	STATUS	
Request for MSA or SOW	Supriya	ICMRequestforMSAorSOW_2	Supriya Ashtikar	2/9/2022	• Draft	👁️ ⋮
Request for MSA or SOW	Dinesh	ICMRequestforMSAorSOW_1	CLM Admin	1/4/2022	» Contract Created	👁️ ⋮

8

Items Per Page

«

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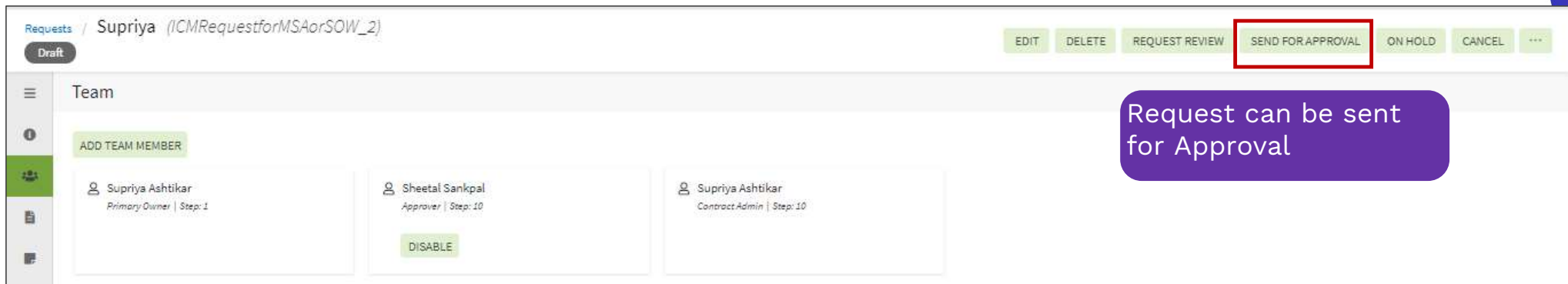
1

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Creating Contract Requests - Reviewing and Approving a Request

- The Contract Request can be sent to Approver (optional step)
 - Requires an Approval rule
- Contract Admin defined in the Team
 - Driven by Rules
 - Ad-hoc selection can be allowed using **Add Team Member**



The screenshot displays the Icertis interface for reviewing and approving a contract request. At the top, the breadcrumb navigation shows 'Requests / Supriya (ICMRequestforMSAorSOW_2)'. Below this, a 'Draft' status is indicated. A toolbar contains several action buttons: 'EDIT', 'DELETE', 'REQUEST REVIEW', 'SEND FOR APPROVAL' (highlighted with a red border), 'ON HOLD', 'CANCEL', and a three-dot menu. The main section is titled 'Team' and features an 'ADD TEAM MEMBER' button. Below this, three team members are listed in cards: Supriya Ashtikar (Primary Owner | Step: 1), Sheetal Sankpal (Approver | Step: 10) with a 'DISABLE' button, and Supriya Ashtikar (Contract Admin | Step: 10). A purple callout box on the right states 'Request can be sent for Approval'.

Reviewing and Approving a Request – Primary Owner View

Requests / Supriya (ICMRequestforMSAorSOW_2)

Waiting For Approval from Sheetal Sankpal

ON HOLDCANCELCOPY EXISTING CONTRACT REQUESTBROADCASTSMART LINKS

Menu

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All Associations

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CREATED BY

Supriya Ashtikar

CREATED ON

2/9/2022

ORGANIZATION UNIT

/icertis

REQUEST CODE

ICMRequestforMSAorSOW_2

REQUESTOR NAME

Supriya

WHICH DEPARTMENT DO YOU BELONG TO

IT

WHO IS THE HEAD OF THE DEPARTMENT

Sheetal Sankpal

WHAT TYPE OF AGREEMENT DO YOU NEED

Master Service Agreement

LEGAL ENTITY NAME

Icertis

LEGAL ENTITY ADDRESS

Pune

EFFECTIVE DATE

1/3/2022

VENDOR NAME

Breve Inc.

Reviewing and Approving a Request – Approver View

Requests / Supriya (ICMRequestforMSAorSOW_2)

Approved EDIT DELETE CREATE CONTRACT RETURN TO REQUESTOR COPY EXISTING CONTRACT REQUEST ...

Details

CREATED BY	CREATED ON	ORGANIZATION UNIT	
Supriya Ashtikar	2/9/2022	/icertis	
REQUEST CODE	REQUESTOR NAME	WHICH DEPARTMENT DO YOU BELONG TO	WHO IS THE HEAD OF THE DEPARTMENT
ICMRequestforMSAorSOW_2	Supriya	IT	Sheetal Sankpal
WHAT TYPE OF AGREEMENT DO YOU NEED	LEGAL ENTITY NAME	LEGAL ENTITY ADDRESS	EFFECTIVE DATE
Master Service Agreement	Icertis	Pune	1/3/2022
VENDOR NAME			
Breve Inc.			

Once the request is approved, the Create Contract action is visible to the user with Contract Admin rule

Request Conversion – Create Agreement

- The Agreement can be created based on the attribute value
- ‘What type of Agreement do you need’
- Based on the value ‘Master Service Agreement or Statement of Work’ the agreement creation page will be selected accordingly

Create Agreement

Master Services Agreement

Contract Type Details (Step 1 of 4)

CATEGORY

Procurement Contracts

CONTRACT TYPE NAME

Master Services Agreement

TYPE OF PAPER

Own

This form lets you create a Master Service Agreement

PREVIOUS

NEXT

SAVE

DISCARD

Request Conversion – Create Agreement

Create Agreement

Master Services Agreement

Attributes (Step 2 of 4)

1. General Information

AGREEMENT CODE ?

CONTRACT NAME ?

* LEGAL ENTITY NAME

1 Icertis

* LEGAL ENTITY ADDRESS

1 Pune

DEPARTMENT

1 IT

DEPARTMENT HEAD

1 Sheetal Sankpal;

IS CONFIDENTIALITY CLAUSE REQUIRED

No

2. Vendor Information

PREVIOUS

NEXT

SAVE

DISCARD

Some attribute's values in the agreement are inherited from the Contract Request

Request Conversion – Create Agreement

Agreements / (ICMMasterServicesAgreement_25)

Draft

SMART LINKSLOCKOPEN IN OFFICE FOR THE WEBCONFIDENTIALCOMPARE DOCUMENTS...

Summary

CREATED BY
Supriya Ashtikar

CREATED ON
2/9/2022

ORGANIZATION UNIT
/icertis

CONTRACT REQUEST
[ICMRequestforMSAorSOW_2](#)

1. General Information

2. Vendor Information

3. Contract Term

4. Signatory Information

The agreement creation flow is similar except there is a hyperlink to view the request from which it got created

Request Status after Agreement creation

- The request status is Contract Created after the agreement is created
- The user can navigate to the contract by using the hyperlink shown along with the Status

[Requests](#) / [Supriya](#) (ICMRequestforMSAorSOW_2)

[Contract Created](#)[COPY EXISTING CONTRACT REQUEST](#)[SMART LINKS](#)

Details

CREATED BY Supriya Ashtikar	CREATED ON 2/9/2022	ORGANIZATION UNIT /icertis	CONTRACT ICMMasterServicesAgreement_25 (Contract Drafted)
REQUEST CODE ICMRequestforMSAorSOW_2	REQUESTOR NAME Supriya	WHICH DEPARTMENT DO YOU BELONG TO IT	WHO IS THE HEAD OF THE DEPARTMENT Sheetal Sankpal
WHAT TYPE OF AGREEMENT DO YOU NEED Master Service Agreement	LEGAL ENTITY NAME Icertis	LEGAL ENTITY ADDRESS Pune	EFFECTIVE DATE 1/3/2022
VENDOR NAME Breve Inc.			



Thank You