Contract Management Tables

The Contract Management system is designed with a variety of out-of-the-box approval processes. It is easy to eliminate or modify functions to better fit a desired business process.

Most of the time-based rules are disabled by default and need to be enabled to work correctly. To do this, go to the Rules tab of the Setup Contracts page, edit a rule with "(DISABLED)" in the title, and click Yes in the "Rule is enabled" section at the bottom of the page. Once you've enabled the rule, remove "(DISABLED)" from the Description section to prevent confusion.

The Contract Management system is comprised of a few main tables, with background tables playing a supporting role. The system comprises of the following tables.

- **Approvals:** This table holds the individual approvals related to a contract. The approval records are shown within the contract.
- **Approval Templates:** This table holds the templates used to generate Approval records. A Workflow contains references to multiple Approval Templates.
- **Approval Workflows:** This table holds workflows used to manage approvals. A workflow may have a combination of sequential or parallel approvals that can be selected prior to the initiation of the approval process. Approvals can also be generated manually on an ad hoc basis.
- **Attachments:** This table holds all of the contract files and associated documents for each contract.
- **Attachment Types:** This table holds the list of different types of attachments used to categorize contract attachments.
- **Clause Library**: This table holds default paragraphs or clauses for your standard contract types and their variations and may provide the source of all approved language within Document Templates and contracts.
- **Clause Types**: The list of clause types associated with particular clauses in the clause library.
- **Companies:** A table holding all companies with which your company does business, including suppliers and customers.
- **Company Documents**: A table holding documents related to external companies, such as Insurance Certificates, Status Reports, Performance Bonds, and onboarding materials.
- **Contracts:** This table holds all contract data and contains several embedded tables holding attached files and supporting documents, approvals, risk conditions, and so on.
- **Contract Requests:** This table is for Contract Requesters to create new contracts, and contains a self-serve workflow to allow Contract Requesters to execute contracts using pre-approved templates.
- **Contract Clauses**: Clauses used within and linked to specific contracts, which may include clauses from the clause library or clauses extracted from 3rd party documents.
- **Contract Risk Conditions:** Generated from the Risk Conditions, these records sum the various elements of risk for a particular contract.
- **Contract Types:** This table holds a list of your contract types as well as information about additional metadata, Document Templates, approval workflows, and more for each contract type.
- **Departments:** A list of departments and the department heads for your organization, so that contracts can be associated with a department and approved by department heads, if desired.

- **Document Templates:** This table holds the templates that hold the standard language elements for contracts. A Document Template can be automatically pulled into a contract record based on Contract Type and other essential information, and it can be used to generate a custom contract document that fills in the metadata from the contract.
- **Document Template Clauses**: This holds the set of clauses from the clause library related to a particular Document Template.
- **Email Texts**: This table holds preconfigured email texts that can be selected by users to send in relation to a contract.
- **Insurance Coverages:** This table is used to manage individual insurance coverages for insurance certificates so they can be applied to multiple contracts and renewals automatically requested from suppliers.
- **Locations:** This table holds address information for companies. A company may have a primary location and multiple additional locations.
- **Payments:** This table can be used to hold payment information related to contracts.
- **People—Employees and External Users:** Two subtables that hold all contact information for employees and people with whom you do business. These hold records for customer contacts, supplier contacts, and employees and partners – anyone who should be automatically emailed by the system or who will be able to log in to the system.
- **Risk Conditions:** This table holds custom risk elements and weightings defined for your contracts, based on meta data in the contract, such as length of the contract, value, type of contract, and so on.
- **Renewal Types**: This table holds the list of available renewal types for contracts, and their associated fields which must be displayed in the contract record.
- **Roles:** The set of roles for users of the system that determine their default groups and teams.
- **Tasks:** This table can be used to schedule contract obligations, milestones, fulfillment, approval, or other tasks.
- **Task Templates:** This table holds the task templates that will be used to generate tasks for a contract or project.
- **Task Workflows**: This table holds workflows predefined with task templates that can be generated for contracts based on the contract type or other features.

In addition, the Supplier Portal is designed to be used with the Contract Management system if you are handling buy-side contracts. It simplifies the task of managing insurance certificates and other company documents.

- Contracts Table
- Contract Requests Table
- Contract Types Table
- Document Template Clauses Table
- Contract Clause Table
- Clause Library Table
- Clause Types Table
- Risk Conditions Table

- Contract Risk Conditions Table
- DocuSign Tables Overview
- Adobe Sign Tables Overview
- Payments Table
- Renewal Types Table
- Contract Budget Items Table