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Contract Lifecycle Management (CLM) Quick Reference Guide

April 2026

Introduction

This guide will offer a summary of some of the most used features and functions in CLM, from an end-user perspective.

Sections are color-coded and based on specific individual functionalities. Ways in which features work together are highlighted and linked in each section.
Global user roles provide access permissions to CLM features, screens, and functionality. In each section, the user roles that have access to the screen or function being shown are indicated.

The audience for this guide is both end-user clients of CLM and internal users, such as Sales Solutions Architects, Account Managers, Account Executives, and PSO Business Consultants.

If you have any questions about this guide or the content contained therein, please contact Ro Markevitch, Sales Solutions Consultant or your Account Manager.

Using this Guide

User roles in CLM are defined below and represented with icons. Throughout this guide, the user roles that have access to the screen or function will be indicated by the appropriate icon(s) that corresponds to user access for that area.

CHIEF NEGOTIATOR

Leads contract negotiations and is responsible for overall contract execution. Often called “General Counsel”

CONTRACT MANAGER

Manages executed contracts, can view all in-progress contracts (not marked Private), can initiate new contracts.

REQUESTER

Creates new contract requests, only sees contract requests and contracts created from their requests.

ADMINISTRATOR

Maintains and configures the system and users, creates/edits templates, assigns/removes roles, configures workflows

VIEWER

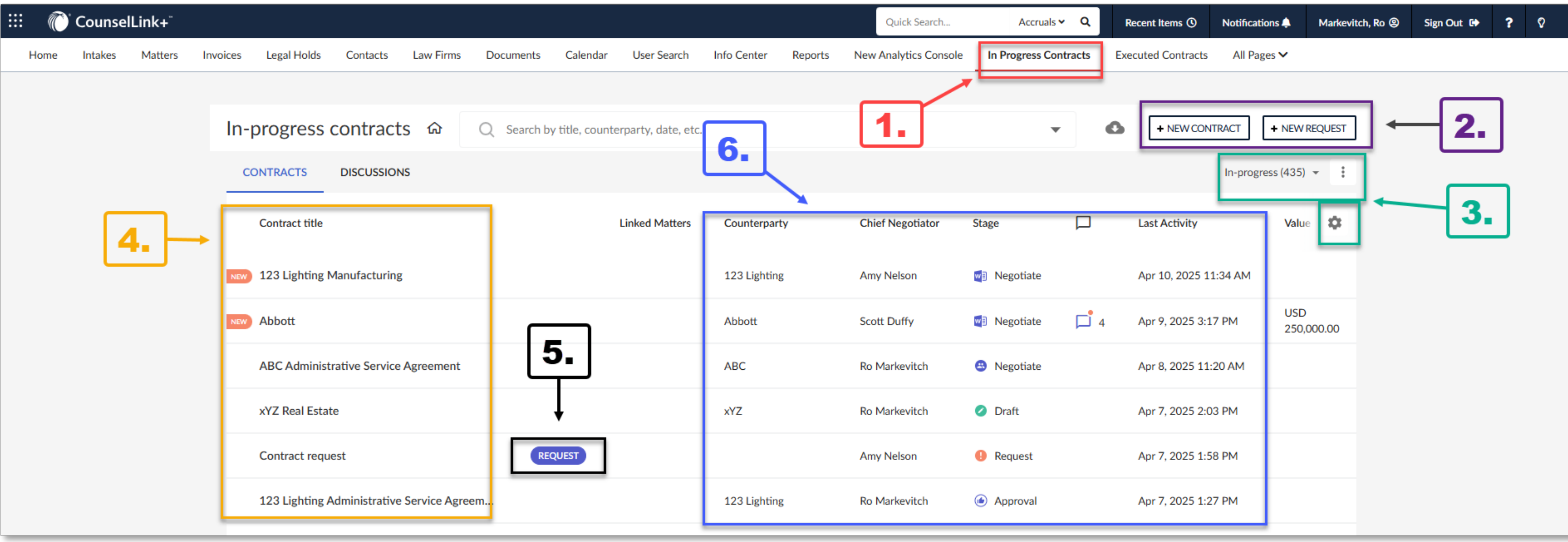
Can view contracts in the In-progress and Executed screens only. Often combined with other roles

VIEWER PLUS

Can view and download contracts only. Often combined with other roles

IN-PROGRESS CONTRACTS

All new requests and currently in progress contracts are visible on this screen. **Chief Negotiators** will only see the contracts that they are working on. **Contract Managers** see all contracts not marked private. **Requesters** see their requests only.



1. Access the In-progress contracts screen here.
2. New contracts and new requests are initiated with one of these two buttons.
3. Choose which columns appear on this screen, how contracts and requests are grouped, and which contract stage you wish to view.
4. The contract or request title appears here.
5. If the contract is a new request, it will be indicated here.
6. Columns chosen (see #3) determine the data shown here.

PROCESS DESCRIPTION

NEW REQUEST

When a contract is requested, the requestor will fill out a customized intake form that will capture the requirements of for the contract that is being requested. Once the general counsel (*Chief Negotiator*, in CLM parlance) receives the request and begins to work on it, the request becomes an "in-progress" contract.

ASSIGNMENT WORKFLOWS

General counsel are assigned to work on contracts via routing workflows; these are configured based on customers' business processes to route the work to the appropriate counsel. For example, you can route new contract requests by department, category, region, contract type, value, or any custom field that may be configured.

WORKING ON THE CONTRACT

Once general counsel moves the contract to the Review stage, they may then begin working at the clause level to edit (redline), add text or clauses, and add comments to other internal users with whom the contract has been shared (either via automatic workflow or manually, using the Share button). All edits and comments are only visible to the internal team at this stage. Once this work is complete, the general counsel or and Leads that have been invited to the contract may move it to the Negotiate stage. In the Negotiate stage, all subsequent redlines, comments, etc. may now still only be shared internally or may now also be shared externally with the counterparty.

DISCUSSION ITEMS

All redlines, text additions, and comments become Discussion Items. The individual items can be viewed either next to the contract document, or in a list on the Discussions page for the contract. In the Negotiate stage, the counterparty may also work in the contract with you simultaneously, with both parties able to do so privately. The counterparty may add their own comments and edits, which they may then share with you. Once open, these comments and edits are accepted or resolved, the contract can move to the Sign stage.

SIGNING THE CONTRACT

Both DocuSign and Adobe Sign integrate with CLM out of the box. If one or both applications are configured, CLM will prompt you to choose the application to complete signing. When you click on the signing app, that app will open and the rest of the signing process will be setup to send for signature from within that app. If you do not have or do not wish t use either signing app for a particular contract, manually signing is always available. In this case, you'll just download the contract and send it via email to the counterparty. Then scan in the signed version and upload it into the contract container in CLM.

POST-EXECUTION MANAGEMENT

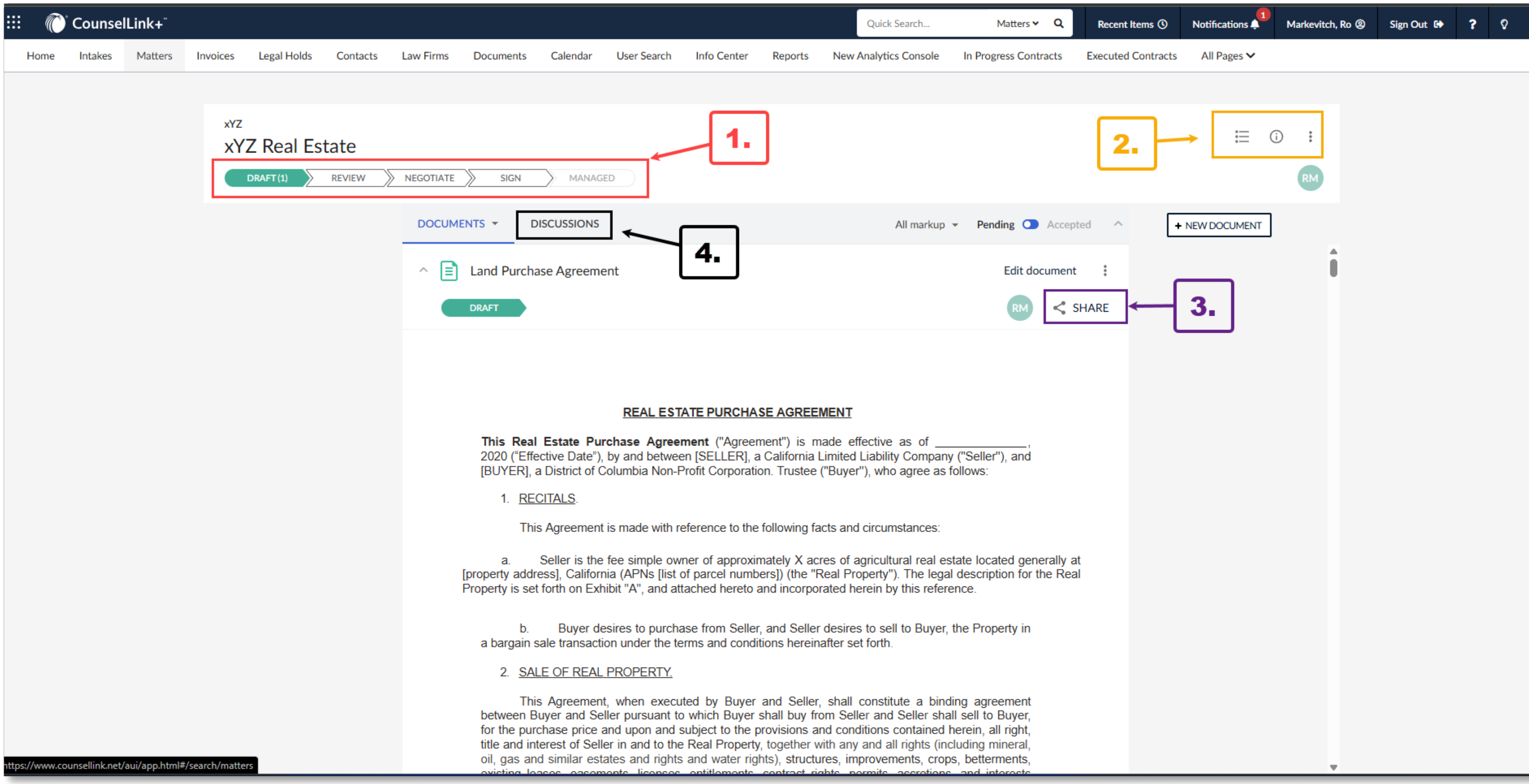
Once a contract is signed, it moves to the Executed Contracts area of CLM. This is the post-execution repository for contracts, where managed metrics are configured. Extractive AI is available in CounselLink + CLM for executed contracts. AI fields can be configured to auto-populate custom data from within the contract. Manual contract field management is also available; setting up standard benchmarks and dates such as renewals, expirations, and dated notifications are all done at this stage.

REPORTING

CLM also has a data analytics dashboard, individual contract audit trails, approval workflows, and reporting metrics built in

WORKING IN A CONTRACT

Chief Negotiators can edit, comment, and redline only contracts that they are assigned to. The Chief Negotiator is assigned based on Routing Workflows but can always be reassigned in the contract metadata.

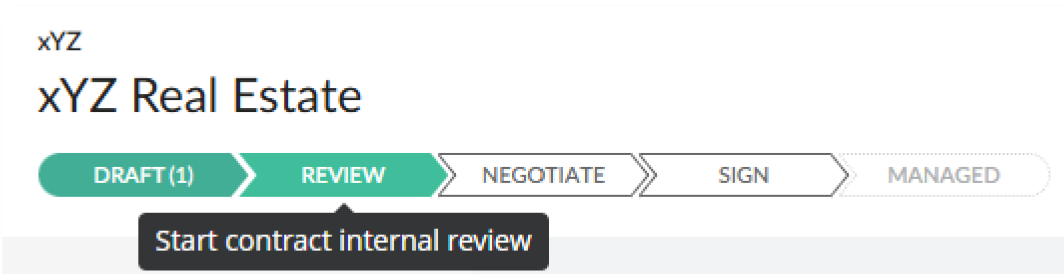


1. Contract stages. Click to move the contract to the next stage.
2. The Audit Trail, contract metadata, and the ability to cancel, delete, or download a contract are found here.
3. Click to share the contract internally with a user or a team.
4. All edits and comments in the contract become individual discussion items.

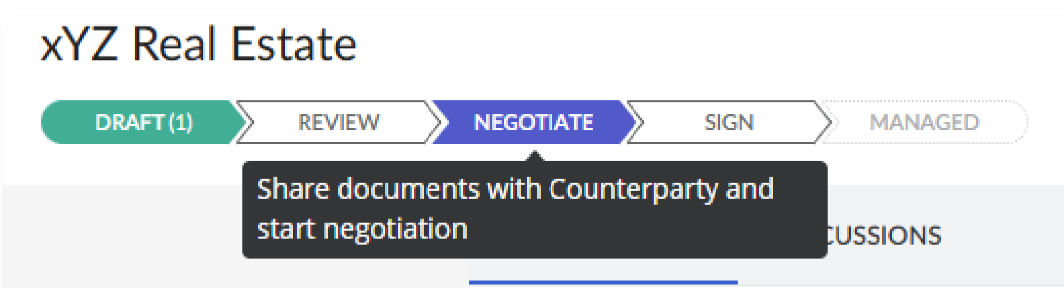
WORKING IN A CONTRACT A closer look: STAGES

NOTE:
Internal processes and users are denoted in GREEN.
External processes and users are denoted in PURPLE.

Draft is the initial stage of a new contract. Correct any formatting, etc. at this stage before beginning to work on the contract.



When you're ready to share internally and/or begin working on the contract, move it to Review. Redlining, adding text, and adding internal comments are now available.

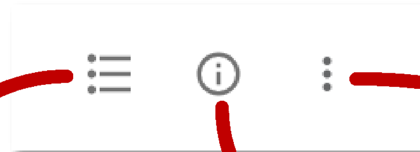


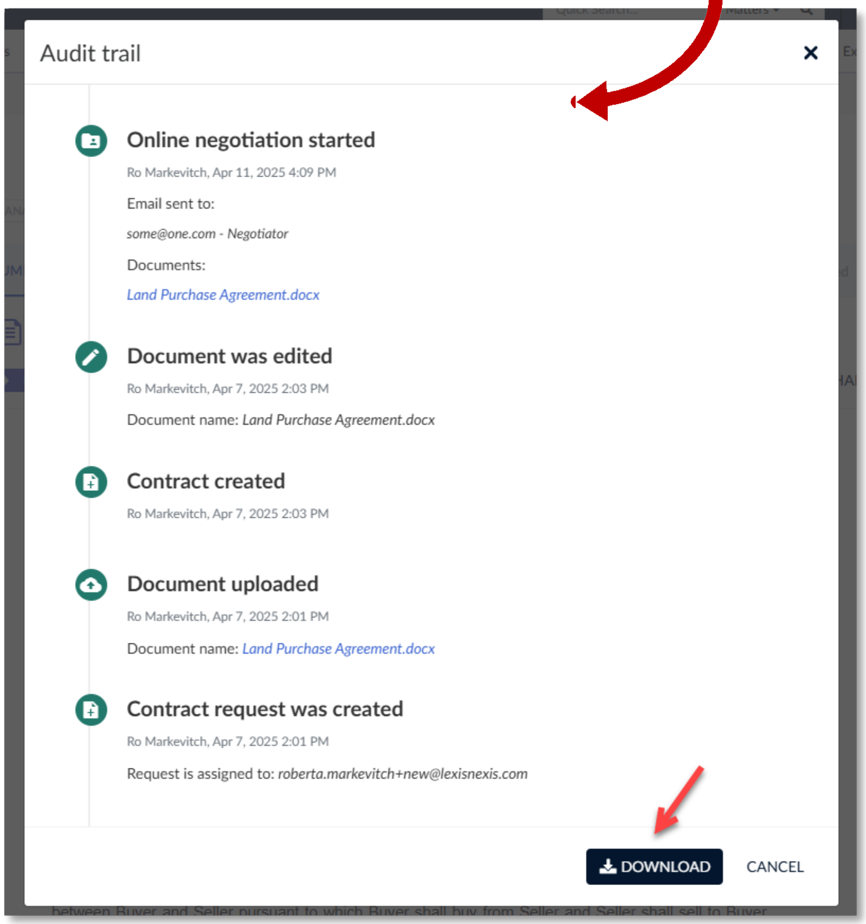
Once internal discussions are closed, move to Negotiate. This shares the contract externally with your counterparty. Continue to work in the contract as before, edits may now be shared externally, and counterparty may wok in the contract simultaneously.

When negotiations and edits are complete, move the contract to the Sign stage. Adobe Sign and DocuSign integrate with CLM. Manually signing is always available.

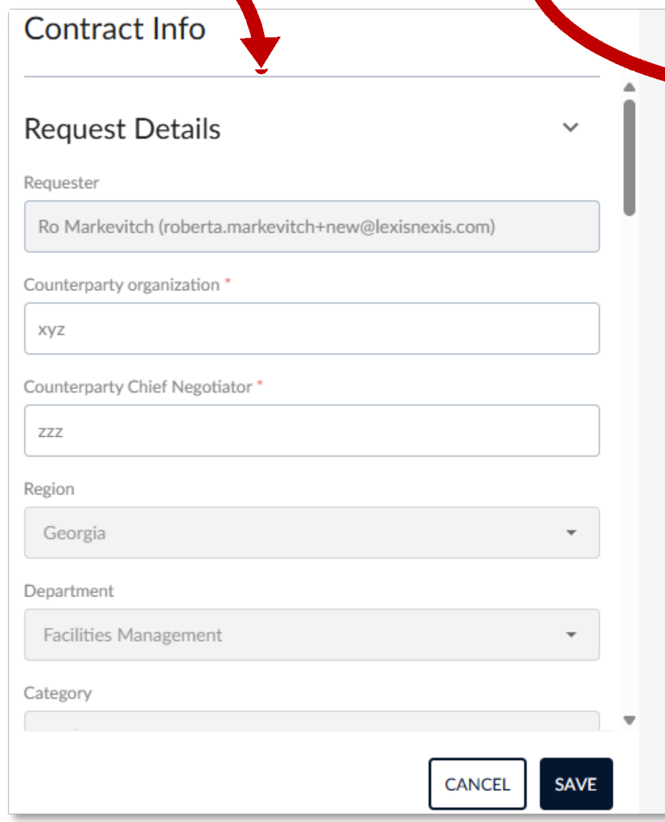
A closer look:

CONTRACT CONTROLS & AUDIT TRAIL

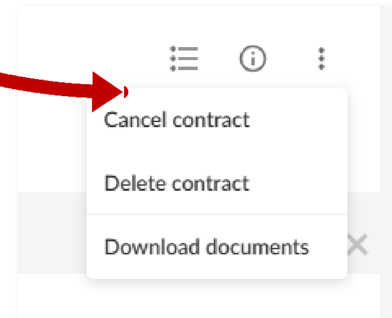




This icon displays the downloadable audit trail for the contract.

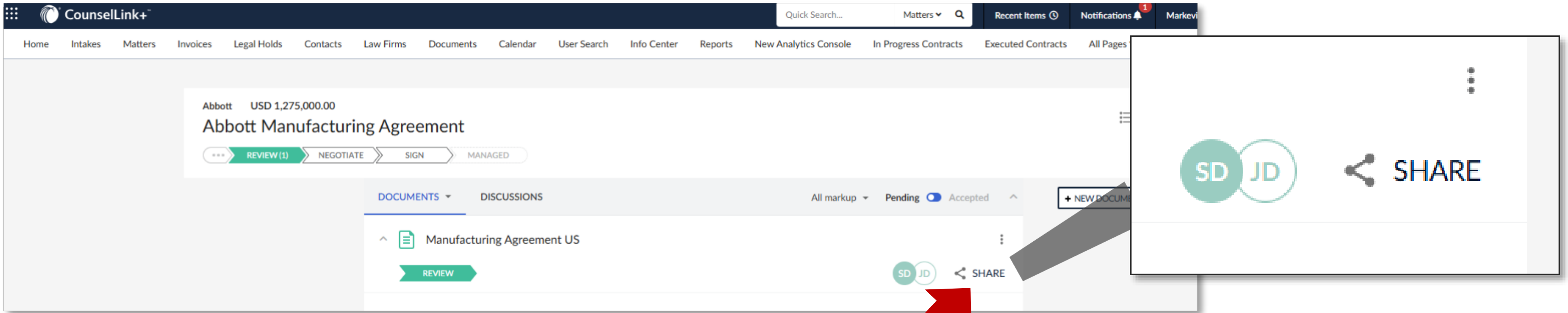


This icon displays all the contract metadata, including details of the request and (not shown) the standard, custom, counterparty, team, and contract exclusive details. This is also where you can update the Chief Negotiator for the contract.

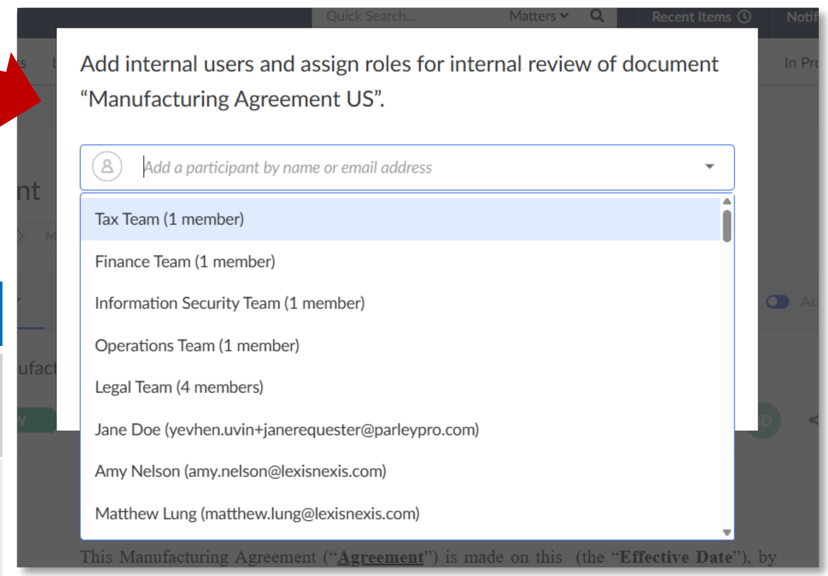


This icon allows you to cancel or delete the contract. Or download the contract document(s).

Sharing Internally



Click **Share**, then select a user or team to share the contract with.



Choose to share the contract with the user or team as either **Leads** or **Reviewers.**

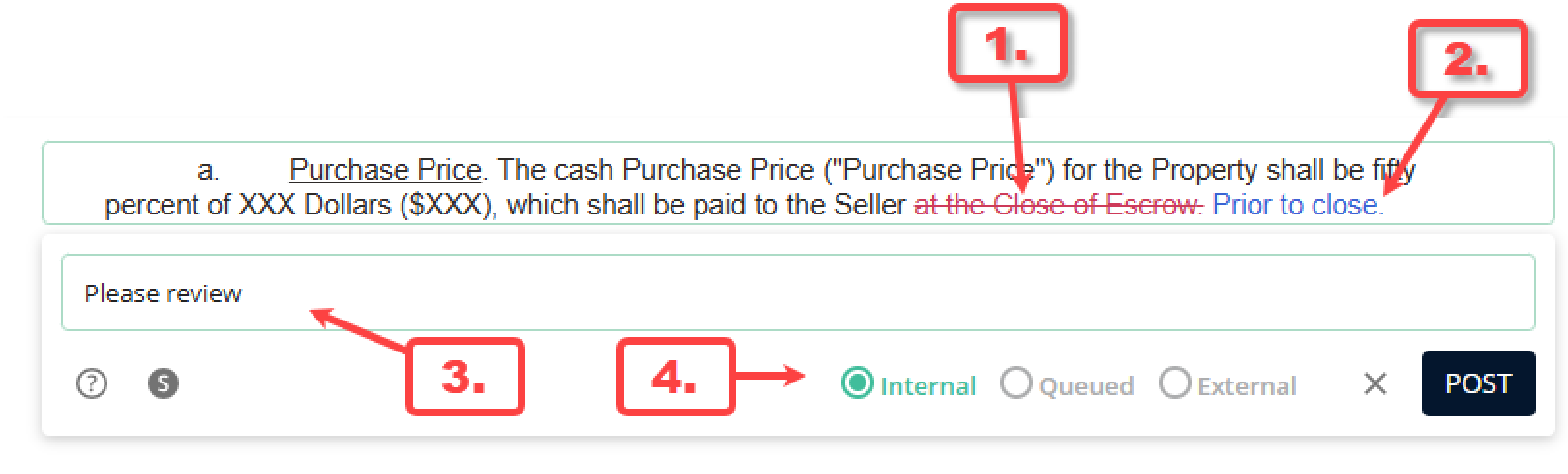
LEAD	REVIEWER
Can invite additional users to the document	Can create *internal* discussions only
Able to create both internal and external edits & discussions	Can respond internally to both internal & external edits & discussions
Able to accept proposed redlines	Able to close discussions that do not involve redlines
Can close both internal & external discussions	

To work on a contract, move it to either the **Review** stage to share internally, or the **Negotiate** stage to share both internally and with the counterparty. You may now begin working on the contract at the clause level by clicking into any clause. Redlining, adding text, and making comments to your team and, when in the correct stage, to the counterparty.

- In **Review** , all comments, edits, redlines, and additions are only available to post internally.
- In **Negotiate**, all items are viewable to both internal participants and to the counterparty.

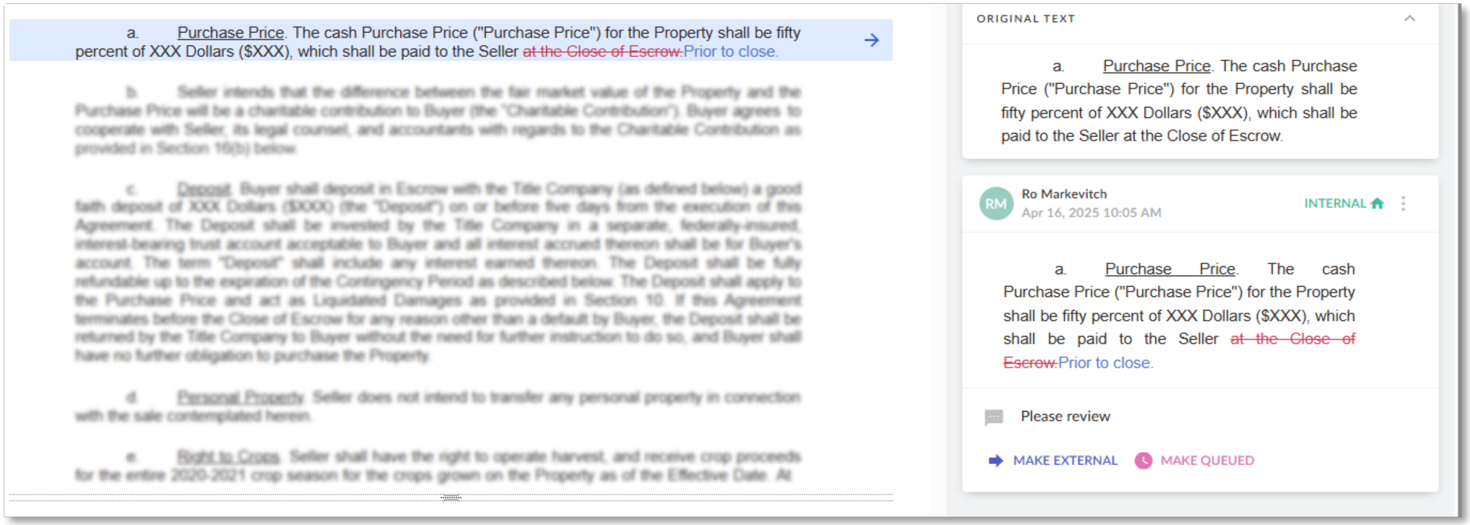
You may also use **Queued** as an option for your edits and comments. This allows your team to review the queued items prior to releasing them to the counterparty (marking them as External). It also allows you to send all the queued items at once to the counterparty, rather than sending individual edits and comments. This is usually preferable so that the counterparty receives fewer email notifications of changes in the document.

Once the contract is in an editable stage, you may now begin to work at the clause level within the contract.

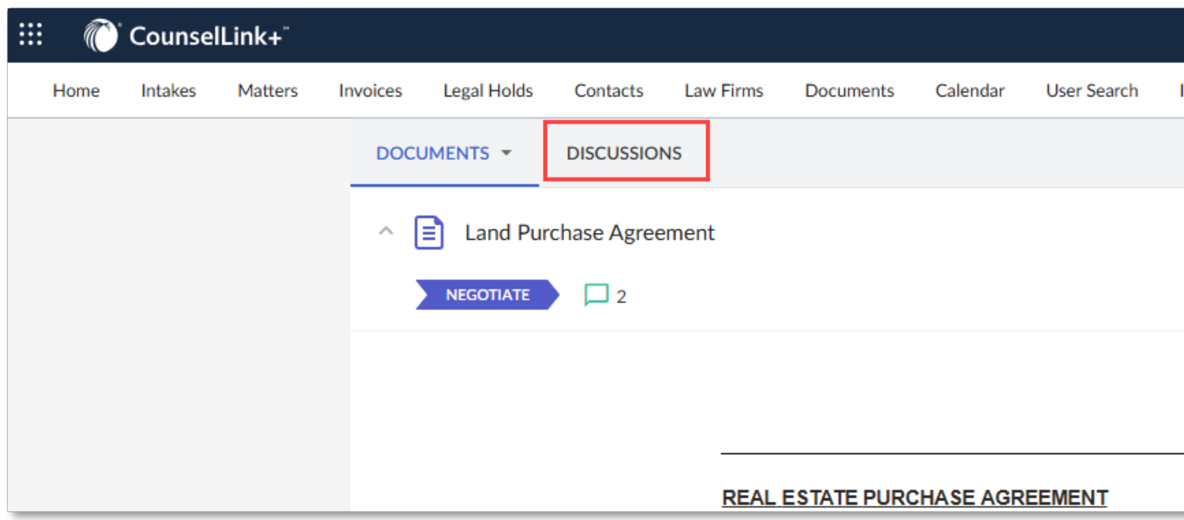


1. Deleting text results in “redlining”.
2. Add new text any place within the clause; it will appear in blue.
3. Add any comments here. Use the @ symbol to instantly share the contract with anyone in your organization with an account in the system.
4. Choose whether the edits and/or comments should be shared internally, externally, or are to be queued. In this case, the contract is in the Negotiate stage, so all three options are shown.

WORKING IN A CONTRACT › A closer look: DISCUSSION ITEMS, cont.



When you post the edits and/or comment for the clause you're working on, you may then view it to the right of the document, next to the section that was changed or commented on.

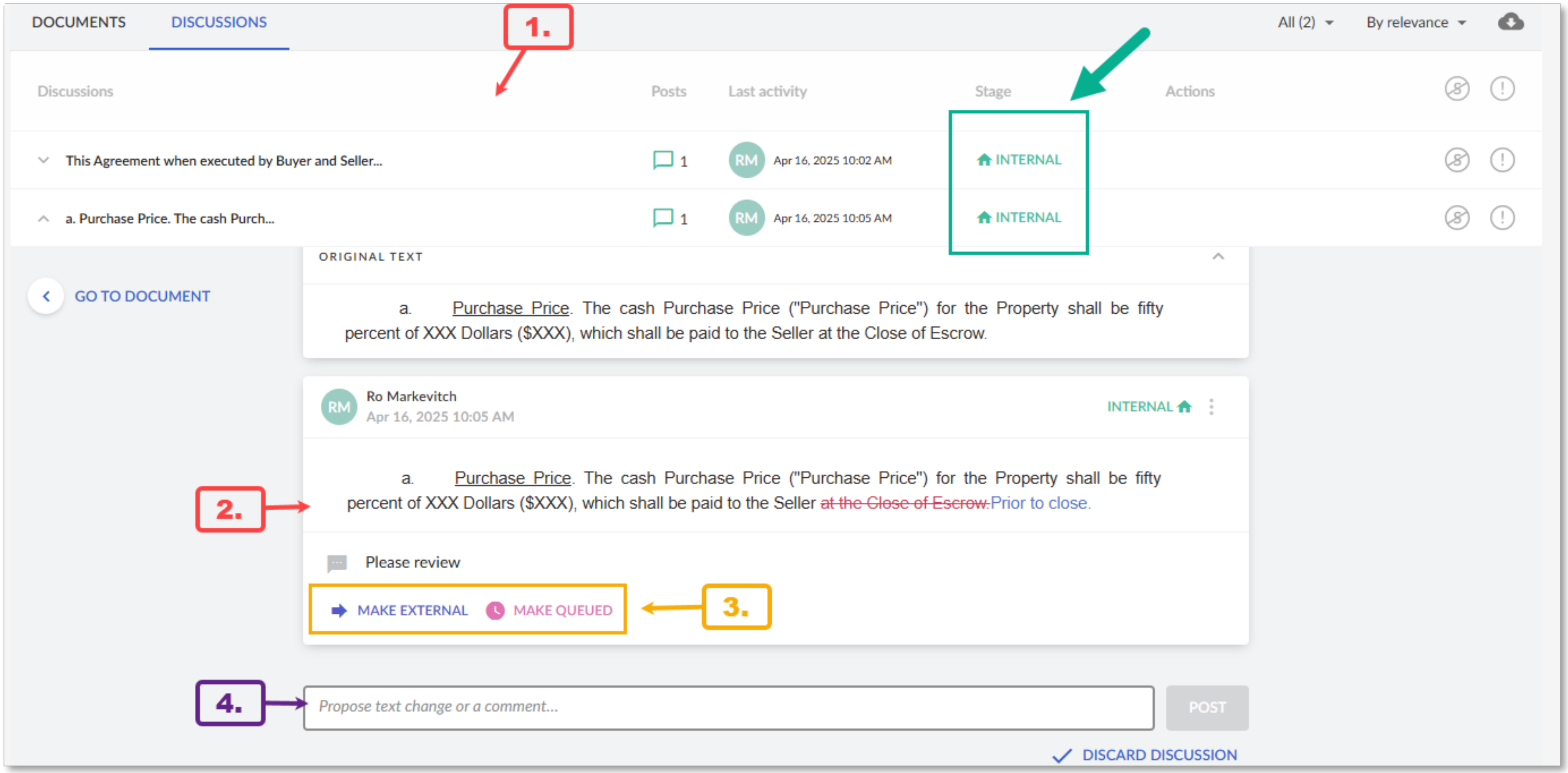


You can also access the **Discussions** page for the contract here. All comments and edits are visible in an "accordion" view on this page.

WORKING IN A CONTRACT A closer look:

DISCUSSION ITEMS, cont.

Discussions Page “Accordion” View



1. Individual discussion items. Both items shown are **Internal** posts.
2. Unrolling the discussion item shows the details of edits and comments.
3. You may choose to make internal discussion items either queued or external, if the item was created while in the Negotiate stage.
4. Internal users may propose changes or add their own comments to the discussion item.

REQUESTING A CONTRACT

- The Requester role
- Request Form
- Contract paper, templates & attachments

The Requester Role

Requesting a new contract requires the user to have the Requester role in CLM. Requesters with no other roles can only see the details of and edit their own requests. Once a request is being worked on by the Chief Negotiator, it becomes an in-progress contract, and the requester will no longer have any visibility into or ability to edit the request.

Request Form

The request form (fig.1) is highly configurable and works in conjunction with custom fields. There is cascading logic built into the request forms during the client implementation process. For example, if in the Department field on the request form, HR is selected, the subsequent fields will reflect relevant choices related to the HR department, e.g., Contract Types: employment agreement, NDA, Letter of Termination, etc.

Including (or not including) Contract Paper or Attachments

Requester may add documents to their requests, either as the contract paper associated with the request (internal or counterparty paper), by selecting a pre-configured template, or just as an attachment (fig.2). Request forms may also be set to restrict the requester from adding any contract paper or attachments; this on/off choice is configured during implementation, based on client's desired process for request intake.

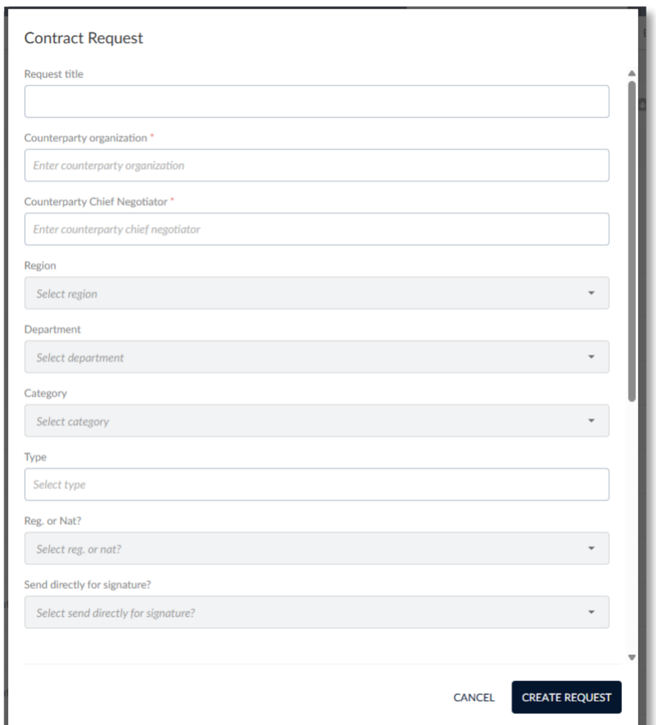


Fig. 1: Example of a typical request form

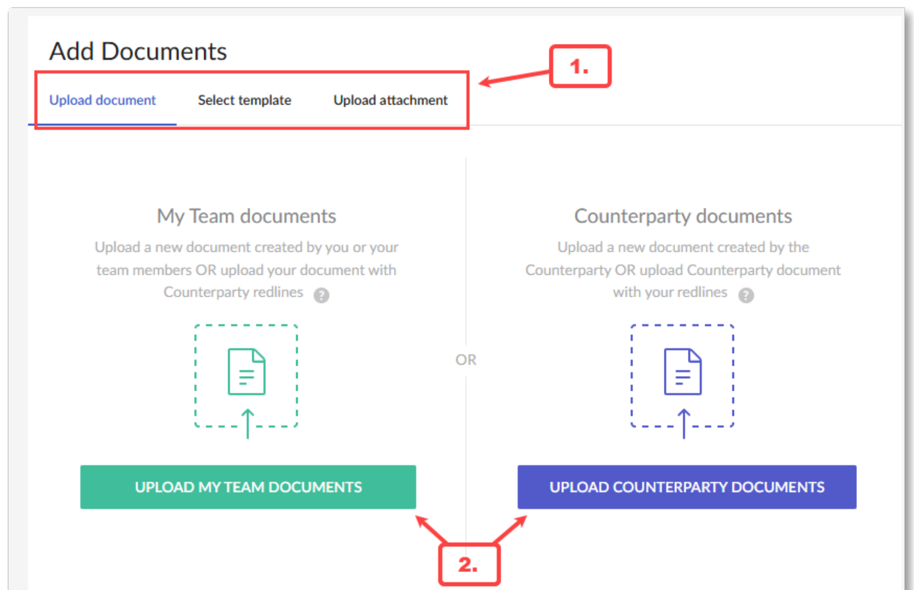


Fig. 2

1. Choose Upload a Document, Template, or Upload an Attachment
2. If uploading a document, choose My Teams (internal) or Counterparty (external)

Permissions and tasks overview

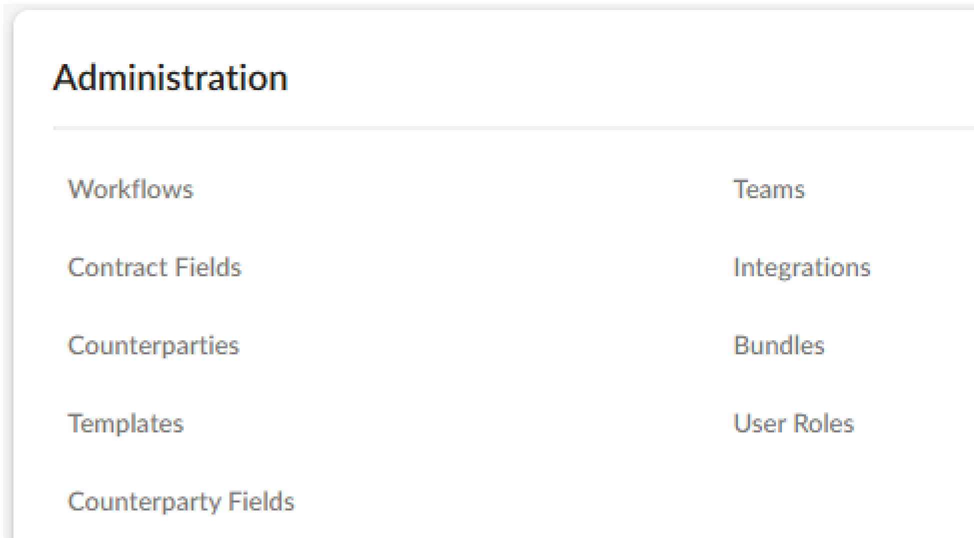
The Administrator user role in CLM can perform the following task in the system:

- Add, remove, suspend user accounts
- Add and remove global system roles to users' accounts
- Delegate a user's roles and responsibilities to another user
- Edit and create workflows
- Edit and create custom fields
- Add, remove, and edit templates
- Add, remove, and edit counterparty contact data
- Create teams and add or remove users to the team

Things the Administrator **CAN'T** do (if Admin is the only role they have):

- View any contracts or requests
- Participate in any part of the contract lifecycle

The Administration panel in CounselLink, showing all CLM Administrator tasks.

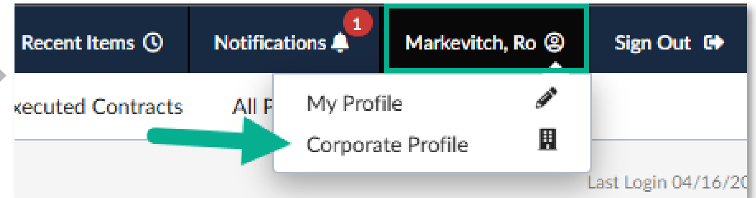


IMPORTANT NOTE:

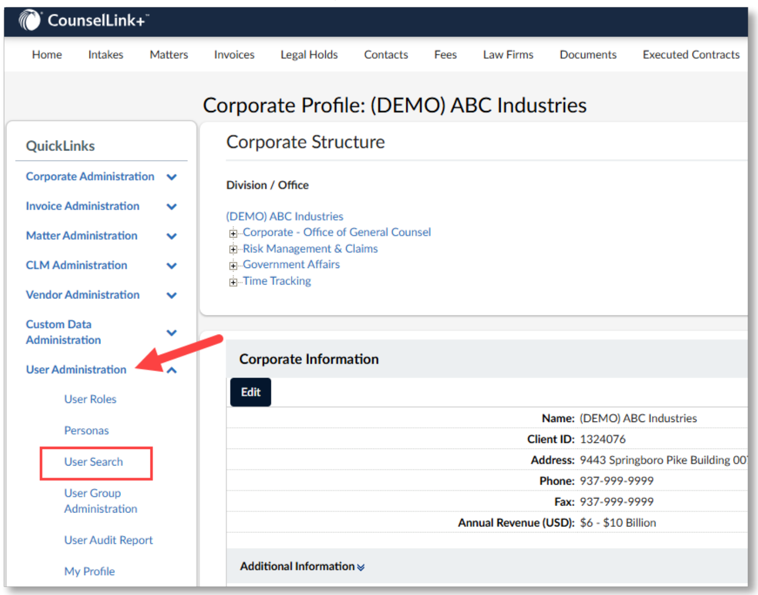
Administrators in CLM with no other roles are generally the client's IT or office management personnel. The Administrator role has access to system configurations that are set up during the implementation process. These functions can be changed by Administrators in ways that may cause functions in CLM to become "broken". It is therefore extremely important that Administrators receive thorough training before "go-live".

User Accounts

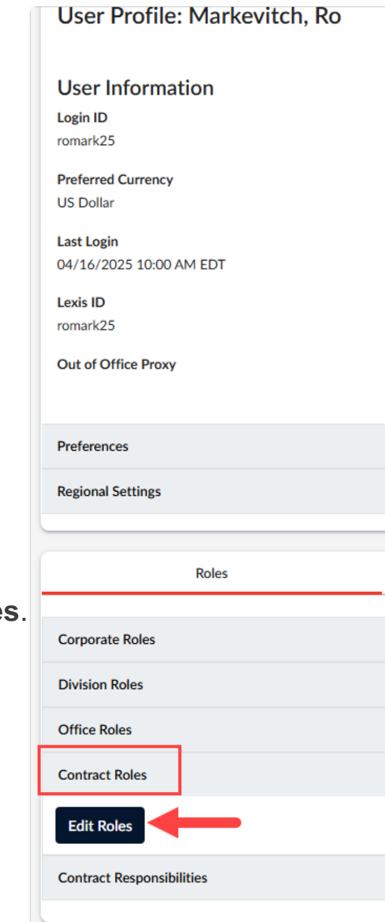
1. To create new users or edit existing users and associated roles, go to **Corporate Profile**. When you click on your username in the upper right side of any CounselLink screen, **My Profile** and **Corporate Profile** appear.



2. In the Quick Links vertical sidebar on the left side of the screen, look for **User Administration** and then click **User Search**

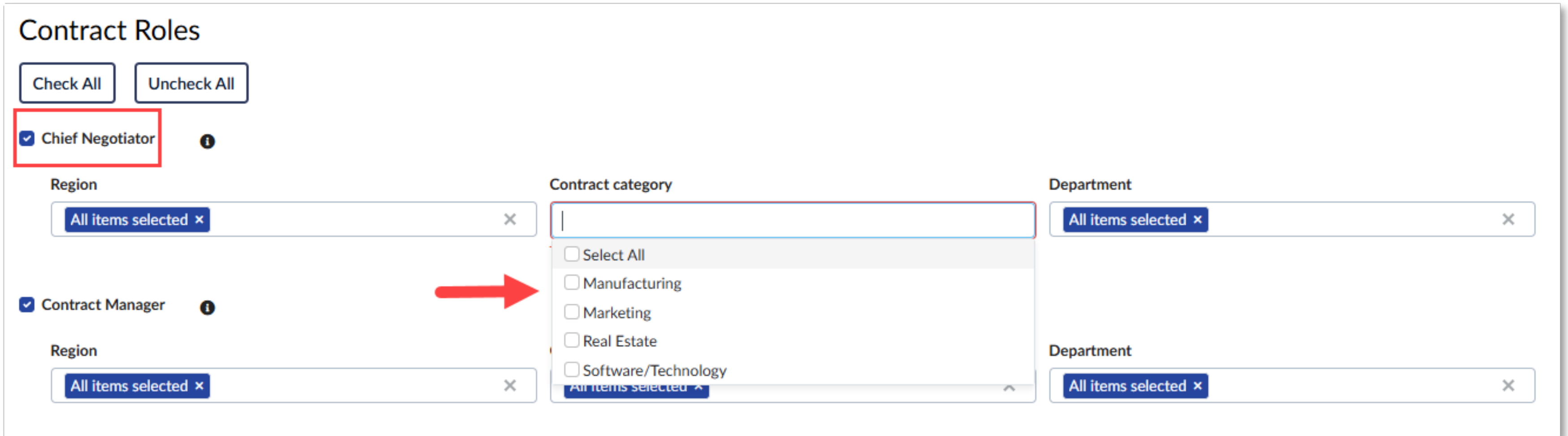


3. Scroll down to **Contract Roles** and click to expand. Then click **Edit Roles**.



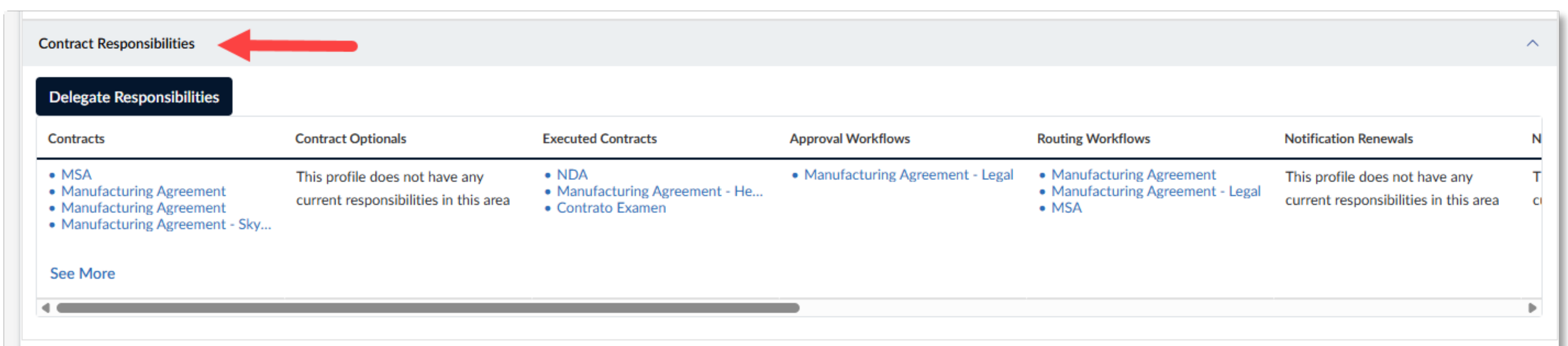
Note:
User can be created in CLM with **no global roles**. This is sometimes needed for users that will only be part of an approval workflow or otherwise need access to CLM without also having day-to-day responsibilities in the system.

User Accounts, cont.



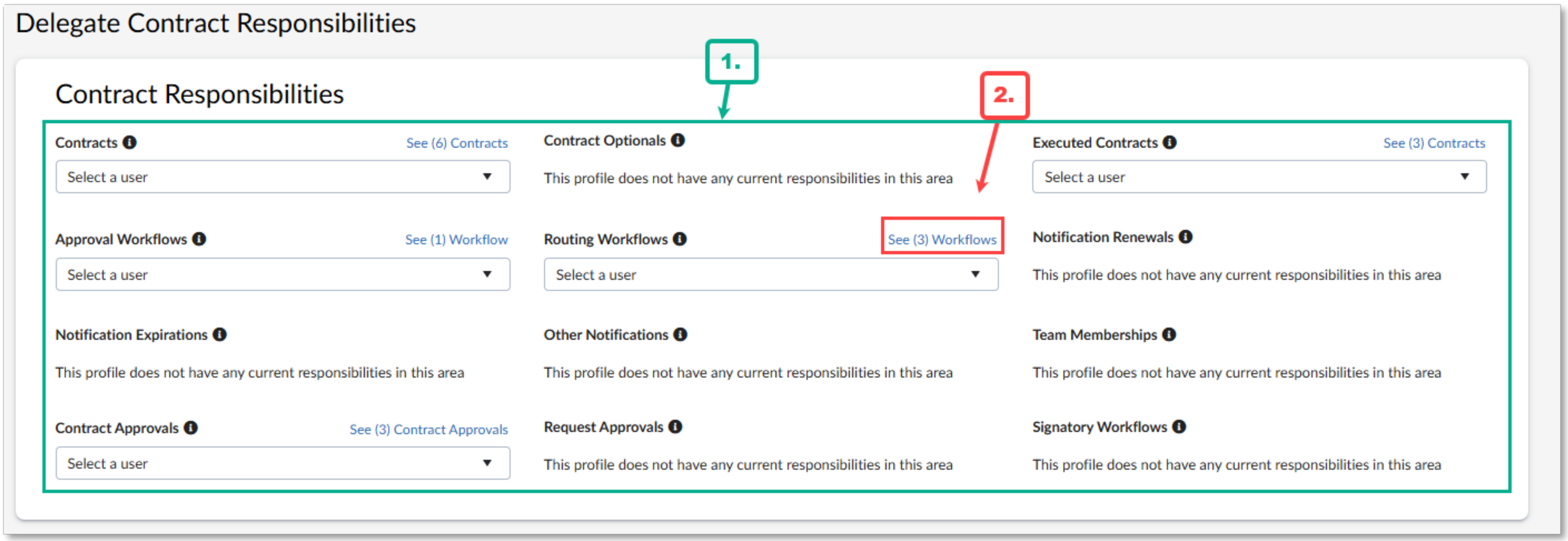
4. You can turn users' roles on and off in this screen. Access to contracts by region, department, and contract category are also defined here.

Located just below Contract Roles in the user's profile is **Contract Responsibilities**. Here you can view all the user's responsibilities for various contracts, membership in workflows, and more.



User Accounts, cont.

If a user is out of office for several days, or if they leave the organization, Administrators can reassign the user's roles in contracts, places in workflows, and team memberships temporarily by using **Delegate Responsibilities**.



1. All responsibilities are shown for this user, with drop-down menus to choose the user to whom the responsibility will be delegated.
2. For each responsibility item, you can click the associated hyperlink to view the contracts or other items the user is responsible for.

ADMINISTRATION

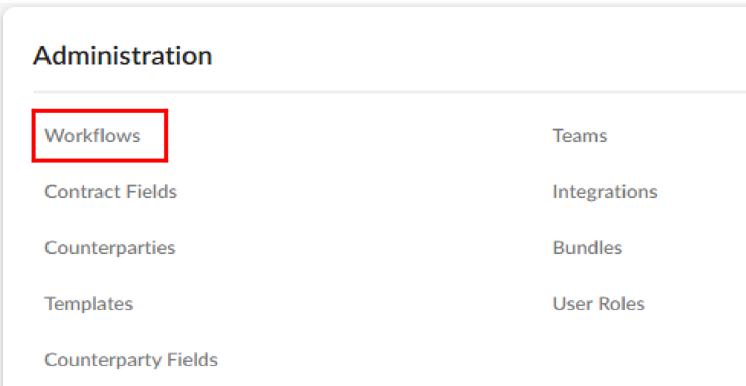
WORKFLOWS

There are 3 types of workflows in CLM:

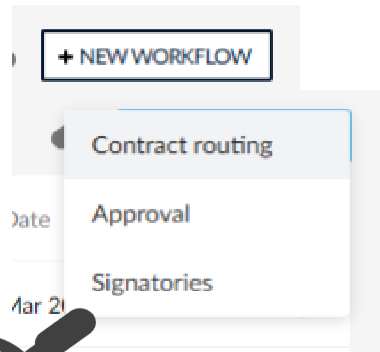
- **Approval**
- **Routing**
- **Signatories**

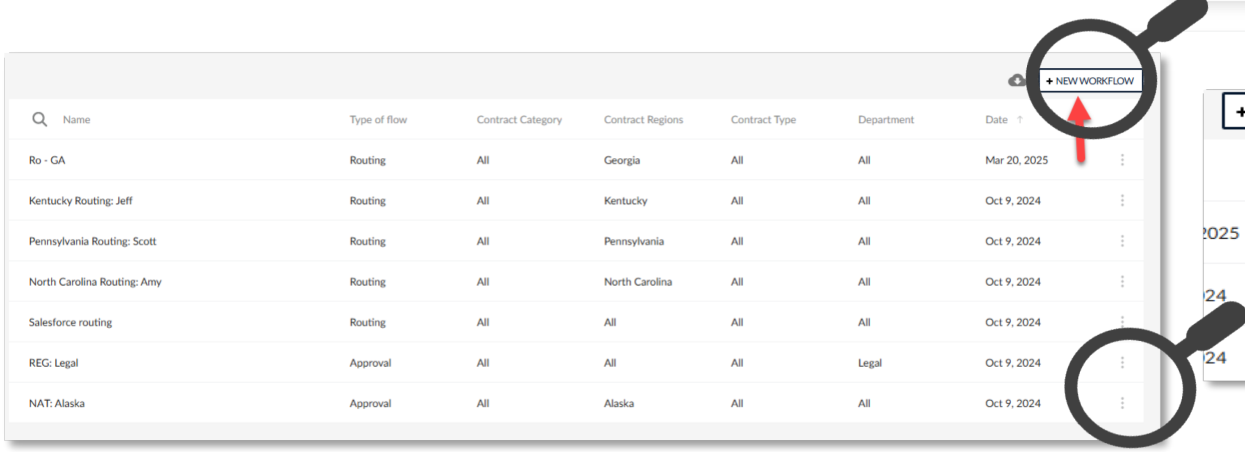
Approval workflows depend on *conditions* to activate, and routing workflows depend on *events*. Signatory workflows are different in that they only depend on which field settings are selected, and most clients use the signatories flow much less frequently than the approval or routing flows.

Access existing and new workflow setup from the administration panel in CounselLink.

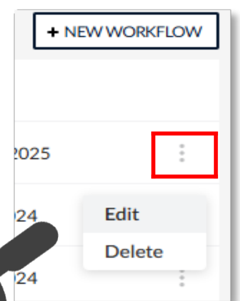


View existing workflows or create new ones here.





Name	Type of flow	Contract Category	Contract Regions	Contract Type	Department	Date
Ro - GA	Routing	All	Georgia	All	All	Mar 20, 2025
Kentucky Routing: Jeff	Routing	All	Kentucky	All	All	Oct 9, 2024
Pennsylvania Routing: Scott	Routing	All	Pennsylvania	All	All	Oct 9, 2024
North Carolina Routing: Amy	Routing	All	North Carolina	All	All	Oct 9, 2024
Salesforce routing	Routing	All	All	All	All	Oct 9, 2024
REG: Legal	Approval	All	All	All	Legal	Oct 9, 2024
NAT: Alaska	Approval	All	Alaska	All	All	Oct 9, 2024



Editing existing workflows by clicking the vertical dots at the end of the workflow and then select **Edit** or **Delete**.

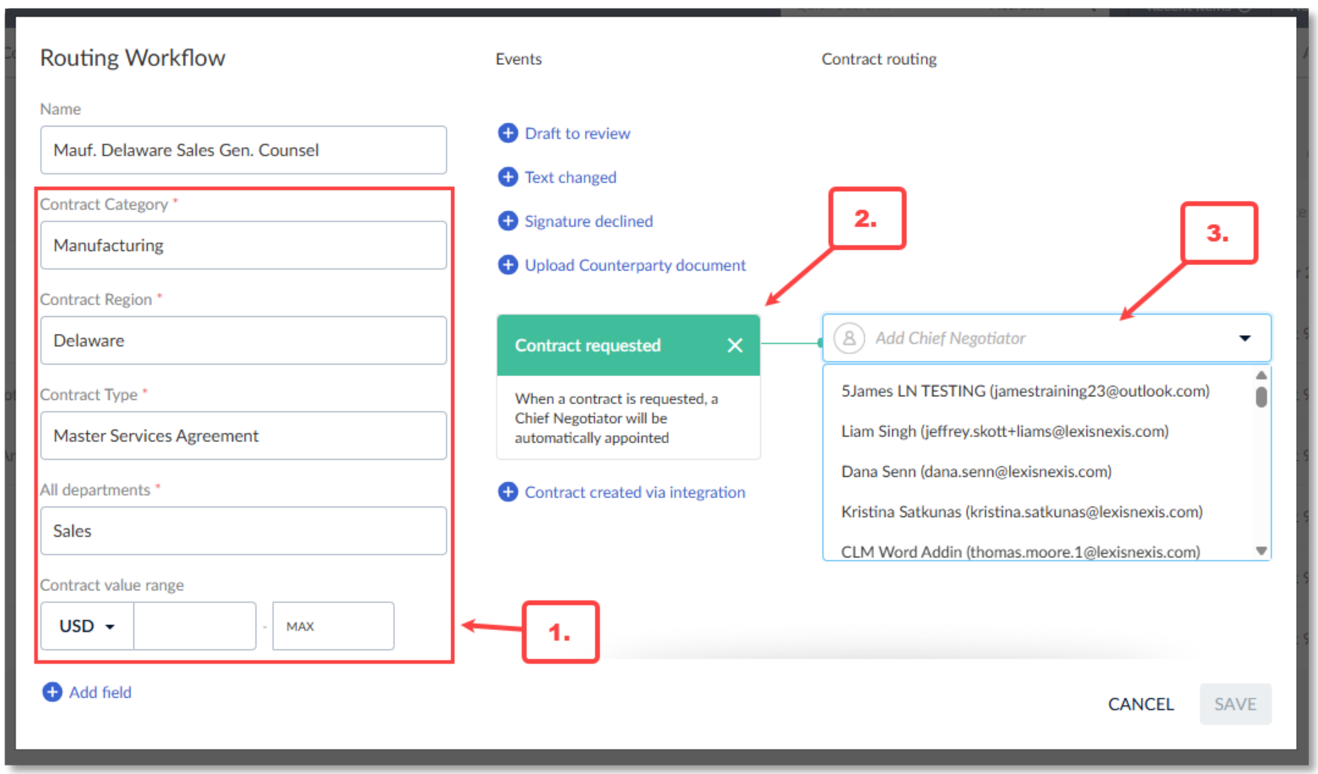
Routing Workflows

These are the events that can trigger a routing workflow:

- Draft to review
- Text changed
- Signature declined
- Contract requested
- Contract created via integration

You may select one or many events and associated users to receive notifications when the event is triggered. You may also set up one or many routing workflows, with different trigger criteria, as configured in the custom field section.

1. Custom fields section. Choices here inform when the workflow will be triggered. In the shown example, the criteria that will trigger this workflow is that of a new request that is for the **Manufacturing category**, in the **Delaware region**, of the **contract type Master Service Agreement**, for the **Sales department** for any **monetary value.**
2. The event that initiates this workflow is a new request. A chief Negotiator will be assigned to work on the request, based on the criteria selected in custom fields (#1).
3. Choose a Chief Negotiator from the drop-down list of users in CLM with that role.



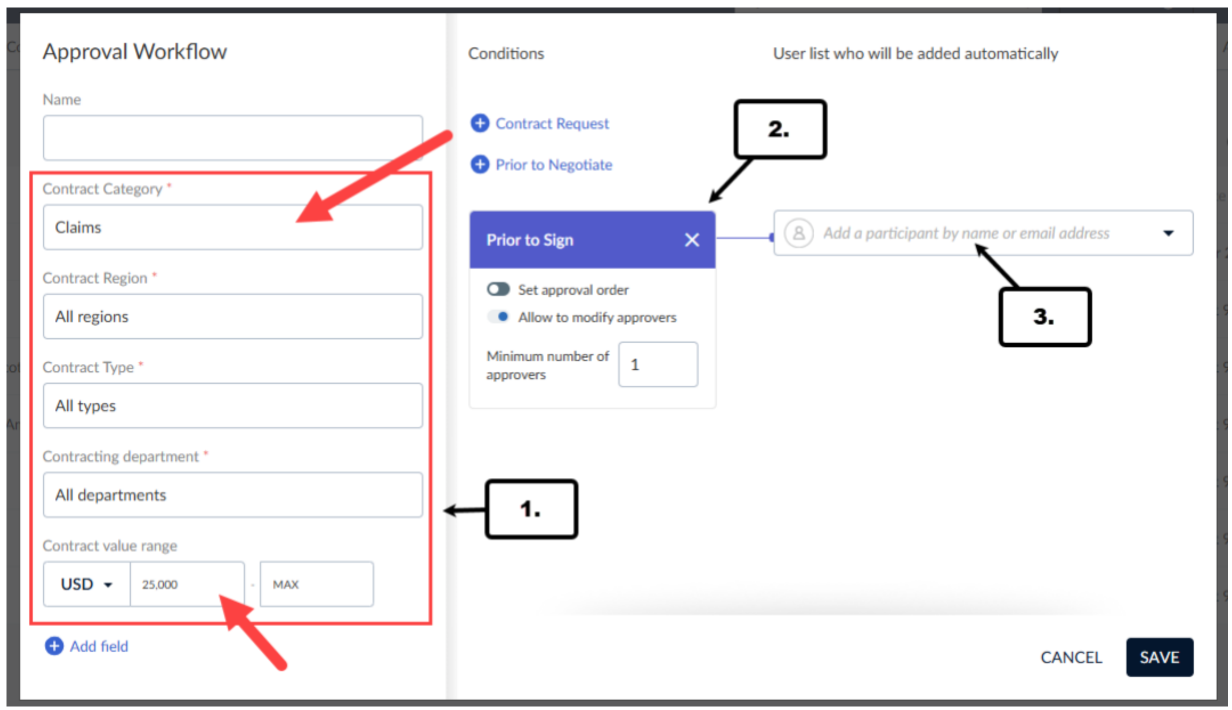
Approval Workflows

These are the conditions that can trigger a routing workflow:

- Contract Request
- Prior to Negotiate
- Prior to Sign

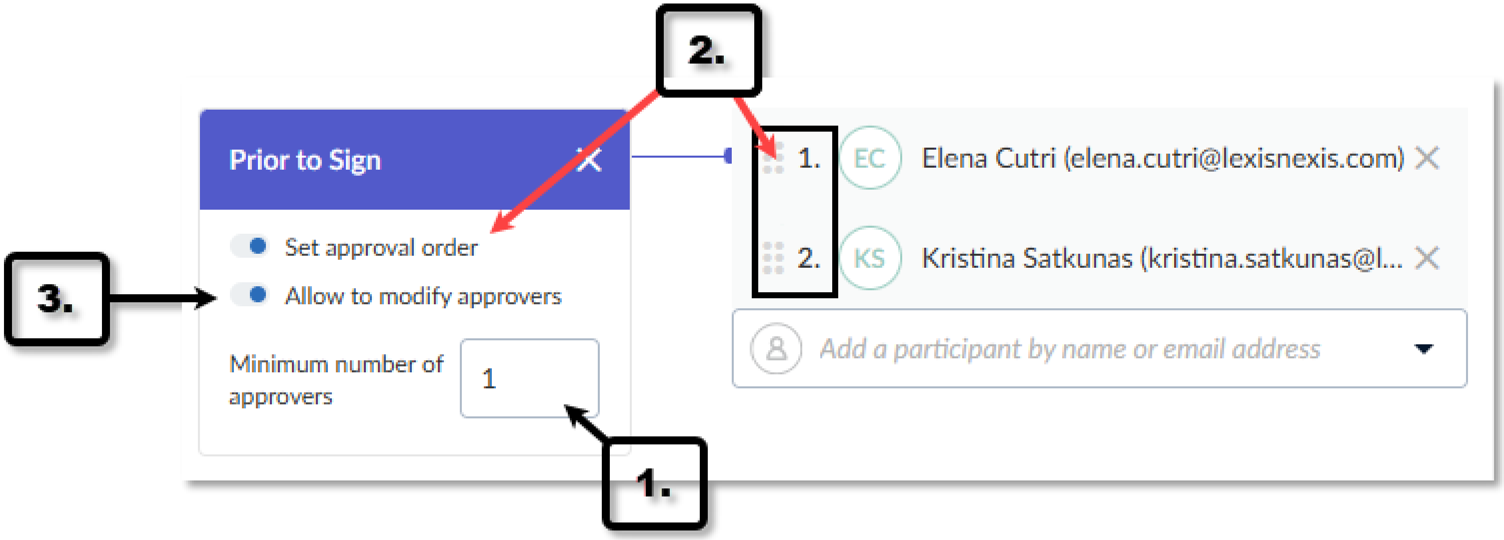
You may select one or many conditions and associated users to provide approvals when the condition is triggered. You may also set up one or many approval workflows, with different trigger criteria, as configured in the custom field section.

1. Custom fields section. Choices here inform when the workflow will be triggered. In the shown example, the criteria that will trigger this workflow is a contract with the **category: Claims**, of a **monetary value of $25k or greater**.
2. The condition that initiates this workflow is when a contract is in **the Negotiate stage, prior to Signing**. Signing can not take place until the approval has been attained.
3. Choose any user in CLM to provide approval. User with any or no global roles may be chosen.



The *Prior to Sign* Condition

This condition has extra configurations related to the number of approvers and the sequencing of an approval by 2 or more users. The number of approvers and the order in which they must approve the contract can be configured for this condition. You can also allow the chief negotiator for a contract to choose to modify the approvers on a per contract basis, or you can remove this option if you wish to enforce a stricter approval policy that does not allow for any changes to approvers.



1. Selecting a minimum number of approvers ensures that at least that number of the selected approvers must provide their approval(s) before the contract can proceed. For example, if the minimum number of approvers is set to 1, but there are 3 approvers selected, then any one of the three configured approvers may provide the approval, and the contract will move forward.
2. *Set Approval Order* can be toggled on or off. When it is turned on, the approvers are numbered in the order in which they must approve the contract (shown). When it is turned off, all approvers receive the notification to approve the condition in the contract simultaneously. The first approver to do so satisfies the condition and the contract will move forward.
3. When *Allow to Modify Approvers* is toggled on, *Minimum Number of Approvers* field appears, and a minimum number of approvers can be set. This allows the chief negotiator to make decisions on a per contract basis as to any changes in approvers, e.g., changing the approver or adding additional approvers. As long as the minimum number of approvers required is met, this will be allowed at the contract level.

A closer look: APPROVAL WORKFLOWS Cont.

Approval Steps in the Contract

Depending on the condition that has been set for the approval, the approval step will appear in the contract stages area in the correct order. In the image (fig.1), the approval condition is *Prior to Sign*. The chief negotiator will click **Approval** to activate the process.

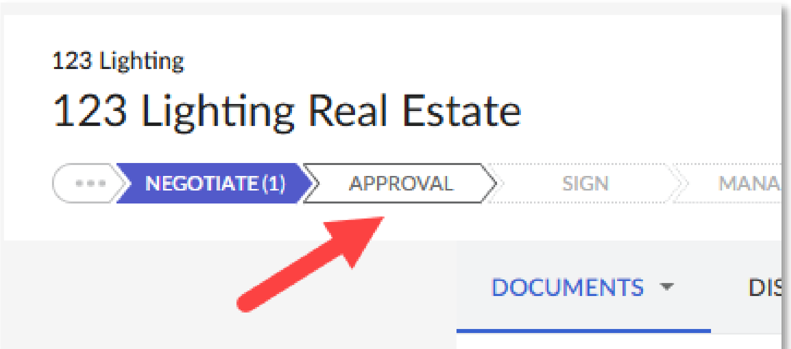
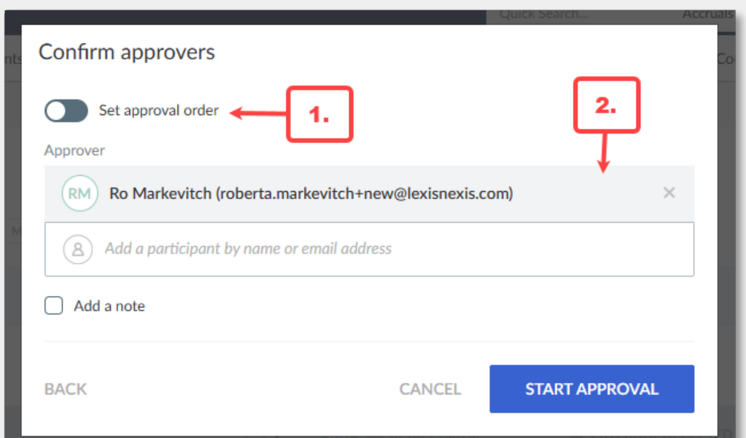
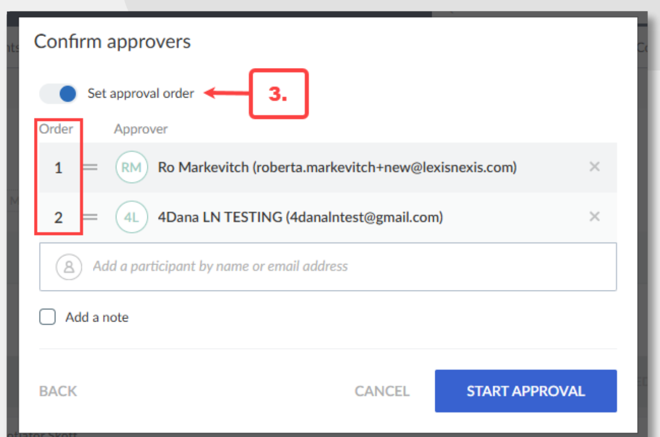
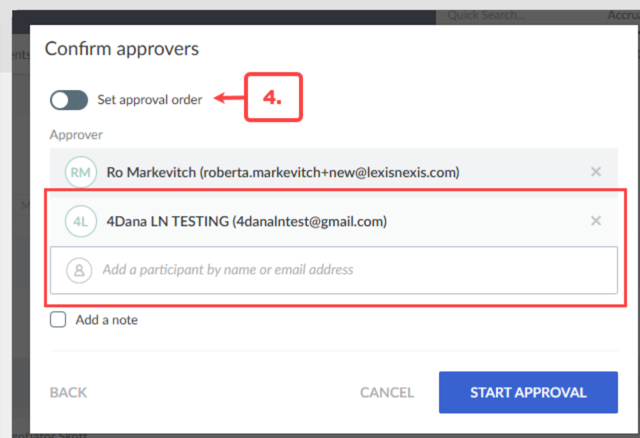


fig.1

1. When the workflow is configured for a single, specific approver the *Set Approval Order* toggle will default to off at the contract level.
2. The default approver that was set up in the workflow will appear here.
3. Chief negotiator may toggle on *Set Approval Order*. Then when additional approvers are added, they are numbered in the order that the approval notification will be sent.
4. If *Set Approval Order* is toggled off, but there is more than one approver configured, then both approvers will receive the approval notification simultaneously. The first user to issue approval will complete the requirement and the contract will move forward.







CUSTOM FIELDS

Custom Fields Description and Functions

There are 3 main areas where custom fields can be created:

- Summary
- Post-execution
- Contract Request

Fields created in **Summary** will appear in a new contract data intake form. When chief negotiators or contract managers create a new contract, these fields that appear in the form. Related fields and linked data inputs will appear in the correct logical places as well, depending on how fields have been configured.

There are 4 pre-defined fields available in Summary:

- Region
- Department
- Category
- Type

Fields created in **Post-Execution** will be available to manage a contract, once it has completed the *Sign* stage. Extractive AI is available as a choice for Post-Execution fields; the AI will auto select data from the contract to fill the fields.

There are 3 pre-defined data fields available in Post-Execution:

- Auto-renewal
- Subsequent Term (months)
- Notice of Non-renewal

Fields created in **Contract Request** will appear in the new request intake form. Like the Summary data in a new contract form, the fields in the new request form also contain related fields and linked data inputs, depending on the field configurations. There are no pre-defined fields in Contract Request. It is best practice to duplicate the fields, relations, and linking from the Summary section in the Request section. This ensures that all data from the request intake form parses over to the metadata for the contract, once it's in progress.

Where do Custom Fields Appear?

Custom fields are an integral part of CLM functionality; many key features require custom fields to function correctly.

The following CLM functions rely on custom fields:

- User account access
- New request intake form
- New contract intake form
- Workflows
- Template access and input fields

CUSTOM FIELDS

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