

# Agenda – Part A

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



# Authoring Agreements

Icertis Contract Intelligence  
Product Training



# Contents

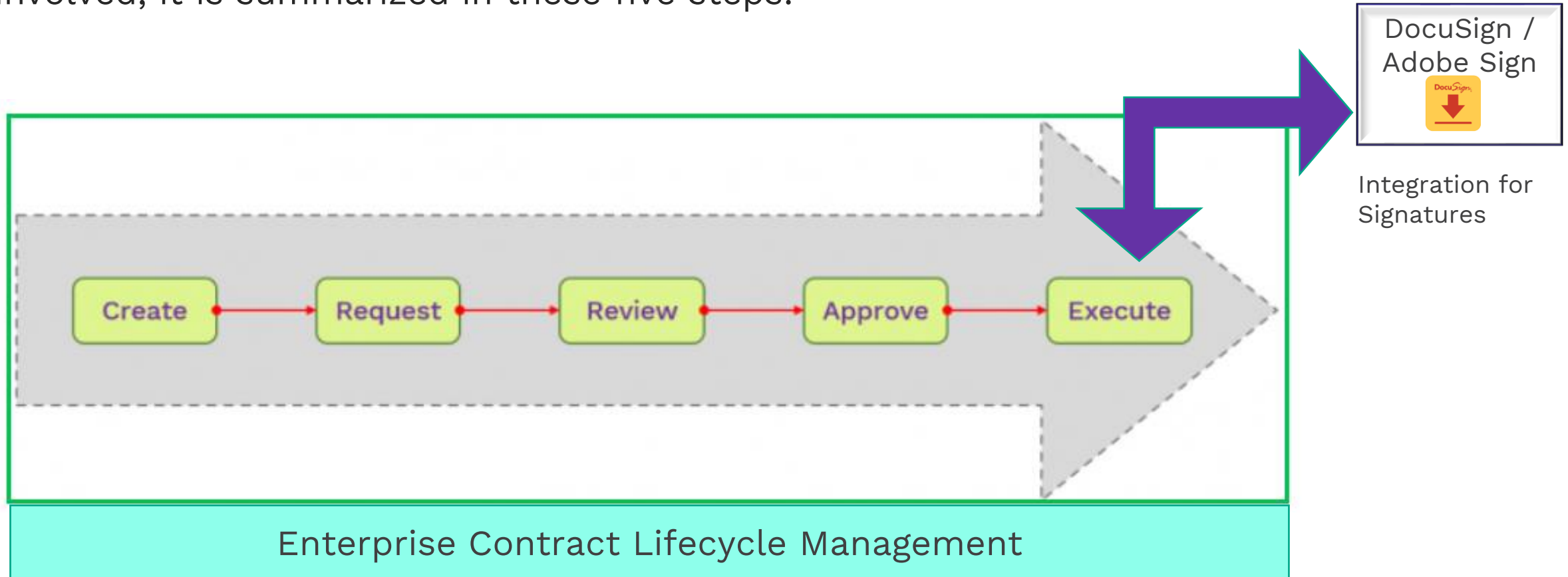
- 01 Create Agreements using own paper
- 02 Modify Agreements
- 03 Create Agreements using third party paper



# 1. Create Agreements using own paper


# Contract Lifecycle Management

While the actual workflow of an Agreement in ICI can be quite complex and involved, it is summarized in these five steps:



# Starting Point

- Users can create an agreement in the following different ways:



Using Workbench  
create option



Using Create button  
available on the  
Agreement Index page



Copying the existing  
agreement to create a  
new agreement record



# Create Agreement

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

AI Studio

More

Agreements

More Views

Refine View

Showing 1 to 8 of 30 Agreements

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

ENTITY NAME	CONTRACT NAME	AGREEMENT				
Master Services Agre...	Contracting Agreement	ICMMasterServicesAgr...	Icertis Admin	2/11/2022	Draft	
Master Services Agre...	Kelley MSA 2	ICMMasterServicesAgr...	Icertis Admin	2/10/2022	Approved	
Master Services Agre...		ICMMasterServicesAgr...	Supriya Ashtikar	2/9/2022	Executed	
Master Services Agre...	MSA_Supriya	ICMMasterServicesAgr...	Supriya Ashtikar	2/4/2022	Waiting For Signature	
Master Services Agre...		ICMMasterServicesAgr...	CLM Admin	2/8/2022	Superseded	
Master Services Agre...	MSA Dinesh	ICMMasterServicesAgr...	CLM Admin	2/7/2022	Executed	

Workbench Create options

Create agreement using CREATE button on Agreement index page

Icertis

Icertis Confidential

8

# Create Agreement

Home

Agreements

Requests

Associations

Compliances

Templates

Clause

Agreements

More Views

Refine View

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

Showing 1 to 8 of 30 Agreements

ENTITY NAME	CONTRACT NAME	AG
Master Services Agre...	Contracting Agreement	IC
Master Services Agre...	Kelley MSA 2	IC
Master Services Agre...		IC
Master Services Agre...	MSA_Supriya	IC
Master Services Agre...		IC
Master Services Agre...	MSA Dinesh	IC

Create

Agreement

Amendment

Request

Association

Template

Clause

Contract Type

Rule

Masterdata

Cascade

Linkage Type

Currency

Clause Group

+

Workbench Create options

CREATE

FRESH

SELECT COLUMNS

EXPORT

STATUS

Draft

Approved

Executed

Waiting For Signature

Superseded

Executed



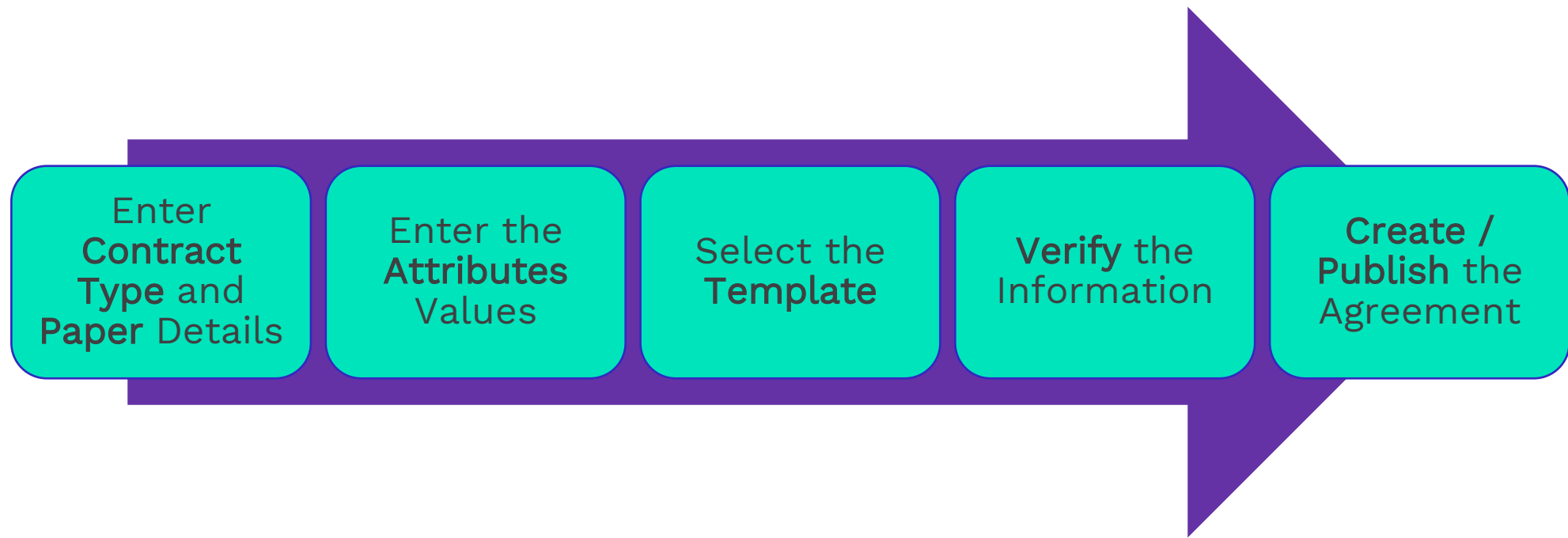
# Create Agreement

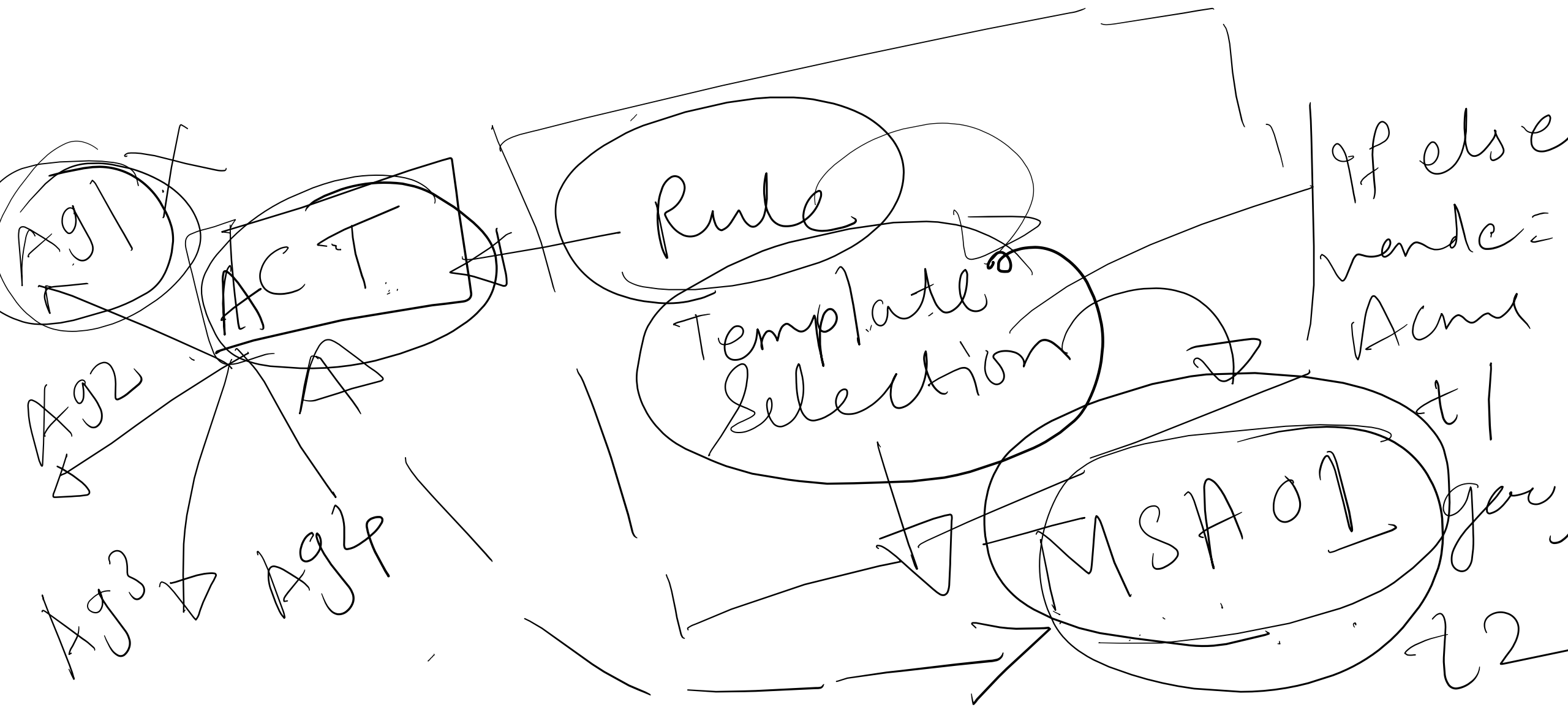
The screenshot displays the Icertis user interface. At the top, there is a navigation bar with the Icertis logo, a search bar, and a status indicator 'Advanced'. Below this is a menu bar with various options: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, Bulk Actions, and Admin. The main content area shows the details of an agreement titled 'MSA\_Supriya (ICMMasterServicesAgreement\_3)'. A status bar indicates 'Waiting For Internal Signature from Sheetal Sankpal'. On the right side of the agreement details, there is a dropdown menu with options: 'Agreement Deviation Report', 'Compare Clause Changes', 'Recall', and 'Copy Record'. The 'Copy Record' option is highlighted with a red rectangular box. The left sidebar shows a 'Summary' section with fields for 'CREATED BY' (Supriya Ashtikar), 'CREATED ON' (1/4/2022), and 'ORGANIZATION UNIT' (/icertis). Below these fields is a section titled '1. General Information'.

Copy an existing agreement to create a new agreement

## Authoring Contract Steps

- You initiate creation of an Agreement by clicking **Create Agreement** under the **Agreement Management** tile
- Generally, in ICI, creating an Agreement comprises of the following main steps:





# Enter Contract Type and Paper Details

- The first step of creating an agreement is to select the **Contract Type Name** and the **Type of Paper**
- Every Agreement Type contains attributes & templates. A description field can be set for a contract type at the configuration time.
- **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

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

## Enter the Attributes Values

- Depending on the selected contract type, you need to provide values for the attributes(metadata). In this case the selected contract type is **Master Services Agreement**
- 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.

The screenshot shows a web form titled 'Create Agreement' with a sub-header 'Master Services Agreement' highlighted by a red box. Below this is a section 'Attributes (Step 2 of 4)'. Inside this section, there is a field for 'ORGANIZATION UNIT' with the value '/icertis' and a search icon. Below this is a list of five attribute groups, each in a separate row: '1. General Information', '2. Vendor Information', '3. Contract Term', '4. Signatory Information', and '5. Miscellaneous'. This entire list is enclosed in a red rectangular box. At the bottom of the form, there is a 'BUSINESS STATUS' field with a question mark icon and a dropdown menu showing 'Draft'. The footer contains four buttons: 'PREVIOUS', 'NEXT' (highlighted in green), 'SAVE', and 'DISCARD'.

# Enter the Attributes Values

- **General Information-** This is the first group of attributes.

**Legal Entity Name-** this is an open field allowing the user to enter the name of the entity. This field has a red asterisk ★ indicating it is a mandatory field.

Some attribute's values are added to the agreement. Some attributes help to determine the approval flow. Some attributes add clauses to the agreement

Attributes (Step 2 of 4)

1. General Information


AGREEMENT CODE ⓘ

CONTRACT NAME ⓘ

★ LEGAL ENTITY NAME

★ LEGAL ENTITY ADDRESS

DEPARTMENT

DEPARTMENT HEAD  

IS CONFIDENTIALITY CLAUSE REQUIRED ☐ No



# Localization of attributes

- Attributes and its values can be localized to support multiple languages using the translation editor in the platform.

Attribute in German

1. General Information

Vertrags-ID	ICMMasterServiceAgreement_22	?
Kontraktname	MSA Dinesh	?
Name der rechtlichen Entität *	Icertis	
Legal Entity Address *	Icertis	
Department	Maschinenbau	x ▼
Department Head	Sales	
	Maschinenbau	
	Procurement	
	Humanressourcen	
	IT	
Is Confidentiality Clause Required		

Attribute values in German

# Enter the Attributes Values


- **Vendor Information-**
- This group of attributes capture vendor information. In this case, when we select a Vendor from the list, ICI auto-populates the Address, City, State and so on.
- The Vendor's Name can be filtered based on its rating.

Some attributes get their data from a Masterdata list. For example:  
Vendor Master  
Supplier Master  
Product List  
Employees  
Departments or Regions

2. Vendor Information

VENDOR RATING	Excellent
VENDOR NAME	Acme Corporation
VENDOR ADDRESS	14711 NE 29th Pl #100
VENDOR COUNTRY	USA
VENDOR STATE	WA
VENDOR CITY	Bellevue

# Enter the Attributes Values

VENDOR NAME	<input type="text" value="Search vendor name"/>	
VENDOR ADDRESS	Acme Corporation	

### Select Vendor Name

REFRESH

SELECT COLUMNS

EXPORT

Contains

Refine Search here (min 3 char)

CATEGORIES ?  
Select Field

CLEAR ALL

Showing 1 to 4 of 4 records

NAME	VENDOR NAME	
<input type="radio"/>	Acme Corporation	
<input type="radio"/>	Acme Corporation	
<input type="radio"/>	Breve Inc.	
<input type="radio"/>	Indus Ltd.	

8

Items Per Page

<<

<

1

>

>>

SELECT

CLEAR

ADD NEW RECORD

SELECTED RECORDS: None

The Vendor Master has a pre-configured list of vendors. Users can be authorized to **add new vendors** to the list. If the list has many vendors, users can search for a vendor by using the Search box.

# Filter Lookup Attributes on Vendor Rating

VENDOR RATING

Excellent

VENDOR NAME

Search vendor name

Acme Corporation

Breve Inc.

VENDOR ADDRESS

Select Vendor Name

Refine View

Showing 1 to 2 of 2 records

REFRESH

SELECT COLUMNS

EXPORT

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

VENDOR PERFORMANCE RATING	
Excellent	
NAME	VENDOR NAME
	Acme Corporation
	Breve Inc.

1

The Vendor Master has a pre-configured list of vendors. Users can be authorized to **add new vendors** to the list. If the list has many vendors, users can search for a vendor by using the Search box.

# Enter the Attributes Values

Contracts can have:

Expiration Date

Effective Date

Auto Renewal

Renewal Period can be specified in months

Max Renewals identifies the number of renewals

Number of renewals counts the number of renewals

Attributes (Step 2 of 4)

3. Contract Term

EFFECTIVE DATE ?	<input type="text" value="1"/>
CONTRACT TERM	<input type="text" value="IN MONTHS"/>
EXPIRY DATE ?	<input type="text" value=""/>
RENEWAL ?	<input checked="" type="checkbox"/> Yes
RENEWAL PERIOD ?	<input type="text" value="1"/>
MAX RENEWALS ?	<input type="text" value="2"/>

PREVIOUS NEXT SAVE DISCARD

## Enter the Attributes Values

- **Contract Term:** This group of attributes capture the effective and expiry date of the contract.
- A combination of effective date and contract term auto-calculates the expiry date. Contract Term is a number that can be configured in days, months or years.
- The contract can be set to auto renew using the renewal attribute. It can be extended for a defined period using the renewal period

### 3. Contract Term

EFFECTIVE DATE ?	1/3/2022
CONTRACT TERM	6
	IN MONTHS
EXPIRY DATE ?	7/3/2022
RENEWAL ?	<input checked="" type="radio"/> Yes
RENEWAL PERIOD ?	
MAX RENEWALS ?	
NUMBER OF RENEWALS ?	





# 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

Attributes (Step 2 of 4)

4. Signatory Information

SIGNATURE TYPE ?	<input type="text" value="Search signature type"/>
SIGNATURE SEQUENCE ?	<input type="text" value="External First"/>
EXTERNAL SIGNATORY ?	<input type="text" value="Please select user"/> 
EXTERNAL SIGNATORY DESIGNATION	<input type="text"/>
INTERNAL SIGNATORY	<input type="text" value="Please select user"/> 
INTERNAL SIGNATORY DESIGNATION	<input type="text"/>

5. Miscellaneous

# Signature Type

- The signature type attribute has multiple values to support the various signature type
- Electronic- both parties will sign the contract electronically. The system will be integrated with DocuSign or Adobe Sign.
- Manual- both parties will sign the contract manually (wet signatures).
- Hybrid- this signature type allows a mix of manual and electronic signatures.

4. Signatory Information

SIGNATURE TYPE ?

SIGNATURE SEQUENCE ?

EXTERNAL SIGNATORY ?

Search signature type

Electronic Signature

Manual Signature

Hybrid Signature

# Signature Sequence

- The signature sequence attribute controls the sequence of the signature flow.
- External First or Internal First determines if your own organization will sign first or the external vendor.
- Mixed Signature type can control a mix of signatures.
  - Example-

4. Signatory Information

SIGNATURE TYPE ?

SIGNATURE SEQUENCE ?

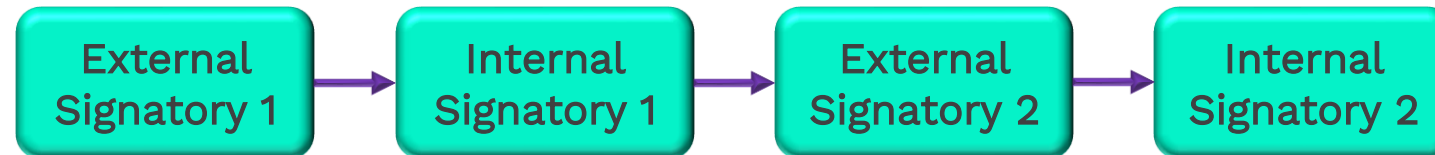
EXTERNAL SIGNATORY ?

Search signature type

Electronic Signature

Manual Signature

Hybrid Signature





## Select the Template

- Once the attributes/ metadata values are provided, the system displays the configured templates required for creating the contract.

Select Template (Step 3 of 4)

Select system template ?

  [CLEAR SELECTION](#)

☒ MSA Template

[Preview Template](#)

[PREVIOUS](#) [NEXT](#) [SAVE](#) [DISCARD](#)

# Inline Associations

- An **optional screen** for adding inline associations can be configured. This will allow users to add supporting documents during the agreement creation process

Create Agreement

Master Services Agreement / MSA\_Supriya\_Acme (ICMMasterServicesAgreement\_10)

Add Association

Communications (1)

ADD

REFRESH

SELECT COLUMNS

ENTITY NAME	NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS	
Communications		ICMCommunications_3	Supriya Ashtikar	1/10/2022	● Draft	...

8

Items Per Page

Showing 1 to 1 of 1 Communications

<<

<

1

>

>>

## Verify the information

- On the last step, the user is presented with all the information entered so far, for review and verification.
- A preview of the agreement document is available through the Document Preview menu.

Verify (Step 3 of 3)

AGREEMENT	MSA_Supriya
ORGANIZATION UNIT	/icertis

1. General Information

AGREEMENT CODE	ICMMasterServicesAgreement_6
CONTRACT NAME	MSA_Supriya
* LEGAL ENTITY NAME	↓ Icertis
* LEGAL ENTITY ADDRESS	↓ Pune
DEPARTMENT	↓ Engineering
DEPARTMENT HEAD	↓ Finance Manager
IS CONFIDENTIALITY CLAUSE REQUIRED	No

PREVIOUS

NEXT

UPDATE

DISCARD



## Create / Publish the Agreement

- After the information is verified, there are three options to create the agreement:

### Create

- The agreement is created but not published
- No version is created
- Only Primary Owner is added to the team

### Create and Publish

- The agreement is created and published using the selected template
- First version of the agreement document is created (word and pdf)
- Team rules (if any) is evaluated, and workflow team members added
- Values for mandatory attributes must be entered

### Create and Send for Approval

- The agreement is created and published using the selected template
- First version of the agreement document is created (word and pdf)
- Mandatory and prerequisite association must be added
- Approval workflow is started
- Status is changed to *Waiting for Approval*

# Create

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

CANCEL

...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications0+

Statement of Work0+

Document List

Deviations0

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_6

2. Vendor Information

VENDOR NAME  
Acme Corporation

3. Contract Term

EXPIRY DATE  
7/10/2022

EFFECTIVE DATE  
1/10/2022

If the contract is **Created**, the Status displays as **"Draft"**(this is a rough draft of the agreement record)

# Create

- When the contract is **Created**,
  - **(Versions)** The contract document is not yet formed. There are no contract versions prepared.
  - **(Preview)** There is no preview available as the contract is not yet prepared by the system.
  - **(Team)** The only member on the team is the contract creator. The contract creator becomes the Primary Owner for the agreement.



Note: Every contract record has a Team of users. These users are reviewers, approvers or signatories of the contract document.

# Create

- When the contract is **Created**,
  - **(Team)** The only member on the team is the contract creator. The contract creator becomes the Primary Owner for the agreement.

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

SMART LINKSLOCKCONFIDENTIALCOMPARE DOCUMENTSCOLLABORATE...📄

Menu

Communications0+Statement of Work0+Document ListAmendments0Commitments0Agreement ClausesTeam

Team

AllApproversSignatoriesCoreExtended

ADD NEW MEMBERCLEAR GRID FILTERS⌵⌶⌷

Refine Search Here...

USER NAME	BY R...	EMAIL ID	TEAM ROLE	STEP NUMBER	ADDITIONAL INFORMATION	ACTION STATU
Supriya Ashtikar	No	supriya.ashtikar@icertis.com	Primary Owner	Step 1		

8Items Per Page

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

Note: Every contract record has a Team of users. These users are reviewers, approvers or signatories of the contract document.

# Create

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

SMART LINKS LOCK CONFIDENTIAL COMPARE DOCUMENTS COLLABORATE ...

Menu

- Dashboard
- Summary
- Details
- Versions
- History
- Associations
  - All Associations
  - Communications 0 +
  - Statement of Work 0 +

Summary

CREATED BY: Supriya Ashtikar

CREATED ON: 1/6/2022

ORGANIZATION UNIT: /icertis

1. General Information

AGREEMENT CODE: ICMMasterServicesAgreement\_6

2. Vendor Information

VENDOR NAME: Acme Corporation

3. Contract Term

Broadcast

Agreement Deviation Report

Compare Clause Changes

Edit

Publish

Delete

Cancel

This agreement can be published using the Publish button

# Published Draft

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

CANCEL

...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications

Statement of Work

Document List

Versions

Refine Search Here...

CLEAR GRID FILTERS

VERSI...	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
1	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	1/6/2022 5:11:16 PM		<div>W</div> <div></div>

8

Items Per Page

1 to 1 of 1 items

<<

<

1

>

>>

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



# Published Draft

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

Download Upload Document Edit Send For Approval Cancel ...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications 0 +

Statement of Work 0 +

Document List

Versions

Refine Search Here...

CLEAR GRID FILTERS

VERSI...	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
1	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	1/6/2022 5:11:16 PM		<div>Word PDF</div>

8 Items Per Page

< 1 > >>

Once published, the contract document is formed and available in Word and PDF formats.

# Agreement Team

The screenshot displays the 'Agreement Team' interface. At the top, there's a 'Draft' status indicator and a row of action buttons: DOWNLOAD, UPLOAD DOCUMENT, EDIT, SEND FOR APPROVAL, CANCEL, and a menu icon. Below this is a 'Menu' bar with a 'Team' tab selected. A 'Progress View' label is overlaid on the right side of the menu bar. The left sidebar contains a list of navigation items: All Associations, Communications (0), Statement of Work (0), Document List, Deviations (0), Amendments (0), Commitments (0), Agreement Clauses, and Team (highlighted). The main content area shows the 'Team' tab with an 'APPROVAL STATUS' of 'NA'. It features three main sections: 'GENERATE' (Primary Owner: Supriya Ashtikar), 'APPROVE' (Step 10, Not Started, APPROVER: 1 of 1 required, Finance Manager), and 'CHECK & SIGN' (EXTERNAL SIGNATURE: Step 10, Not Started, 1 of 1 required, Supriya Ashtikar; INTERNAL SIGNATURE: Step 10, Not Started, 1 of 1 required, Sheetal Sankpal). A toolbar above the main content area includes buttons for ADD NEW MEMBER, REASSIGN, ENABLE, DISABLE, REMOVE, and a menu icon.

Team members have different roles:

- Primary Owner:** Requestor/ Creator of the agreement document.
- Approver:** Group of users that approve the contract prior to signing of the document.
- External/ Internal Signature:** Users who sign the contract

# Agreement Preview

Preview

The screenshot displays the 'Agreement Preview' interface. At the top, a 'Draft' button is on the left, and a row of action buttons (DOWNLOAD, UPLOAD DOCUMENT, EDIT, SEND FOR APPROVAL, CANCEL, and a red-outlined icon) is on the right. The main area is divided into three columns: 'GENERATE', 'APPROVE', and 'CHECK & SIGN'. The 'GENERATE' column shows the 'Primary Owner' as Supriya Ashtikar. The 'APPROVE' column shows 'Step 10' as 'Not Started' with an 'APPROVER' section indicating '1 of 1 required' and a checkbox for 'Finance Manager'. The 'CHECK & SIGN' column shows 'Step 10' as 'Not Started' with 'EXTERNAL SIGNATURE' and 'INTERNAL SIGNATURE' sections, both indicating '1 of 1 required' and listing 'Supriya Ashtikar'. A 'Preview' sidebar on the right shows a document titled 'MASTER SERVICES AGREEMENT' with a preview of its text, including the effective date '1/10/2022' and the parties 'Icertis, Pune' and 'Acme Corporation'. A purple callout box in the bottom left explains the preview functionality.

Draft

Team

APPROVAL STATUS NA

ADD NEW MEMBER REASSIGN ENABLE DISABLE ...

GENERATE

Primary Owner  
Supriya Ashtikar

APPROVE

Step 10 Not Started

APPROVER  
1 of 1 required  
☐ Finance Manager

CHECK & SIGN

EXTERNAL SIGNATURE

Step 10 Not Started

1 of 1 required  
Supriya Ashtikar

INTERNAL SIGNATURE

Step 10 Not Started

Preview

To see full document [click here](#)

1 of 2

**MASTER SERVICES AGREEMENT**

This Master Services Agreement (this "Agreement") is made effective as of **1/10/2022** (the "Effective Date").

BETWEEN:

**Icertis, Pune** (the "Company")

AND

**Acme Corporation, 14711 NE 29th PI #100, 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 (the "Representative"), Company engages the Supplier to provide the Services on the express and essential condition that the Services shall be performed by the Representative and by no other person. In the event that the Representative is no longer (i) able or willing to perform the Services, or (ii) active with or employed by the Supplier, for any reason whatsoever, Company shall have the right to terminate this Agreement immediately upon written notice, without prejudice to Company's rights hereunder. Notwithstanding the foregoing, the Supplier may replace the Representative with another individual reasonably satisfactory to Company with the prior written consent of Company.

The agreement can be previewed using the Preview option in the top right corner of the agreement screen. It displays the agreement document with comments (if any added)

# Chevron View of the Agreement- Before Publish

The screenshot displays the Icertis Agreement Management interface. The top navigation bar includes the Icertis logo, a search bar, and an 'Advanced' button. Below this is a horizontal menu with various options: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, Bulk Actions, and Admin. The 'Agreements' section is selected, showing a breadcrumb trail: 'Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_8)'. A 'Draft' button is visible next to the breadcrumb. The left sidebar menu contains options like Menu, Dashboard, Summary (selected), Details, Versions, History, Associations, All Associations, Communications, Statement of Work, Document List, and Amendments. The main content area shows the 'Summary' tab for the agreement 'MSA\_Supriya (ICMMasterServicesAgreement\_8)'. The summary includes fields for 'CREATED BY' (Supriya Ashtikar), 'CREATED ON' (1/7/2022), 'AGREEMENT CODE' (ICMMasterServicesAgreement\_8), 'CONTRACT NAME' (MSA\_Supriya), 'VENDOR NAME' (Acme Corporation), 'EXPIRY DATE' (7/17/2022), and 'EFFECTIVE DATE' (1/17/2022). The 'Workflow Status' panel on the right shows a timeline of events: 'Agreement Copied' and 'Agreement Created', both dated 1/7/2022 1:41:10 PM, with 'Supriya Ashtikar' as the Primary Owner. Below these are three status boxes indicating no approvers, external signatories, or internal signatories in the team. A 'VIEW TEAM' button is at the bottom of the panel.

**Workflow Status**

- Agreement Copied  
1/7/2022 1:41:10 PM  
Primary Owner  
✓ Supriya Ashtikar
- Agreement Created  
1/7/2022 1:41:10 PM  
Primary Owner  
✓ Supriya Ashtikar
- There are no approvers in the team
- There are no external signatories in the team
- There are no internal signatories in the team

**VIEW TEAM**

# Chevron View of the Agreement- After Publish

The screenshot displays the Icertis agreement management interface. The top navigation bar includes the Icertis logo, a search bar, and an 'Advanced' link. Below this is a horizontal menu with various options: Home, Agreements, Requests, Associations, Compliances, Templates, Clauses, Configure, Reports, Bulk Actions, and Admin. The 'Agreements' section is selected, showing a breadcrumb trail: 'Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)'. A 'Draft' button is visible next to the breadcrumb. The left sidebar menu contains options like Menu, Dashboard, Summary (selected), Details, Versions, History, Associations, All Associations, Communications, Statement of Work, Document List, and Deviations. The main content area shows the 'Summary' tab for the agreement 'MSA\_Supriya (ICMMasterServicesAgreement\_6)'. It displays key information: 'CREATED BY: Supriya Ashtikar', 'CREATED ON: 1/6/2022', 'AGREEMENT CODE: ICMMasterServicesAgreement\_6', 'CONTRACT NAME: MSA\_Supriya', 'VENDOR NAME: Acme Corporation', 'EXPIRY DATE: 7/17/2022', and 'EFFECTIVE DATE: 1/17/2022'. The 'Workflow Status' panel on the right shows a timeline of events: 'Agreement Copied' (1/6/2022 2:50:57 PM, Primary Owner, Supriya Ashtikar), 'Agreement Created' (1/6/2022 2:50:57 PM, Primary Owner, Supriya Ashtikar), and 'Agreement Published' (1/6/2022 5:11:17 PM, Primary Owner, Supriya Ashtikar). Below these are pending steps: 'Approve - Step 10' (Approver: Finance Manager), 'External Signature - Step 10' (External Signatory: Supriya Ashtikar), and 'Internal Signature - Step 10' (Internal Signatory: Sheetal Sankpal). A 'VIEW TEAM' button is at the bottom of the panel.

**Workflow Status**

- Agreement Copied**  
1/6/2022 2:50:57 PM  
Primary Owner  
Supriya Ashtikar
- Agreement Created**  
1/6/2022 2:50:57 PM  
Primary Owner  
Supriya Ashtikar
- Agreement Published**  
1/6/2022 5:11:17 PM  
Primary Owner  
Supriya Ashtikar
- Approve - Step 10**  
Approver ( 1 of 1 required )  
Finance Manager
- External Signature - Step 10**  
External Signatory ( 1 of 1 required )  
Supriya Ashtikar
- Internal Signature - Step 10**  
Internal Signatory ( 1 of 1 required )  
Sheetal Sankpal

**VIEW TEAM**

# Agreement Index Page

- Navigate to Agreement Management > Agreements. This page displays a list of all existing agreements. It is the Agreement Index page.

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

Bulk Actions

Admin

Agreements

More Views

Contains

Refine Search here (min 3 char)

CATEGORIES

Select Field

Showing 1 to 7 of 7 Agreements

SAVE VIEW

REFRESH

SELECT COLUMNS

EXPORT

Table View

Grid View

ENTITY NAME	CONTRACT NAME	AGREEMENT CODE	CREATED BY	CREATED DATE	STATUS	
Master Services Agreement	MSA_Supriya					
Master Services Agreement	MSA_Supriya					
Master Services Agreement	MSA_Supriya					
Master Services Agreement	MSA_Supriya					
Statement of Work	SOW Dinesh					
Master Services Agreement	MSA Dinesh Request	ICMMasterServicesAgreem...	CLM Admin	1/4/2022	Draft	
Master Services Agreement	MSA Dinesh	ICMMasterServicesAgreem...	CLM Admin	1/3/2022	Waiting For External Sign...	

8

Items Per Page

<<

<

1

>

>>

Click the three dots (...) on the agreement index page. It populates the actions menu where you can perform actions such as View Document or Copy agreement record

Preview Document

View Smart Links

Copy Record

View Details

# 1. Modify Agreements

# Action buttons

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

DOWNLOAD UPLOAD DOCUMENT EDIT

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

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications

Statement of Work

Document List

Deviations

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT  
/icertis

**Download:** The word version of the document can be downloaded using the Download button. Once downloaded, the contract's clause text and metadata can be modified.

**Upload Document:** The contract can be modified and uploaded back to the system using the Upload Document button. The system prepares another version of the contract document.

**Edit:** The contract metadata values can be modified using the Edit button. Clause text edits/ changes are not possible.



# Online Edit

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

Menu

Dashboard

Summary

Summary

CREATED BY  
Supriya Ashtikar

1

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

...

The agreement can be modified using the online office word version.

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft - In Editing (Initiated by Supriya Ashtikar)

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_6

CONTRACT NAME  
MSA\_Supriya

2. Vendor Information

VENDOR NAME  
Acme Corporation

3. Contract Term

EXPIRY DATE  
7/17/2022

EFFECTIVE DATE  
1/17/2022

2

DISCARD CHANGES

OPEN OFFICE IN FULL SCREEN

CHECK IN

COPY EDITOR LINK

COPY RECORD

Word

MSA\_Supriya - Saved to Icertis

Supriya Ashtikar

**MASTER SERVICES AGREEMENT**

This Master Services Agreement (this "Agreement") is made effective as of 1/17/ "Effective Date").

BETWEEN:

Icertis , Pune (the "Company")

AND

Acme Corporation , 14711 NE 29th Pl #100 ,USA (the "Supplier")

**1. Services and Deliverables**

**1.1.** Company hereby retains the Supplier to provide Company services (the "S to supply the work product (the "Deliverables") described in the Statermer Statement of Work provides that the Services shall be performed by a snc

Page 1 of 3 888 words English (U.S.) 100% Fit Give Feedback to Microsoft

# Online Edit

Agreements / MSA\_Supriya\_Acme (ICMMasterServicesAgreement\_10)

Draft - In Editing (Initiated by Supriya Ashtikar)

3

DISCARD CHANGES OPEN OFFICE IN SPLIT VIEW CHECK IN COPY EDITOR LINK COPY RECORD

Word MSA\_Supriya\_Acme - Saved to Icertis

Search (Alt + Q)

Supriya Ashtikar

File Home Insert Layout References Review View Help Editing

Calibri (Body) 12 A A B I U

Styles Find Transcribe

Comments

Agreement opened in Full Screen mode.

After making changes, users can Check In the document or Discard the changes.

**MASTER SERVICES AGREEMENT**

This Master Services Agreement (this "Agreement") is made effective as of 1/3/2022 (the "Effective Date").

BETWEEN:

Icertis , Pune (the "Company")

AND

Acme Corporation , 14711 NE 29th Pl #100 ,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

Page 1 of 3 888 words English (U.S.)

100% Fit Give Feedback to Microsoft

## Online Edit

Home

Agreements

Requests

Associations

Compliances

Templates

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft - In Editing (Initiated by Supriya Ashtikar)

Summary

CREATED BY  
Supriya Ashtikar

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_6

2. Vendor Information

VENDOR NAME  
Acme Corporation

3. Contract Term

EXPIRY DATE  
7/17/2022

Check In Edits from Office on the Web

B I U abc ☰ ☷ ☹ ☺ ×₂ ×² ☒ ☳ ☴ ☵ ☶ Format (inherited font) (inherited size)

A ▼ 🔍 ▼

After making changes to the agreement, click the **Check In** button to sync the changes from the online Word version to ICI.

Note:

- Last updated on : 3 minutes ago. Click [refresh](#) to sync updates. ?
- Concurrent editing access on the document will be revoked for other active users.

CHECK IN REDLINE CHECK IN

# Versions and History

- History of changes made to the contract is maintained.

Agreements / MSA\_Supriya\_Acme (ICMMasterServicesAgreement\_10)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications

History

All

Draft

Approval

Execution

Post-Execution

CLEAR GRID FILTERS

Q Refine Search Here...

EVENT	USER NAME	USER ROLE	DATE AND TIME	DETAIL	NOTES
Agreement Downloaded	Supriya Ashtikar	Primary Owner, Internal Signatory, External Signatory, ...	2/1/2022 3:19:09 PM	<a href="#">Show Changes</a>	
Agreement Downloaded	Supriya Ashtikar	Primary Owner, Internal Signatory, External Signatory, ...	2/1/2022 3:19:09 PM	<a href="#">Show Changes</a>	
Document Uploaded	Supriya Ashtikar	Primary Owner, Internal Signatory, External Signatory, ...	2/1/2022 3:16:49 PM	<a href="#">Show Changes</a>	Change
Online Editing Session Ended	Supriya Ashtikar	Primary Owner, Internal Signatory, External Signatory, ...	2/1/2022 3:16:49 PM	<a href="#">Show Changes</a>	Docume
Agreement Modified	Supriya Ashtikar	Primary Owner, Internal Signatory, External Signatory	2/1/2022 3:16:49 PM	<a href="#">Show Changes</a>	

# Versions and History

- Notice that using ‘Show Changes’ link, system displays the Old Value and New Value of the metadata changes.

Icertis

Agreements

Requests

Agreements / MSA\_Supriya (ICMMasterServicesAgreement)

Draft

Menu

Dashboard

Summary

Details

Versions

History

History

All

Draft

Approval

Refine Search Here...

EVENT

Agreement Modified

Agreement Downloaded

Details

ATTRIBUTE NAME	OLD VALUE	NEW VALUE
File Path	default:\agreements\ICMMasterServicesAgreement_8e607210-88b4-495d-b0e5-27ec3ef7d4c0_1.Docx	default:\agreements\ICMMasterServicesAgreement_07210-88b4-495d-b0e5-27ec3ef7d4c0_2.Docx
Effective Date	1/10/2022	1/17/2022
Expiry Date	7/10/2022	7/17/2022

# Action buttons

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

CANCEL

...



Click the **Edit** button to make metadata changes to the contract document.

## Edit Agreement

Master Services Agreement / MSA\_Supriya (ICMMasterServicesAgreement\_6)

### Attributes (Step 1 of 3)

ORGANIZATION UNIT

/icertis



#### 1. General Information

AGREEMENT CODE ?

ICMMASTERSERVICESAGREEMENT\_6

CONTRACT NAME ?

MSA\_Supriya

\* LEGAL ENTITY NAME

Icertis

\* LEGAL ENTITY ADDRESS

Pune

DEPARTMENT

Engineering

DEPARTMENT HEAD

Finance Manager;



IS CONFIDENTIALITY CLAUSE REQUIRED

No

PREVIOUS

NEXT

DISCARD

# Versions

- If a contract is modified/ updated, the system creates a new version of the document
- The previous version of the document is maintained in the system.
- The system always downloads the latest version of the agreement. Access to the older versions is possible through Versions.

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

CANCEL

...

Menu

Dashboard

Summary

Details

Versions

History

Associations

Versions

Refine Search Here...

CLEAR GRID FILTERS

VERSION	USER NAME	USER ROLE	USER EMAIL	DATE AND TIME	NOTE	DETAILS
2	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	1/7/2022 8:05:51 AM		<div></div> <div></div>
1	Supriya Ashtikar	Primary Owner, Ext...	supriya.ashtikar@icertis...	1/6/2022 5:11:16 PM		<div></div> <div></div>

8

Items Per Page

1 to 2 of 2 items

<<

<

1

>

>>

# Action buttons

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

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

Menu

- Dashboard
- Summary
- Details
- Versions
- History
- Associations
- All Associations
- Communications 0 +
- Statement of Work 0 +
- Document List
- Deviations 0
- Amendments 0

Summary

CREATED BY  
Supriya Ashtikar

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgre

2. Vendor Information

VENDOR NAME  
Acme Corporation

3. Contract Term

EXPIRY DATE  
7/17/2022

4. Signatory Information

**Download:** The word version of the document can be downloaded using the Download button. Once downloaded, the contract's clause text and metadata can be modified. This allows users to work on their contract documents in offline mode.

**Upload Document:** The contract can be modified and uploaded back to the system using the Upload Document button. The system prepares another version of the contract document.

**Note-** Files uploaded to the Icertis contracting platform can be scanned for threats using the OPSWAT virus scan engine. This is an add-on feature and needs to be procured and configured



# Icertis Word Add-in

**MASTER SERVICES AGREEMENT**

This Master Services Agreement (this "Agreement") is made effective as of ICMEffectiveDate (the "Effective Date").

BETWEEN:

ICMLegalEntityName, ICMLegalEntityAddress

AND

ICMVendorName, ICMVendorAddress, ICMVendorName

1. **Term**

This Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination ICMExpiryDate (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

**Icertis experience for word is a new add-in providing you the benefits of the Icertis Contract Intelligence tool within Microsoft Word.**

**trainingdev1 - Icertis Experi..**

**Icertis**

**Edit Template**

**Details**

Select Contract Type \*

Master Services Agreement

Name \*

MSA Template\_1

Description

Demo template created for testing

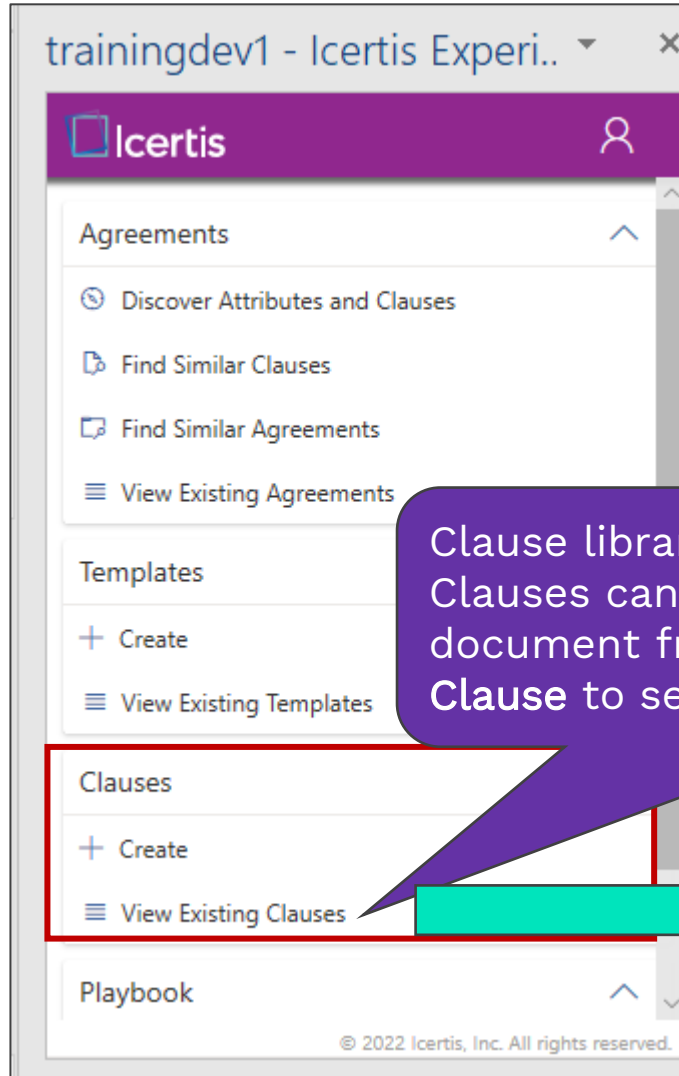
Version Comments

1

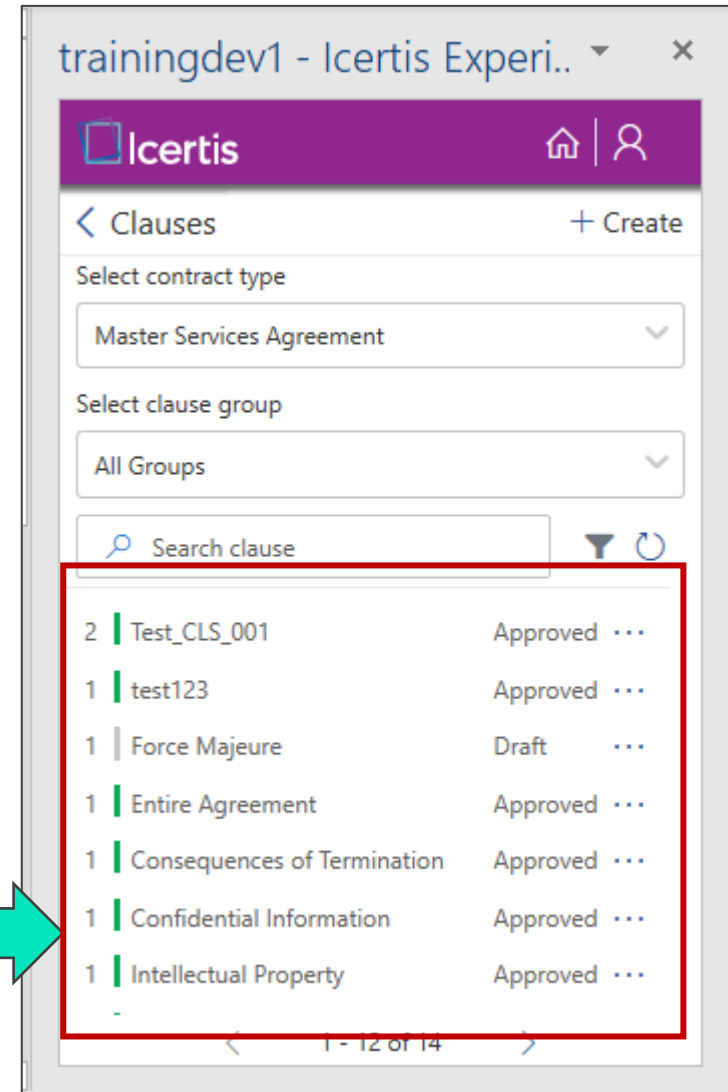
Effective From \* Effective To

Send For Approval Save

# View Clause Library



Clause library provides a list of clauses. Clauses can be inserted to the agreement document from the library. Click **View Clause** to see the clause library



# View Clause Library

This Master Services Agreement (this "Agreement") is made effective as of 12/20/2021 (the "Effective Date").

BETWEEN:

Icertis India , Pune (the "Company")

AND

Indus Ltd. , 120 Karve Road , India (the "Supplier")

**1. Services and Deliverables**

1.1. Organization 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 is not provided, the Supplier shall provide the Services on the express and essential terms of the Agreement. The Supplier shall be deemed to represent and warrant that it is (i) able and willing to perform the Services, (ii) not in breach of any contract or other legal obligation, and (iii) not providing the Services to any other party. The Supplier, for any reason, shall not be permitted to subcontract the Services. The Supplier shall immediately notify the Company in writing of any change in the Supplier's ability to perform the Services hereunder. Notwithstanding the foregoing, the Supplier may replace the Representative with another individual reasonably satisfactory to Company with the prior written consent of Company.

trainingdev1 - Icertis Experi..

Icertis

< Insert To Template

Clauses

Search

Show Tagged Clause Only

Entire Agreement	1	×	+	...
Governing Law				
Intellectual Property	1	×	+	...
Preamble	1	×	+	...
Signature Block	1	×	+	...
Term	1	×	+	...
Termination	1	×	+	...
Test_CLS_001				
3. None				

A clause can be removed from the agreement or added from the clause library using the delete "x" or plus "+" button. Once the changes are made, click **Save** to update the document within the ICI platform

# Document Comparison

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

SEND FOR APPROVAL

...

Menu

Dashboard

Summary

Details

Versions

History

Associations

All Associations

Communications0+

Statement of Work0+

Document List

Deviations1

Amendments0

Commitments0

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_6

2. Vendor Information

VENDOR NAME  
Acme Corporation

3. Contract Term

EXPIRY DATE  
7/17/2022

EFFECTIVE DATE  
1/17/2022

4. Signatory Information

SIGNATURE TYPE  
EXTERNAL SIGNATORY

Cancel

Smart Links

Lock

Download All

Confidential

Compare Documents

Collaborate

Broadcast

Agreement Deviation Report

Compare Clause Changes

Assemble Contract

Request Review

On Hold

Delete

Copy Record

The system also provides a Document Comparison feature that allows you to compare the two versions of the document.

# Redline version of Document

The screenshot displays the Icertis document management system. The main document view on the left shows a 'Summary' section for 'MSA\_Supriya (ICMMasterServicesAgreement\_6)' with a 'Draft' status. It lists the creator as 'Supriya Ashtikar' and the creation date as '1/6/2022'. A purple callout box explains that the redlined version is available when the user clicks on 'Compare' and that the comparison can be downloaded using the 'Download Comparison' action. The right-hand panel, titled 'Compare Document Versions', shows a comparison between 'Version 2' (Original Version) and 'Version 3' (Revised Version). The 'COMPARE' button is highlighted with a red box. Below the buttons, a preview of the document content is shown, with red lines indicating changes. The document content includes sections for 'Term', 'Fees', and 'Termination'. The 'Term' section (2.1) states that the agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). It also mentions that any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number, with the text 'Term is added' highlighted in red. The 'Fees' section (3.1) states that for and in consideration of the Services and Deliverables furnished by the Supplier to Company under this Agreement, the Supplier shall receive fees set out in the Statement of Work. The 'Termination' section (4) is partially visible at the bottom.

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

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

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT

The redlined version of the document is available when the user clicks on Compare  
This comparison can be downloaded using action Download Comparison  
In the downloaded file, changes are visible in Microsoft Word format

Compare Document Versions

ORIGINAL VERSION Version 2  
Created by Supriya Ashtikar (1/7/2022 8:05:51 AM)

REVISED VERSION Version 3  
Created by Supriya Ashtikar (1/7/2022 5:05:46 PM)

COMPARE DOWNLOAD COMPARISON

To see full document [click here](#)

1 of 3

with another individual reasonably satisfactory to Company with the prior written consent of Company.

2. Term

2.1. This Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number. **Term is added.**

3. Fees

3.1. For and in consideration of the Services and Deliverables furnished by the Supplier to Company under this Agreement, the Supplier shall receive fees set out in the Statement of Work. Although the fees set out in the Statement of Work may not set out the

relevant sales, goods and services, excise, value added or similar taxes, whether of federal or other jurisdictional level, taxes should be charged to Company in the normal course, and suppliers may be subject to withholding tax under US law. All taxes shall be shown separately on each invoice. Invoices shall be submitted to the attention of Accounts Payable as set out in the Statement of Work.

4. Termination

4. Signatory Information

SIGNATURE TYPE  
Electronic Signature

EXTERNAL SIGNATORY  
Supriya Ashtikar

# Downloading the Document Comparison

- Shows the clause in highlighted text in red

ICMMasterServicesAgreement\_8e607210-88b4-495d-b0e5-27ec3ef7d4c0\_3 - Word

Design Layout References Mailings Review View ICI Help

2. **Term**

2.1. This Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number **. Term is added.**

3. **Fees**

3.1. For and in consideration of the Services and Deliverables furnished by the Supplier to Company under this Agreement, the Supplier shall receive fees set out in the Statement of Work. Although the fees set out in the Statement of Work may not set out the

# Compare Clause Changes

Home

Agreements

Requests

Associations

Compliances

Templates

Clauses

Configure

Reports

Bulk Actions

Admin

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

Summary

1/6/2022

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_6

CONTRACT NAME  
MSA\_Supriya

Preview

This Master Services Agreement (the "Agreement") is entered into this 1st day of January, 2022, by and between:  
**BETWEEN:**  
Icertis, Pune (the "Company")  
AND  
Acme Corporation, 14711  
  
1. **Services and Delivery**  
1.1. Company hereby agrees to supply the work

Send For Approval

Cancel

Smart Links

Lock

Download All

Confidential

Compare Documents

Collaborate

Broadcast

Agreement Deviation Report

Compare Clause Changes

Assemble Contract

Request Review

On Hold

Delete

Copy Record

The clause comparison report allows to compare clauses with previous document version

# Compare Clause Changes

Home

Agreements

Requests

Agreements

MSA\_Supriya (ICMM)

Draft

Summary

CREATED BY  
Supriya Ashtikar

CREATED ON  
1/6/2022

ORGANIZATION UNIT  
/icertis

1. General Information

AGREEMENT CODE  
ICMMasterServicesAgreement\_

CONTRACT NAME

Compare/Update

PREVIOUS TEXT

TermThis Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

Fees  
Clause Insights

Termination  
Clause Insights

Click this button to get more insights about clause changes.

TermThis Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number. Term is added.

Last modified by **Supriya Ashtikar**  
No Change

Last modified by **Supriya Ashtikar**  
No Change



# Compare Clause Changes

Compare/Update Clauses

PREVIOUS TEXT

Term

Clause Insights

TermThis Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

Fees

Clause Insights

FeesFor and in consideration of the Services and Deliverables furnished by the Supplier to Company under this Agreement, the Supplier shall receive fees set out in the Statement of Work. Although the fees set out in the Statement of Work may not set out the relevant sales, goods and services, excise, value added or similar taxes, whether of federal or other jurisdictional level, taxes should be charged to Company in

Deviation Insights

Term (Clause\_5)

Used in agreements

Agreement cycle time

did not change

(0 of total 0)

where clause is present

(0 of total 0)

Know More...

In Contract Type: Master Services Agreement

Used in agreements

Agreement cycle time

did not change

(0 of total 0)

where clause is present

(0 of total 0)

Know More...

Organization Unit: ICERTIS

Used in agreements

Agreement cycle time

did not change

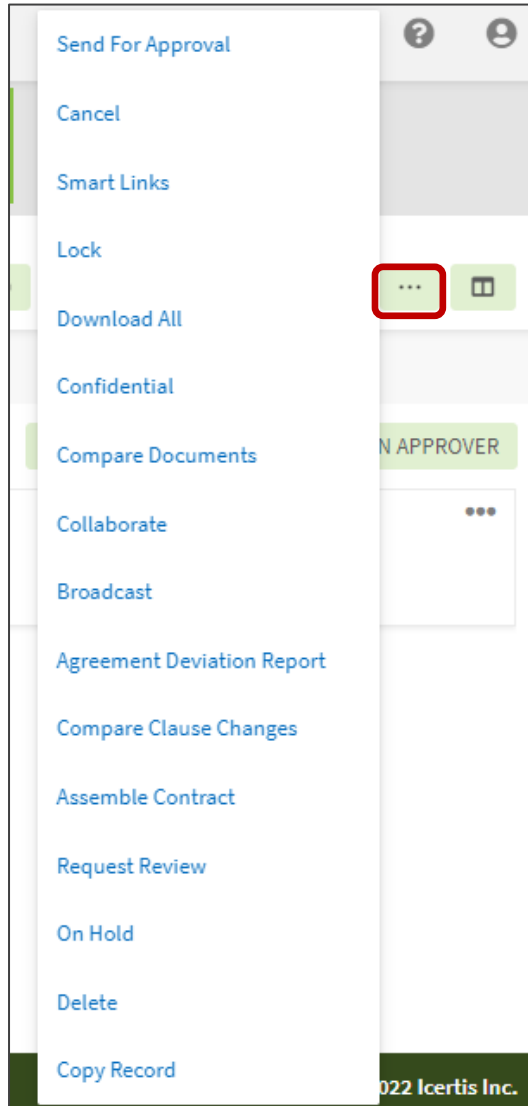
(0 of total 0)

where clause is present

(0 of total 0)

Know More...

# Agreement Deviation Report



When the standard clause gets modified the system generates a Deviation

Deviation Reports considers only for clause modifications and not attributes modification.

## Deviation Report

STANDARD/APPROVED CLAUSE TEXT

DEVIATED CLAUSE TEXT

 Term

Deviated By Supriya Ashtikar

• Requires Approval

TermThis Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number.

TermThis Agreement is effective as of the Effective Date and, unless earlier terminated pursuant to the Termination clause, shall continue until the termination 7/17/2022 (the "Term"). This Agreement shall not be renewed by its own terms, and any further rendition of services by the Supplier beyond the Term of the Agreement shall require the execution of a new Agreement with a new purchase order number. . Term is added .

The clause modification may require approval from relevant departments.

# Notes

Agreements / MSA\_Supriya (ICMMasterServicesAgreement\_6)

Draft

OPEN IN OFFICE FOR THE WEB

DOWNLOAD

UPLOAD DOCUMENT

EDIT

...

Menu

Document List

Deviations 1

Amendments 0

Commitments 0

Agreement Clauses

Team

Clause Approver 0

**Notes 1**

Notes

All Workflow

Refine Search Here...

EVENT	USER NAME	NOTE	DATE AND TIME	ROLE	USER EMAIL	REASON COI
Document Uploaded	Supriya Ashtikar	checked in.	1/7/2022 5:05:47 PM	Primary Owner, External...	supriya.ashtikar@icertis...	

8 Items Per Page

1 to 1 of 1 items

ADD NOTE

CLEAR GRID FILTERS

Add new option lets users to enter the notes using note UI

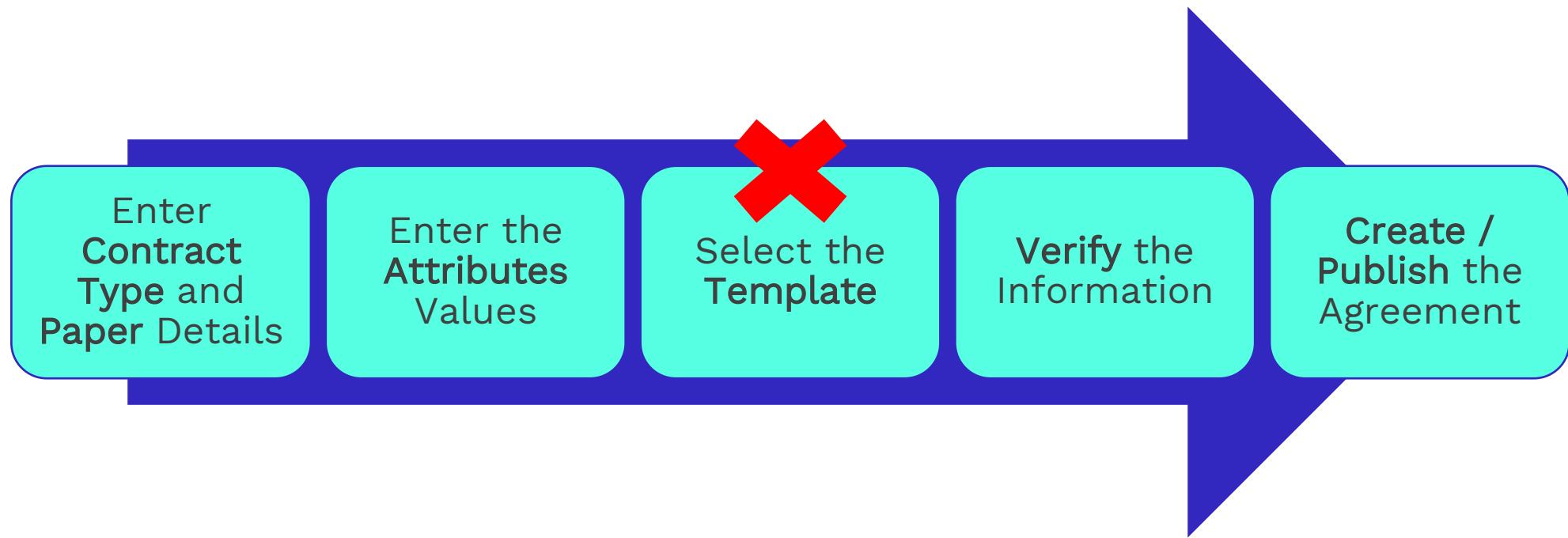
Team members working on the agreement team can add comments or notes for others to read.

Essential contract information can be captured via the **notes** section

### **3. Create Agreements using third party paper**

## Authoring Contract Steps

- You initiate creation of an Agreement by clicking **Create Agreement** under the **Agreement Management** tile
- Agreements created using the third-party paper would not include the Select Template step



# Summary

## Drafting and Editing Contract

- Contract creation steps - Contract Type selection, Attributes, Template Selection, Verification
- Create , Create and Publish, Create and Send for Approval
- Modifying agreements – Only attributes using Edit
- Modifying agreements – Download , Modify and Upload Document
- Teams display agreement stakeholders and progress of the contract lifecycle
- The chevron view enables to view the agreement journey upfront
- Notes display comments by stakeholders
- Document Comparison Report and Agreement Deviation Report



Link needs to be checked and updated

## Exercise- Log in to ICI

- Connect to the Icertis Contract Intelligence using the link <https://training.icertis.com>
- Username- *Your email address*
- Password- *Welcome@123*





# Thank You