

Contracts Table


The Contracts table holds all contract records. It also controls the associated automation and notifications related to contracts. Part of a representative record is shown below.

Contract


Save
Cancel
Details
Attachments
Approvals
Emails
Renewal / Related Contracts
Signature
Tasks
History

«»
🖨️
🔍


Collapse All




Draft




Pending Contract Manager




Pending Approval




Approved




Pending Signature



Signed



Active



Canceled

ID	145		
*Record Type	Contract	Parent Contract ID	<input type="text"/>
*Internal Contract Owner	Helen Jensen	Assigned Team	Contract Management Team
*Contract Type	Non-Disclosure Agreement	Status	Pending Approval

Cancel Contract

Requester Information

Requester Name	Helen Jensen	Requester Phone	555-333-1111	Ext.	<input type="text"/>
Requester Email	example32@example.com	Requester Manager	Robert Barash		
For Department	Sales	Department Head	Karen Sneller		

Contract Information

Renewal Type	Notify staff to renew	*Days in advance to notify for renewal	60
*Contract Title	NDA for Acme Micro		
*Contract Description	NDA for Acme Micro		
*Contract Start Date	Jan 28 2019	*Contract End Date	Jan 28 2020
Fiscal Year	FY 2018-19		

Required fields, marked with a red asterisk, include: Record Type, Internal Contract Owner, Contract Type, Days in Advance to Notify for Renewal, Contract Title, Contract Description, Contract Start Date, and Contract End Date.

Power User Use Case

This section covers the use case for power users. Each record in the table holds information about an individual contract including details about the contracting party, approval information, attached contract file and supporting documents, and renewal details.

Create Contracts

Contract records may be created by members of the Admin, Contract Creator, Contract Manager, and Contract Owner groups. Contracts may be created in one of two ways:

- Click New in the Contract table action bar
- Use the Create Related Contract button on the Renewal / Related Contracts tab to create a renewal, subcontract, or amendment from the current contract. This button is available only if the contract is in a Status of Signed, Active, Expired, or Canceled. Creating a new contract with the Create Related Contract button will automatically link it to the current contract by populating the Parent Contract ID field in the newly created record. For a more detailed explanation of creation by this method, see the Handling Related Contracts and Renewals section.

By default, contracts fall into one of four categories:

- Contracts
- Master Agreements
- Subcontracts
- Amendments

The Record Type field in the common area indicates the contract's category. "Contract" is the default Record Type for newly created contracts. It can be used to indicate either a stand-alone contract or a contract that exists under a master agreement. In the latter case, the Parent Contract ID can be filled in upon creation of the contract. Subcontracts and Amendments will be linked to a parent contract automatically, if they are created by clicking the Create Related Contract button in the parent contract record.

Contract

Save Cancel Details Attachments Approvals Emails Renewal / Related Contracts Signature Tasks History

Collapse All

Draft **Pending Contract Manager** Pending Approval Approved Pending Signature Signed Active Canceled

ID 42

*Record Type Amendment *Parent Contract ID 41

*Internal Contract Owner Jared Smith Assigned Team Contract Management Team

*Contract Type Vendor Subscription Service Status Pending Contract Manager

Below the Record Type are fields storing the Assigned Team and the Internal Contract Owner. The default Assigned Team is the Contract Manager Team. The Internal Contract Owner is the person responsible for overseeing the contract and ensuring timely renewals and approvals. The list of available owners is filtered to users who are in the Contract Owner Team or the Contract Manager Team. The default Internal Contract Owner is the user who creates the contract record, provided that user is in the Contract Manager or Contract Owner Team. Users in the Contract Manager or Admin group can manually change the Assigned Team and Internal Contract Owner if needed.

Once the appropriate fields are filled in, the contract may be saved in a Status of Draft.

The contract's Status field is changed automatically by the system at appropriate points in the workflow, generally when an action button is pressed or when some condition is met; however, users in the Admin group can manually override the Status if necessary.

Information about the contract requester, external company involved, and locations related to the contract may be added by clicking the lookup icon next to those fields. If a desired Requester, Company, or Location does not exist, a record must first be created in order to link it to the Contract.

Creating companies and contacts during contract creation

In the Contract Party Information section, users can find and link to an existing company, or create new ones as needed. To find an existing company record, use the lookup icon to search for the company. If the contract party isn't found, power users can add a new company by selecting New Company. Enter the name and address information, then click Create Company.

Contract Party Information

Contract Party Entry Existing Company New Company

Be sure to click this button, after confirming that this company does not already exist with a different spelling. Otherwise, the contract will not be linked to a contract party.

[Create Company](#)

*Company Name New Company Limited *Primary Role Vendor ▼

*Street Address 123 Main Street Street Address 2 _____

*City Anywhere *Country USA ▼

*Zip or Postal Code 94066 *State UT ▼

Both company and location records are created in the background, and linked to the new contract when the record refreshes.

Contract Party Information

Contract Party Entry Existing Company New Company

Company Name **New Company Limited** 🔍

Location Name New Company Limited-Anywhere ▼

Street Address **123 Main Street**

City **Anywhere**

Country **USA**

Zip or Postal Code **94066**

Similarly, you can create new entries in the people table if the main contact for the contract party is not an existing contact. Select New Contact, enter the information, and click Create Main Contact. Multiple contacts can be created in this way, and then the primary contact can be selected from the Main Contact drop-down.

Party Main Contact

Company Contact Entry Existing Contact New Contact

Be sure to click this button if a new contact has been input.

[Create Main Contact](#)

*First Name Richard *Last Name James

*Email rjames@example.com Phone 414-444-5555 Ext. _____

When contract requesters submit a new contract through the end user interface, they can enter new company and contact information, but they don't see the buttons to create new records. When a contract is submitted for review, Contract Managers can edit the contract party information, or click the button to confirm the new company or contact and finish adding records.

This setup is intended to prevent end users from creating duplicate companies with slightly different spellings and to ensure that contract managers have ownership and control of this data. Permissions can be changed easily to allow end users to use the buttons to create companies and contacts directly. Note that it is important for the contract managers to evaluate the new additions and either replace with existing data or click the buttons to create the appropriate background data. Otherwise, the linked data can't be used in print templates and emails.

Creating contract attachments from default print templates

The Attachments tab shows all attached files related to the contract and provides the user with options to create and edit related attachments. For certain contract types, when the Document Source is set to Standard Template or Modified Template, the Print Template to Generate field appears. The Document Source can be set to:

- Standard Template, for a file generated from an internal template. This option appears only for contract types where Has Print Template(s) is set to Yes.
- Modified Template, for a file originally generated from a template but then modified. This option appears only for contract types where Has Print Template(s) is set to Yes.
- 3rd Party, to indicate a document provided by the external contract party
- Internal - Other, for a document that has been internally generated but not from a template

The Print Template to Generate has a default value set based on the contract type, and there may be some visibility dependent fields that appear based on whether the print template uses any user-selected or optional clauses. For instance, the Customer Service Contract default template has some additional fields such as Governing Law Clause and some Optional Clauses that are selectable by the user:

Document Source and Generation

To add a contract that was provided by a third party or that was generated internally but not from a template, click **New** in the action bar of the Attachments table below.

Document Source: Standard Template ▼

Select Governing Law Clause: Governing Law - New York ▼

Governing Law Text: **Governing Law.** This agreement and any dispute arising out of it, shall be governed by laws of the State of New York.

Consent to jurisdiction. Each party hereby irrevocably consents to the exclusive jurisdiction and venue of any federal court located within Kings County, New York, in connection with any matter arising out of this agreement.

Select optional clauses to be added to the end of the contract document.

Select Optional Clauses:

- Jury Duty requirement
- Insurance Requirement - under \$100K
- Insurance Requirement - over \$100K purchase
- Termination Provisions - mutual early termination

Print Template to Generate: Hosted Service Level Agreement Docusign Tags ▼

Print Template File: al-hosted-service-level-agmt-docusign-clauses.docx

[Create and Attach](#)

The Create and Attach action button is used to auto-generate a contract document from the MS Word print template specified in the Print Template to Generate field and stored in the Print Template File field. Clicking Create and Attach generates the document and creates an attachment record to hold the attached file. It also increments the Version Number field.

If the Contract Party Information section is not properly filled out and linked to records, a validation action warns the user to finish creating new records before generating the attachment.

Creating contracts and attachments from inbound emails

Attachments can be automatically generated from inbound emails containing attached files. Files from inbound emails are mapped to the Transitional Contract Files field in the contract, assigned a predetermined Attachment Title and Attachment Type value of Document Provided by Outside Party, and then converted into a new attachment record. The file is mapped into the Attached File field in the attachment record. If multiple files are attached to an inbound email, each one is converted into a separate attachment record for that contract.

The screenshot displays the 'Document Source and Generation' section of a software interface. It includes a 'Document Source' dropdown set to 'Standard Template', a 'Print Template to Generate' dropdown set to 'NDA Numbered Normal Style', and a 'Print Template File' link pointing to 'nda-normalwithnumbering.docx'. A 'Create and Attach' button is visible. Below this is the 'All Contract Attachments' table, which shows 1 record found. The table has columns for 'Edit', 'ID', 'Attachment Type', 'Title', 'Attached File', 'Include in Approval Packet', 'To Be eSigned', and 'Status'. The single record shown is 'Generated Agreement from Template' with ID '9', title 'Generated Draft Contract', and file name 'Contract ID 145 - al-non-disclosure-agreement.docx - Document Version 1.docx'. The 'Include in Approval Packet' field is set to 'Yes', 'To Be eSigned' is 'No', and 'Status' is 'Active'.

<input type="checkbox"/>	Edit	ID ↓	Attachment Type	Title	Attached File	Include in Approval Packet	To Be eSigned	Status
<input type="checkbox"/>		9	Generated Agreement from Template	Generated Draft Contract	Contract ID 145 - al-non-disclosure-agreement.docx - Document Version 1.docx	Yes	No	Active

Working with Attachments

The All Contract Attachments related table is also used to manually create and attach files to the contract, such as supporting documents, signed agreements, or other documents from the contract parties. Create attachments from within the contract record by clicking New on the related table's action bar.

The Select Files drop-down on the action bar is used to operate on multiple selected attachments to update the fields to the far right in the table view. Add or Remove for the Approval Packet sets the Include in Approval Packet field to Yes or No. Add or Remove for the E-sign Packet changes the To Be eSigned field to yes or no. And Set Status to Superseded sets the status for the selected attachment(s) to Superseded.

All Contract Attachments

Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.

<input type="checkbox"/> Edit	Title	Attached File	Include in Approval Packet	To Be eSigned	Status
<input type="checkbox"/>	Generated Draft Contract	Contract ID 145 - al-non-disclosure-agreement.docx - Document Version 1.docx	Yes	No	Active

Tracking company documents and insurance certificates

The Attachments tab also holds related tables of company documents and insurance certificates. The Create New Company Document button opens a new company document record linked to this contract.

Company Documents

Status: 1 record(s) found, 1 page(s). Click [here](#) to count records again..

<input type="checkbox"/> Edit	ID	Type of Document	Period Covered Start Date	Period Covered End Date	Company Contact	Date Created	Upload File
<input type="checkbox"/>	12	W-9			Sam Smith	Dec 05 2018 14:23	w9-updated.pdf

For more information on company documents, see the [Company Documents Table](#) section.

Insurance certificates can be found directly in the Insurance Certificates table, and in related tables in the Company, Contracts, and Company Documents tables.

▼ Insurance Certificates

Status: 13 record(s) found, 1 page(s). [Click here](#) to count records again..

Mass Edit | Unlink Views ▼

<input type="checkbox"/>	Edit	ID ↓	Type of Certificate	Company Name	Status	Expiration Date
<input type="checkbox"/>		60	General Liability	IBM	Valid	May 31 2019
<input type="checkbox"/>		59	Auto	IBM	Valid	Dec 31 2018
<input type="checkbox"/>		58	Employer's Liability	IBM	Valid	Dec 15 2019
<input type="checkbox"/>		56	General Liability	IBM	Valid	Jul 01 2019
<input type="checkbox"/>		55	Auto	IBM	Valid	Dec 31 2018
<input type="checkbox"/>		54	Worker's Comp	IBM	Valid	Dec 31 2018
<input type="checkbox"/>		53	Employer's Liability	IBM	Replaced	Dec 31 2018
<input type="checkbox"/>		52	Auto	IBM	Valid	Dec 31 2018
<input type="checkbox"/>		51	Professional Liability	IBM	Valid	Dec 04 2019
<input type="checkbox"/>		50	General Liability	IBM	Valid	Dec 04 2019
<input type="checkbox"/>		49	Auto	IBM	Valid	Dec 04 2019
<input type="checkbox"/>		6	General Liability	IBM	Replaced	Oct 15 2017
<input type="checkbox"/>		5	Excess Liability	IBM	Valid	Feb 01 2019

When you add an insurance certificate to a company record, it can be automatically linked to all pending or active contracts with that vendor by a daily time-based rule (disabled by default).

The Insurance Certificate Owner (defined in the company record) is notified fourteen days before an insurance certificate's Expiration Date. When a certificate expires without being renewed, the Contract Managers of any related active contracts are notified on the date of the expiration.

For more information about insurance certificates and related automation, see the Insurance Certificates Table section.

Another method for managing insurance certificates

You may prefer to manage insurance certificates as contract attachments, instead of using the Insurance Certificates table. For example, if Contract Managers are responsible for renewing and maintaining insurance certificates, it may be best to use the Attachments table to hold the certificates, along with all other types of attached documents for contracts. Managing insurance certificates as contract attachments means the Contract Manager will receive email notifications instead of the Internal Certificate Owner.

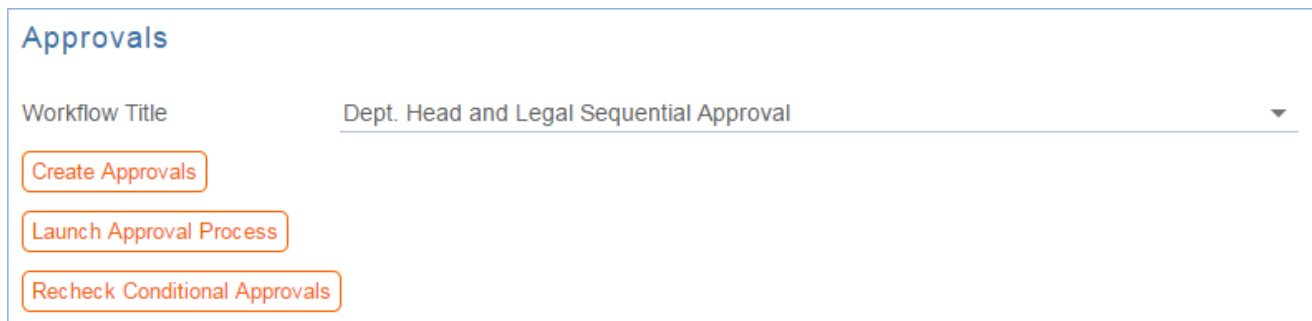
If this method makes the most sense for your particular business, you can remove the default Insurance Certificates field from the contract layout. Then go to the Attachment Type table and edit the record called Insurance Certificate. By default, this record's Status is Inactive; change the Status to Active to make it visible in the Attachments table.

Handling Approvals

Approvals for a contract are handled on the Approval tab. The order and nature of approvals depends on the Workflow selected on the Approvals tab. Selecting a Contract Type in the common area filters the available Workflow Title choices. For information on setting up the individual Workflows, refer to the Approval Workflows section.

The order and nature of approvals depends on the Workflow Title selected on the Approvals tab. Selecting a Contract Type in the common area filters the available Workflow Title choices. For information on setting up the individual Workflows, refer to the Approvals Table section.

To submit a contract for approval, first select the correct Workflow Title from the drop-down provided. Click Create Approvals to generate a set of Approval records in a Status of Queued. Once the records have been created, click Launch Approval Process to update the Status of the contract to Pending Approval and update the Status of the approval(s) with the lowest step number to Pending Approval. There may be more than one approval in the lowest step number for parallel approvals.



The screenshot shows a user interface for the 'Approvals' tab. At the top left, the word 'Approvals' is displayed in a blue font. Below it, there is a label 'Workflow Title' followed by a dropdown menu. The dropdown menu is currently open, showing the selected option 'Dept. Head and Legal Sequential Approval' with a small downward arrow on the right. Below the dropdown, there are three orange buttons with rounded corners and black text: 'Create Approvals', 'Launch Approval Process', and 'Recheck Conditional Approvals'.

The system automatically notifies the first approver in the sequence. To advance the contract workflow, an approver will use one of three action buttons to change the Status of the approval record:

- **Approve** to send the contract to the next approver in the sequence.
- **Require Changes** to send the contract back to the contract manager to make changes.
- **Permanently Reject** if the contract requires significant changes.

Approval

Save ▾
Cancel ▾
Details
Related Approvals
Emails
History
⏪ ⏩

ID	354	Status	Pending Approval ▾
Approval Title	Maintenance contract for desktop computers with Acme Micro - Department Head Approval		
	Approve	Require Changes	
	Permanently Reject		

Approval Details

*Step Number	1	Related To	Contracts ▾
*Approval Team	Contract Management Team ▾	Approver	Robert Barash ▾

Both Require Changes and Permanently Reject require the user to enter notes in the Approval Notes field. These notes are appended to the Approval Notes field in the contract record and are also viewable from any other approval record linked to that contract.

As each approval is approved, the system notifies the next approver in the sequence that a contract is pending their approval. A list of all approval records is displayed under the Approvals Needed section and automatically updated as approval records are modified.

If a user who is not on the current approval team attempts to approve a contract, the system recognizes the error and prevents the user from completing the approval action. When all the required approvals are received by the system, the contract Status is automatically changed to Approved.

Adding notes and sending emails

Notes relevant to the general contract process are entered into the General Notes field on the Details tab, and notes pertaining to the approval process are entered into the Approval Notes field on the Approvals tab.

All Notes by Approvers

Approval Notes	<p style="margin: 0;">[Agiloft System May 01 2017 17:55]</p> <p style="margin: 0;"> This looks like we need to update the liability section and reduce our liability.</p> <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>
----------------	---

Emails can be sent to Internal Contacts and External Party Contacts from the Emails tab. First choose the type of Recipient(s) (Internal Contacts, External Party Contacts, or External Party and Internal Contacts), then click the lookup icon to select the contacts to email. Fill out the Email Subject and Email Text fields as needed, select any files to send with the email, then click Send Email. The emails sent from the contract will be shown below in the Email Communication History.

Send Email

Recipient(s) Internal Contacts ▼
Click the magnifying glass to search for internal contacts to cc.

Internal Contact(s) to Email • Helen Jensen ▲▼ 🔍

Add email addresses separated by comma or semi-colon to cc people on the outbound email.
Emails to CC _____

Email Subject Update for your contract

Email Text Attached is the latest draft of this contract for your review.

Select any files that you want to send with the email. Only active attachments will be available
Files to Send with Email Acme Micro SLA 178 May 01 2017.docx ▲▼

Related Contracts and Renewals


Information about the renewal process is stored on the Renewal / Related Contracts tab. Fields for capturing the Renewal Notification Date and Days in Advance to Notify for Renewal are provided as a default. If relevant, information about the renewal contract or previous contract are automatically updated by the system. The Create Renewal Contract button is used to create a renewal contract. This will link the new contract to the previous one.

This button is only visible when the contract's Status is Active, Canceled, Expired, or Signed. A new contract generated in this way can be edited before saving.

If applicable, the system automatically links renewal contracts to any preceding contracts, creating a chain for auditability. Users typically do not enter information into the Renewal Contract and Previous Contract Information fields manually.

This tab is also used to create an amendment or subcontract of an existing contract. Select the type of record you wish to create, then click the Create Related Contract button. The new record will be linked to the current contract in a child relationship.


Renewal Information

Renewal Notification Date Mar 15 2017  Create Renewal Contract


Generate a Related Contract Record




Amendment Create Related Contract

Related Contracts and Amendments

Diagram 

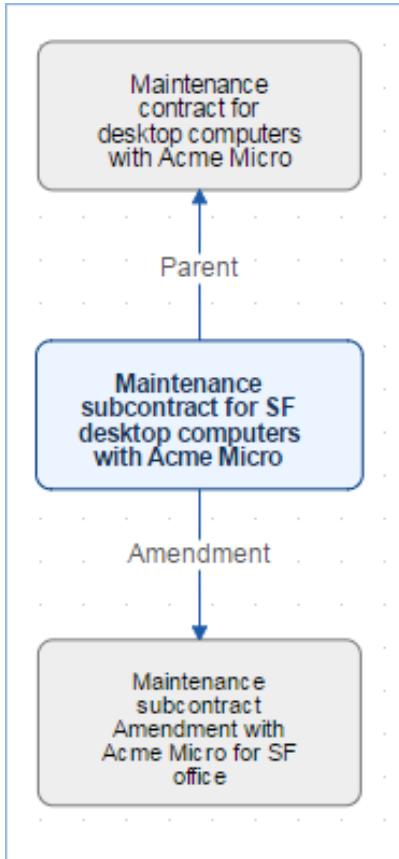
Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.

Save Changes Cancel Changes Views 

<input type="checkbox"/> Edit	ID ↓	Contract Title	Record Type	Company Name	Status 	Internal Contract Owner 	Contract Amount	Contract End Date	Latest Attachment
<input type="checkbox"/> 	178	Maintenance subcontract Amendment with Acme Micro for SF office	Amendment	Acme Micro	Pending Approval	Agiloft System	\$2,000	Jul 01 2017	Acme Micro SLA 178 May 01...

The Diagram icon is used to generate a diagram of any contracts related to this contract.

For example, the diagram for a subcontract of a master agreement, with its own amendment, is shown here:



Any direct children of the current contract are shown in the table in the Related Contracts and Amendments section.

Signing contracts with DocuSign or Adobe Sign

A Signature tab appears to the right of the Renewal / Related Contracts tab. This tab contains fields for contract document signers, and contains all fields related to DocuSign and Adobe Sign. If you are not using either system, these fields can simply be removed from the layout. The Files to Sign field holds attached files from the Attachments table that have a To Be eSigned value of Yes. The Refresh Files action button refreshes this field in case changes to the attachments were made in the same session under the contract's Attachments tab.

ESignature Files

Files to Sign Acme Micro-SLA-43.docx Refresh Files

Signers

Internal Signer Helen Jensen 	Internal Signer Email example32@example.com
Internal Signer Title Legal Assistant 	Internal Signer ID 431
1st Party Signer Name Maurice Sendak 	1st Party Signer Email
1st Party Signer Title Engineer 	1st Party Signer ID 437
2nd Party Signer Name <input type="text"/> 	2nd Party Signer Email <input type="text"/>
2nd Party Signer Title <input type="text"/> 	2nd Party Signer ID <input type="text"/>

Fields under the Signers heading are used to populate the signature page of the contract's print templates and to identify the signers for either esignature program.

Before using either DocuSign or Adobe Sign, you will need to configure the integration by going to **Setup > Integration** and choosing the appropriate platform. For DocuSign, you must sign up for a DocuSign account directly with DocuSign. For Adobe Sign, Agiloft can set up the account and allow you to purchase envelopes directly without any long term contract. See the sections on DocuSign and Adobe Sign below for more details.

Using DocuSign

Once the contract is ready to sign, use the Create DocuSign Envelope action button to create a DocuSign Envelope record and attach the files held in the Files to Sign field.

v DocuSign Envelopes

Create DocuSign Envelope

This will also create a DocuSign Recipient record for each signer. These records are then shown in the related tables for DocuSign Envelopes and DocuSign Recipients on the Signature tab. Only users in the Admin and DocuSign Users groups can access the DocuSign fields on the Signature tab. For more information on DocuSign, refer to the detailed DocuSign User Manual at <http://www.agiloft.com/documentation/docuSign-users-manual.pdf>.

Using Adobe Sign

Once ready to send for signature, click the Create Adobe Sign Envelope button.

▼ Adobe Sign Envelopes

Create Adobe Sign Envelope

This will create an Adobe Sign Envelope and convert the signers into recipients.

Contract Processing

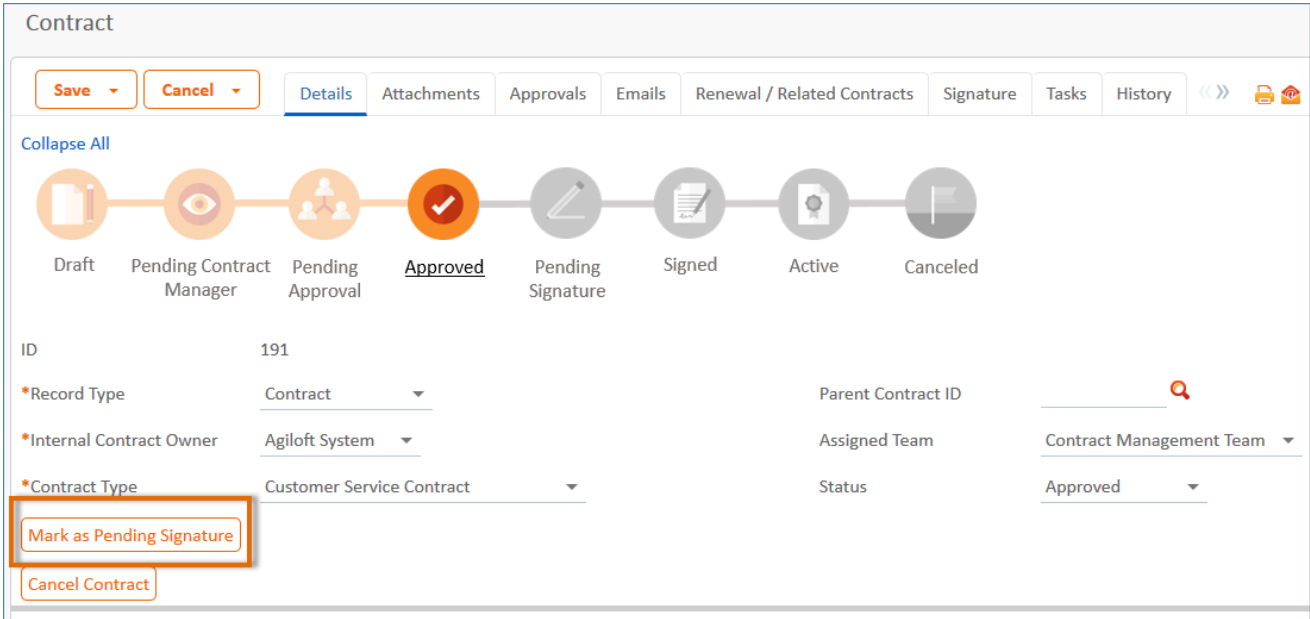
This section covers the remaining Status changes not mentioned in the explanations above. Once a contract changes to a Status of Signed, the system automatically updates the contract to a Status of Active when the Contract Start Date occurs.

Similarly, the Status is changed when the Contract End Date arrives. If the contract does not have an associated renewal contract, the Status is automatically set to Expired; if the contract does have a renewal, the Status is set to Renewed. If the contract is auto-renewing, the Contract End Date is increased by the Renewal Term in Months and the contract remains Active.

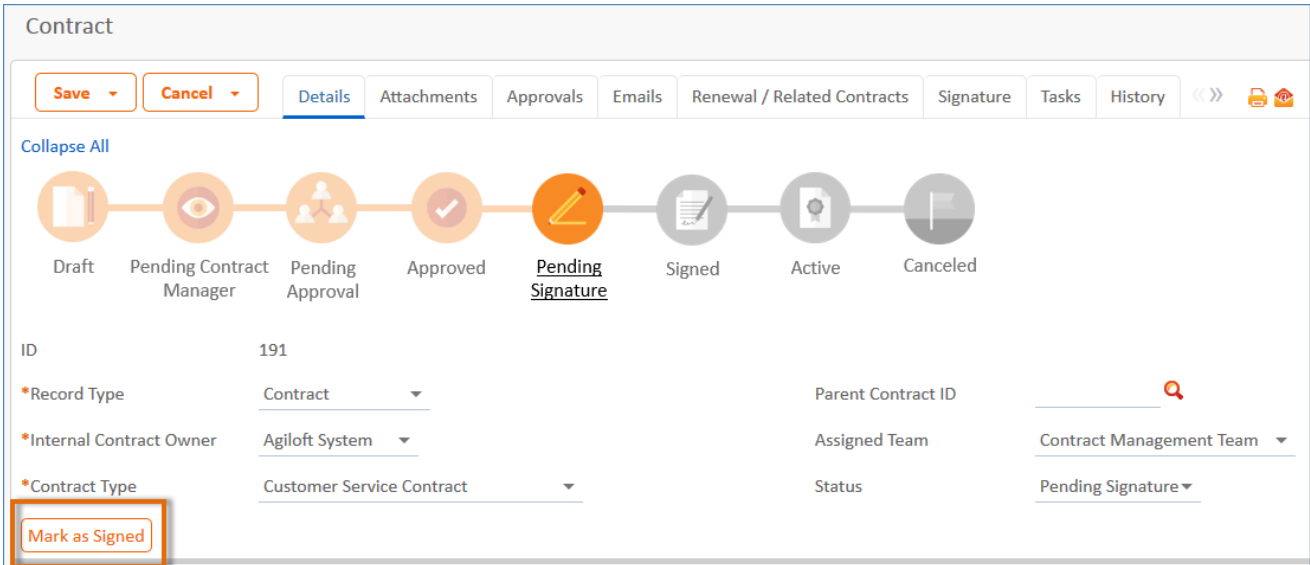
To cancel a contract, click the Cancel Contract button in the common area. Users of the Admin group can also manually change the contract Status to Canceled.

The screenshot shows the 'Contract' management interface. At the top, there are tabs for 'Save', 'Cancel', 'Details', 'Attachments', 'Approvals', 'Emails', 'Renewal / Related Contracts', 'Signature', 'Tasks', and 'History'. Below the tabs is a 'Collapse All' button and a status flow diagram with icons and labels: Draft, Pending Contract Manager, Pending Approval, Approved, Pending Signature, Signed, Active, Renewed, Expired, and Canceled. The 'Active' status is highlighted with an orange circle. Below the flow diagram, there are fields for 'ID' (69), '*Record Type' (Contract), '*Internal Contract Owner' (Robert Barash), '*Contract Type' (Customer Service Contract), 'Parent Contract ID', 'Assigned Team' (Contract Management Team), and 'Status' (Active). A 'Cancel Contract' button is highlighted with an orange box at the bottom left of the interface.

If the contract has a Status of Approved, the Mark as Pending Signature button is visible in the common area. This button sets the contract Status to Pending Signature.



Once the Status of the contract is Pending Signature, a Mark as Signed button appears.



Turning Off Approvals

Contract Management tables have Approval handling set up by default. The associated processes may be turned off in order to use Agiloft as a contract repository. To turn off Approvals, do the following:

1. Edit field permissions to allow the Contract Manager Group to edit the contract Status field in their own contracts and in others' contracts.

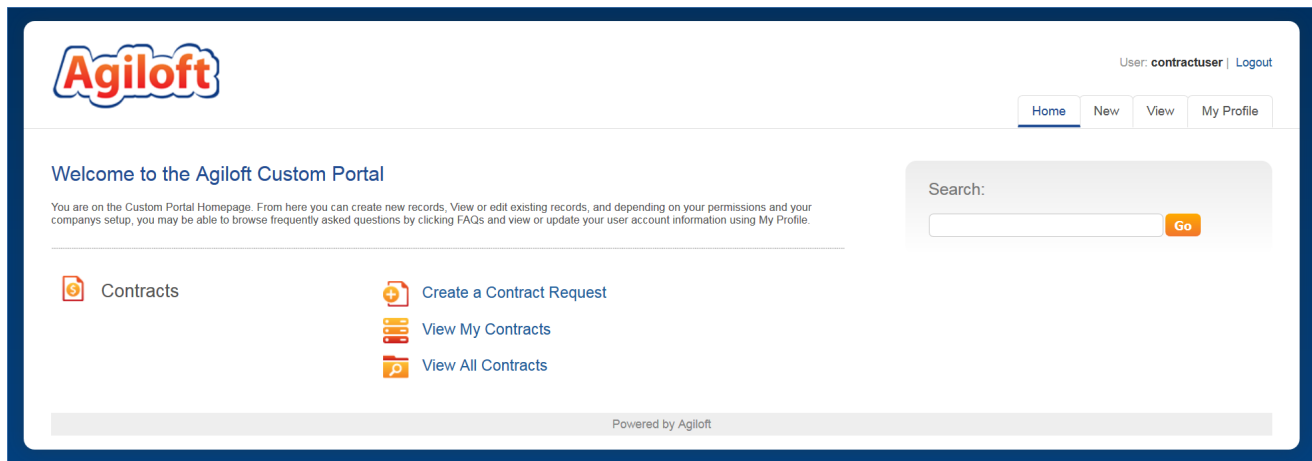
2. Remove status-changing buttons from the layout: Submit for Approval and Mark as Signed.
3. Remove the Approval tab and related fields from the layout.

For help on configuring table layouts, please refer to the Administrator Reference Manual or online help.

End User Use Case

This section covers the use case for end users in a Contract Management context.

Members of the Contract Creator group are internal employees accessing the system via the end user interface. Contract creators, also called contract requesters, are users who submit requests for contracts but do not work on or manage the contract once it is requested and submitted. Below is a representative home page for an end user in the Contract Creator group.



Creating Contracts

Users in the Contract Creator group may create contracts by clicking the Create a Contract Request link on the home page or by selecting **New > Contract** from the menu. A simplified contract form is presented to the end user. Many of the fields are hidden from the layout or restricted by field-level permissions.

Create a Contract

Contract

[Save](#) [Cancel](#) [Details](#) [Attachments](#) [Renewal / Related Contracts](#) [Tasks](#) [«»](#)

[Collapse All](#)

*Record Type ID 209

*Contract Type Parent Contract ID

[Submit for Review](#)

Requester Information

Requester Name Requester Phone Ext.

Requester Email

For Department Department Head [Rick Peterson](#)

Contract Information

Renewal Type *Days in advance to notify for renewal

In the Contract Party Information section, users can find and link to an existing company and contact, or create new ones as needed. Select New Company and then enter the name and address information. After the contract is submitted for review, Contract Managers can confirm the new company to finish adding a record. Similarly, end users can suggest a new company contact by filling out the fields in the Party Main Contact section of the form.

Contract Party Information

Contract Party Entry Existing Company New Company

Company Name

Location Name Primary Location ID

Street Address Street Address 2

City State / Province

Country

Zip or Postal Code

Party Main Contact

Company Contact Entry Existing Contact New Contact

Party Main Contact Party Main Contact Email

Once the required information is filled in, the contract can be saved for later revisions. The contract requester can also press the Submit for Review button to request approval from a Contract Manager. Contract requesters can be contacted to update the submitted contract, but they are typically no longer involved in the approval process from this point forward. After the contract requester submits the contract for review, a contract manager decides whether to continue with the approval process or reject the contract request.

The screenshot shows a web interface for managing contracts. At the top, there are three tabs: 'Details' (which is selected and underlined), 'Attachments', and 'Renewal / Related C...'. Below the tabs are two buttons: 'Save' and 'Cancel', both with dropdown arrows. The main form area contains the following fields:

ID	189
*Record Type	Contract
*Contract Type	Non-Disclosure Agreement

Below the form fields is a button labeled 'Submit for Review', which is highlighted with an orange border and a mouse cursor pointing to it. A horizontal line is visible below the 'Submit for Review' button.

Working with Contracts

At any time, the contract requester can view contracts they previously submitted by choosing **View > My Contracts** from the menu or by clicking on the View My Contracts link. Contract Creator group members can edit select fields in contracts they own. Certain fields such as Contract Amount, Contract Start Date, and Contract End Date (among others) are not editable by the contract requester if the contract's Status is Pending Approval, Approved, Signed, Active, Renewed, or Expired. This is to prevent changes to currently active or in process contracts.

The contract requester can view all contracts they have permission to see by clicking on the All Contracts home page link or tab.

Ownership of Contracts

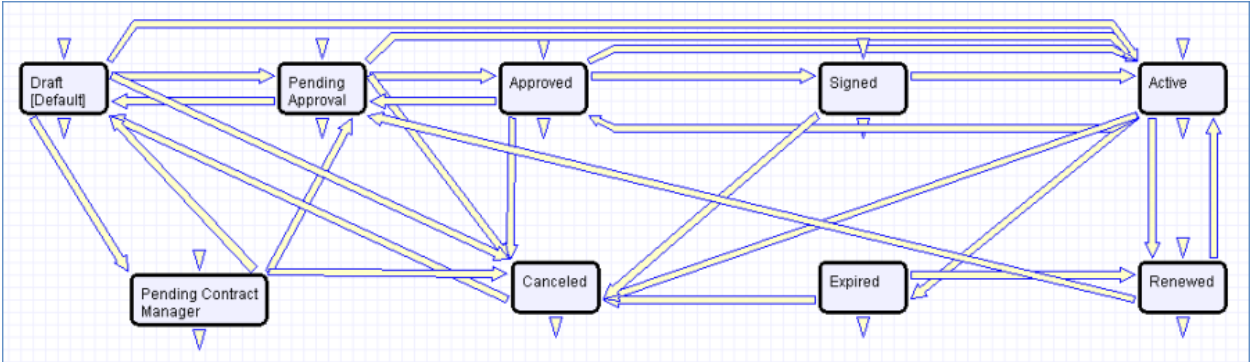
Records in this table are owned by the contract Requester. Specifically, a record is owned by the user whose ID matches the number in the Requester ID field. By default, the Contract Requester is the user who created the contract record.

Automation

The Contracts table has several rules set up. Their actions have been described in the use cases above. Rules which are run based on a schedule (rather than those which are event-triggered) are identified by the prefix "TB", for time-based and are disabled by default.

Workflow

The Contracts table has the following default workflow:



Reports

The Contracts table contains the following default Charts/Reports:

Charts/Reports								
Status: 14 record(s) found, 1 page(s). Click here to count records again..								
<input type="button" value="New"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>			<input type="button" value="Views"/> <input type="button" value="Search"/>					
<input type="checkbox"/>	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>			All Active Contracts with Vendors	Active Vendor Contracts (C)	No	May 13 2015 08:45	HTML	Standard
<input type="checkbox"/>			All Active Customer Contracts	Active Customer Contracts (C)	No	Oct 15 2013 15:24	HTML	Standard
<input type="checkbox"/>			Contract Amount by Status		No	Nov 26 2018 14:48	Graphical chart	Standard
<input type="checkbox"/>			Contract Expirations in next 90 days	Active Contract expiring within next 90 days (C)	No	Nov 26 2018 14:48	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			Contracts by Party Type		No	Nov 26 2018 14:48	Graphical chart, HTML	Standard
<input type="checkbox"/>			Contracts by Type		No	Nov 26 2018 14:48	Graphical chart, HTML	Standard
<input type="checkbox"/>			Contracts Excel Dashboard		Yes	Nov 29 2017 10:01	Excel	Standard
<input type="checkbox"/>			Contracts in Progress	Contracts with an In Progress Status (C)	Yes	Nov 26 2018 14:49	Graphical chart, HTML	Standard
<input type="checkbox"/>			Contracts in Progress Ring Chart	Contracts with an In Progress Status (C)	Yes	Nov 26 2018 14:49	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			Contracts Pending Approval by Contract Type	Status is Pending Approval	Yes	Nov 26 2018 14:50	Graphical chart	Standard
<input type="checkbox"/>			Value of Signed and Active Contracts by Fiscal Year	C: Status is Signed or Active	No	Dec 12 2018 15:26	Graphical chart, HTML	Standard
<input type="checkbox"/>			Value of Signed Contracts starting in Past year	Active Contracts whose start date is less than a year ago (C)	No	Nov 26 2018 14:50	Graphical chart, HTML	Standard
<input type="checkbox"/>			Value of Signed Customer Contracts starting in Past year	C: Active Customer Contracts whose start date is less than a year ago	No	Nov 26 2018 14:50	Graphical chart, HTML	Standard
<input type="checkbox"/>			Value of Signed Vendor Contracts starting in Past year	Signed Vendor Contracts whose start date is less than a year ago (C)	No	Nov 26 2018 14:50	Graphical chart, HTML	Standard