

Contract Clause Table

The Contract Clause table stores records of clauses within a contract that have been added as part of the Document Template from the Clause Library, annotated or added in the Word Add-in, or extracted using AI. Contract Clause records represent clauses located within the Contract document, and reflect changes to the Contract throughout the contract lifecycle.

It's important to know the difference between Contract Clause records and Clause records. Each Contract Clause record is associated with one Contract, and may contain language that is non-native to your organization, whereas Clause records in the Clause Library represent the standard versions of clauses your organization has legally vetted for use. Contract Clause records can be compared against Clause records to ensure the language in the non-native contract adheres to your organization's legal and professional standards.

This table is also used in the Clause AI handling script.

Use Case

Records are automatically created in this table using four possible methods:

1. A document template with clauses is generated from the Contract record using the "Create and Attach" button in the Contract. In the standard system demo, the options "Automatically tag contract clause texts referred in \$field_from_other_table", and "Add contract clause IDs to document tags" are checked by default which allows the creation of the contract clauses when the document is generated.
2. Using the Word Add-in by either manually annotating clauses in the Word document or manually adding clauses from the library, then syncing to Agiloft.
3. Clauses extracted using AI via the Word Add-in.
4. Clauses extracted using the "Extract Clauses" button in the attachment record, which runs a machine learning action.



For more information on how to use the Word Add-in, view the [Agiloft Contract Assistant for Word](#) articles.

Contract Clause records are automatically updated when the contract attachment is edited using "Edit and Checkout" and the change is saved. The "Compare the Baseline" action on Attachments runs and compares the newest version against its original, or "baseline." Changes to the clauses are marked up in the Contract Clause records. Markup is controlled by the "Extract Clauses From Contract Document - Properties" global variable, which is included in the standard system demo or added to a KB when the Word app is installed.

Automation

In the Standard System Demo, the Contract Clause table contains multiple active rules.

- **Create: all create rules for contract clauses (Web, API):** This rule sets the source field, source text, current clause text, and clause type.
- **Edit: Handle status changes and updates (do not run on creation after other rules):** This rule sets the Clause Modified flag and updates the status.
- **Flag to Trigger Clause Type Obligation is Yes:** This rule runs on edit when the Flag to Trigger Clause Type Obligation is Yes. It uses a linked record action to find the Obligation Templates linked to its Clause Type, and converts them to Task (Obligation) records.

Ownership

Records are owned by their creator.