



Contract Lifecycle Management (CLM) Quick Reference Guide

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.



The screenshot shows the CounselLink+ interface. The top navigation bar includes links like Home, Intakes, Matters, Invoices, Legal Holds, Contacts, Law Firms, Documents, Calendar, User Search, Info Center, Reports, New Analytics Console, and a highlighted 'In Progress Contracts' link (callout 1). Below this is a search bar for 'In-progress contracts' (callout 6) and buttons for '+ NEW CONTRACT' and '+ NEW REQUEST' (callout 2). A dropdown menu for 'In-progress (435)' is shown with a settings gear icon (callout 3). On the left, a list of contract titles is displayed, with 'NEW' tags for '123 Lighting Manufacturing' and 'Abbott' (callout 4). A 'REQUEST' button is shown below the list (callout 5). The main table displays contract details with columns: Counterparty, Chief Negotiator, Stage, Last Activity, and Value. The table contains several rows of data, including '123 Lighting', 'Abbott', 'ABC', 'xYZ', and '123 Lighting' with various stages like 'Negotiate', 'Draft', 'Request', and 'Approval'.

Counterparty	Chief Negotiator	Stage	Last Activity	Value
123 Lighting	Amy Nelson	Negotiate	Apr 10, 2025 11:34 AM	
Abbott	Scott Duffy	Negotiate	Apr 9, 2025 3:17 PM	USD 250,000.00
ABC	Ro Markevitch	Negotiate	Apr 8, 2025 11:20 AM	
xYZ	Ro Markevitch	Draft	Apr 7, 2025 2:03 PM	
	Amy Nelson	Request	Apr 7, 2025 1:58 PM	
123 Lighting	Ro Markevitch	Approval	Apr 7, 2025 1:27 PM	

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.



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 to 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.

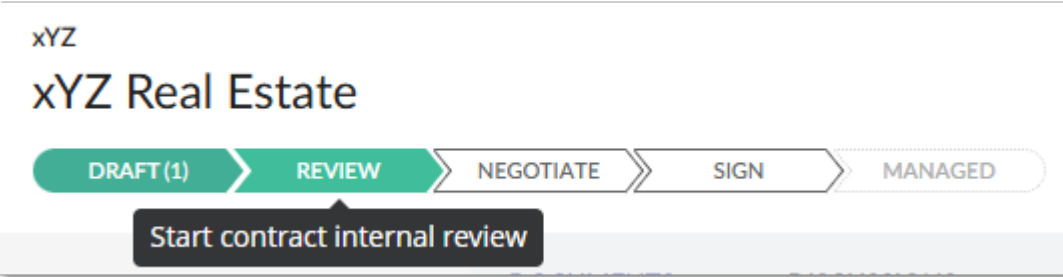
WORKING IN A CONTRACT

A closer look: STAGES



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

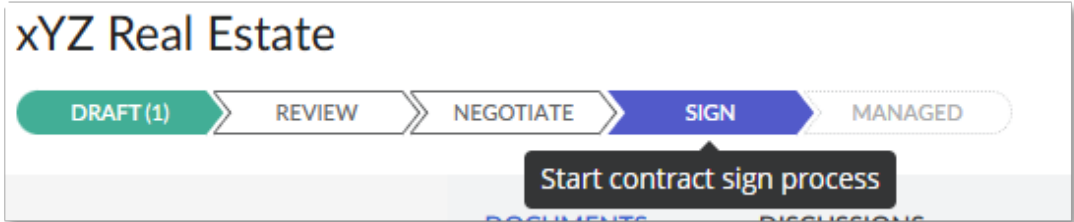
Draft is the initial stage of a new contract. Correct any formatting, etc. at this stage before beginning to work on the contract.



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 work 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.

WORKING IN A CONTRACT

A closer look:

CONTRACT CONTROLS & AUDIT TRAIL

Audit trail

Online negotiation started

Ro Markevitch, Apr 11, 2025 4:09 PM

Email sent to:
some@one.com - Negotiator

Documents:
[Land Purchase Agreement.docx](#)

Document was edited

Ro Markevitch, Apr 7, 2025 2:03 PM

Document name: *Land Purchase Agreement.docx*

Contract created

Ro Markevitch, Apr 7, 2025 2:03 PM

Document uploaded

Ro Markevitch, Apr 7, 2025 2:01 PM

Document name: *Land Purchase Agreement.docx*

Contract request was created

Ro Markevitch, Apr 7, 2025 2:01 PM

Request is assigned to: *roberta.markevitch+new@lexisnexis.com*

DOWNLOAD

CANCEL

Contract Info

Request Details

Requester
Ro Markevitch (roberta.markevitch+new@lexisnexis.com)

Counterparty organization *
xyz

Counterparty Chief Negotiator *
zzz

Region
Georgia

Department
Facilities Management

Category

CANCEL

SAVE

Cancel contract

Delete contract

Download documents

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).

WORKING IN A CONTRACT

A closer look:

Sharing Internally



CounselLink+

Quick Search...

Matters

Recent Items

Notifications

Marked

Home

Intakes

Matters

Invoices

Legal Holds

Contacts

Law Firms

Documents

Calendar

User Search

Info Center

Reports

New Analytics Console

In Progress Contracts

Executed Contracts

All Pages

Abbott USD 1,275,000.00

Abbott Manufacturing Agreement

REVIEW (1)

NEGOTIATE

SIGN

MANAGED

DOCUMENTS

DISCUSSIONS

All markup

Pending

Accepted

+ NEW DOCUMENT

Manufacturing Agreement US

REVIEW

SD JD

SHARE

SD JD

SHARE

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 <i>internal</i> 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	

Quick Search...

Matters

Recent Items

Notif

Add internal users and assign roles for internal review of document "Manufacturing Agreement US".

8

Add a participant by name or email address

Tax Team (1 member)

Finance Team (1 member)

Information Security Team (1 member)

Operations Team (1 member)

Legal Team (4 members)

Jane Doe (yevhen.uvin+janerequester@parleypro.com)

Amy Nelson (amy.nelson@lexisnexis.com)

Matthew Lung (matthew.lung@lexisnexis.com)

This Manufacturing Agreement ("**Agreement**") is made on this (the "**Effective Date**"), by



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.

The screenshot shows a contract clause editor interface. At the top, a clause is displayed: "a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller ~~at the Close of Escrow~~. Prior to close." Redline text is shown in blue. Below the clause is a comment box containing the text "Please review". At the bottom of the interface are three radio button options: "Internal" (selected), "Queued", and "External". To the right of these options is a "POST" button. Four red boxes with numbers 1 through 4 point to specific elements: 1 points to the redline text, 2 points to the new blue text "Prior to close", 3 points to the comment box, and 4 points to the "Internal" radio button.

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.

a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller ~~at the Close of Escrow~~Prior to close.

b. Seller intends that the difference between the fair market value of the Property and the Purchase Price will be a charitable contribution to Buyer (the "Charitable Contribution"). Buyer agrees to cooperate with Seller, its legal counsel, and accountants with regards to the Charitable Contribution as provided in Section 16(b) below.

c. Deposit. Buyer shall deposit in Escrow with the Title Company (as defined below) a good faith deposit of XXX Dollars (\$XXX) (the "Deposit") on or before five days from the execution of this Agreement. The Deposit shall be invested by the Title Company in a separate, federally-insured, interest-bearing trust account acceptable to Buyer and all interest accrued thereon shall be for Buyer's account. The term "Deposit" shall include any interest earned thereon. The Deposit shall be fully refundable up to the expiration of the Contingency Period as described below. The Deposit shall apply to the Purchase Price and act as Liquidated Damages as provided in Section 10. If this Agreement terminates before the Close of Escrow for any reason other than a default by Buyer, the Deposit shall be returned by the Title Company to Buyer without the need for further instruction to do so, and Buyer shall have no further obligation to purchase the Property.

d. Personal Property. Seller does not intend to transfer any personal property in connection with the sale contemplated herein.

e. Right to Crops. Seller shall have the right to operate harvest, and receive crop proceeds for the entire 2020-2021 crop season for the crops grown on the Property as of the Effective Date. At

ORIGINAL TEXT

a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller at the Close of Escrow.

RM

Ro Markevitch

Apr 16, 2025 10:05 AM

INTERNAL

a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller ~~at the Close of Escrow~~Prior to close.

Please review

MAKE EXTERNAL

MAKE QUEUED

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.

CounselLink+

HomeIntakesMattersInvoicesLegal HoldsContactsLaw FirmsDocumentsCalendarUser SearchIn

DOCUMENTS

DISCUSSIONS

Land Purchase Agreement

NEGOTIATE

2

REAL ESTATE PURCHASE AGREEMENT

Discussions Page “Accordion” View

DOCUMENTS

DISCUSSIONS

1.

All (2)By relevance

Discussions	Posts	Last activity	Stage	Actions
▼ This Agreement when executed by Buyer and Seller...	1	RM Apr 16, 2025 10:02 AM	INTERNAL	
^ a. Purchase Price. The cash Purch...	1	RM Apr 16, 2025 10:05 AM	INTERNAL	

GO TO DOCUMENT

ORIGINAL TEXT

a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller at the Close of Escrow.

RM Ro Markevitch Apr 16, 2025 10:05 AM

INTERNAL

a. Purchase Price. The cash Purchase Price ("Purchase Price") for the Property shall be fifty percent of XXX Dollars (\$XXX), which shall be paid to the Seller ~~at the Close of Escrow~~ Prior to close.

Please review

MAKE EXTERNAL

MAKE QUEUED

4.

Propose text change or a comment...

POST

DISCARD DISCUSSION

- 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.

- 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.

The screenshot shows a 'Contract Request' form with the following fields: Request title (text input), Counterparty organization (text input with placeholder 'Enter counterparty organization'), Counterparty Chief Negotiator (text input with placeholder 'Enter counterparty chief negotiator'), Region (dropdown menu with 'Select region'), Department (dropdown menu with 'Select department'), Category (dropdown menu with 'Select category'), Type (text input with 'Select type'), Reg. or Nat? (dropdown menu with 'Select reg. or nat?'), and Send directly for signature? (dropdown menu with 'Select send directly for signature?'). At the bottom are 'CANCEL' and 'CREATE REQUEST' buttons.

Fig. 1: Example of a typical request form

The screenshot shows the 'Add Documents' section with three tabs: 'Upload document' (selected), 'Select template', and 'Upload attachment'. Below the tabs are two columns: 'My Team documents' and 'Counterparty documents'. Each column has a description and a dashed box with a document icon and an upward arrow. Below each column is a button: 'UPLOAD MY TEAM DOCUMENTS' (green) and 'UPLOAD COUNTERPARTY DOCUMENTS' (blue). A red box labeled '1.' points to the tabs, and a red box labeled '2.' points to the two upload buttons.

Fig. 2

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



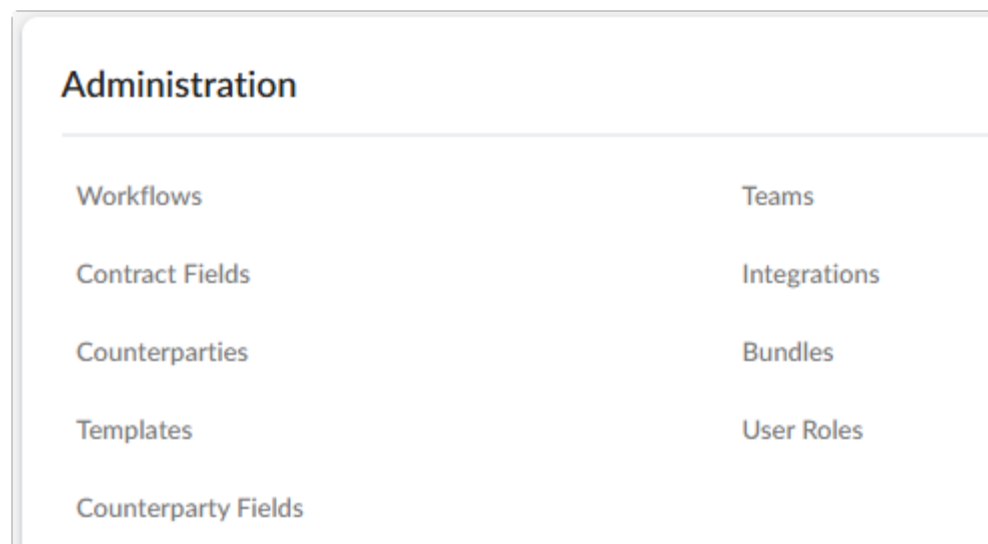
The Administrator user role in CLM can perform the following task in the system:

- 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.



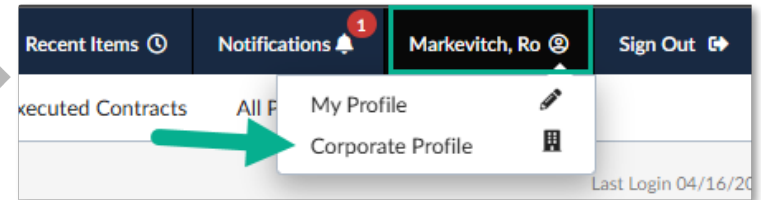
IMPORTANT NOTE:

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".



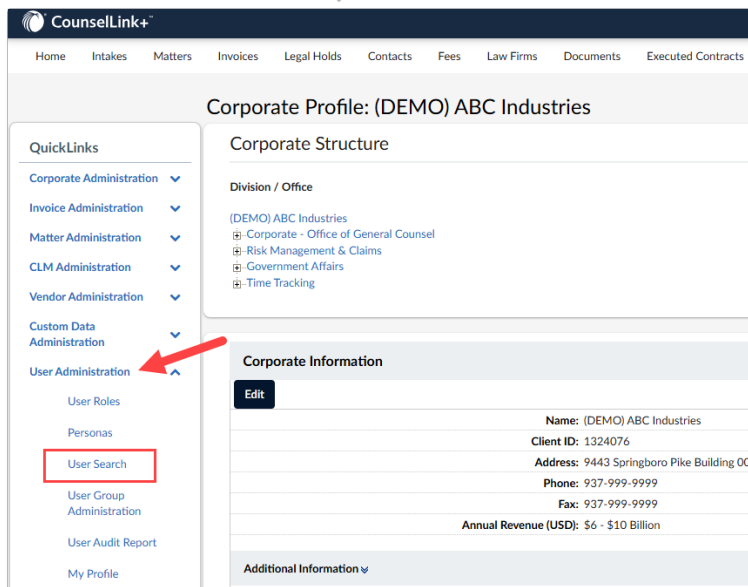
1.

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.



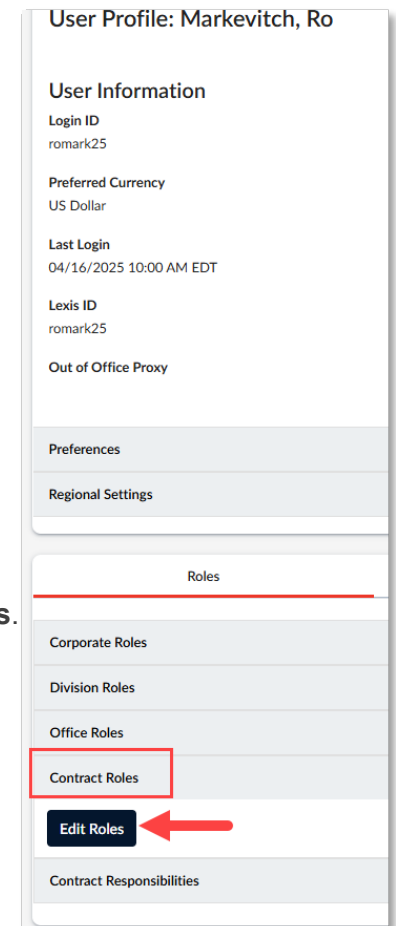
2.

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.



Contract Roles

Check All Uncheck All

☒ Chief Negotiator ⓘ

Region: All items selected ×

Contract category:

Department: All items selected ×

☒ Contract Manager ⓘ

Region: All items selected ×

Department: All items selected ×

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.

Contract Responsibilities

Delegate Responsibilities

Contracts	Contract Options	Executed Contracts	Approval Workflows	Routing Workflows	Notification Renewals	
- MSA - Manufacturing Agreement - Manufacturing Agreement - Manufacturing Agreement - Sky...	This profile does not have any current responsibilities in this area	- NDA - Manufacturing Agreement - He... - Contrato Examen	Manufacturing Agreement - Legal	- Manufacturing Agreement - Manufacturing Agreement - Legal - MSA	This profile does not have any current responsibilities in this area	N T c
See More						



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**.



Delegate Contract Responsibilities

Contract Responsibilities

Contracts ⓘ [See \(6\) Contracts](#)
Select a user ▼

Approval Workflows ⓘ [See \(1\) Workflow](#)
Select a user ▼

Notification Expirations ⓘ
This profile does not have any current responsibilities in this area

Contract Approvals ⓘ [See \(3\) Contract Approvals](#)
Select a user ▼

Contract Optionals ⓘ
This profile does not have any current responsibilities in this area

Routing Workflows ⓘ [See \(3\) Workflows](#)
Select a user ▼

Other Notifications ⓘ
This profile does not have any current responsibilities in this area

Request Approvals ⓘ
This profile does not have any current responsibilities in this area

Executed Contracts ⓘ [See \(3\) Contracts](#)
Select a user ▼

Notification Renewals ⓘ
This profile does not have any current responsibilities in this area

Team Memberships ⓘ
This profile does not have any current responsibilities in this area

Signatory Workflows ⓘ
This profile does not have any current responsibilities in this area

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.

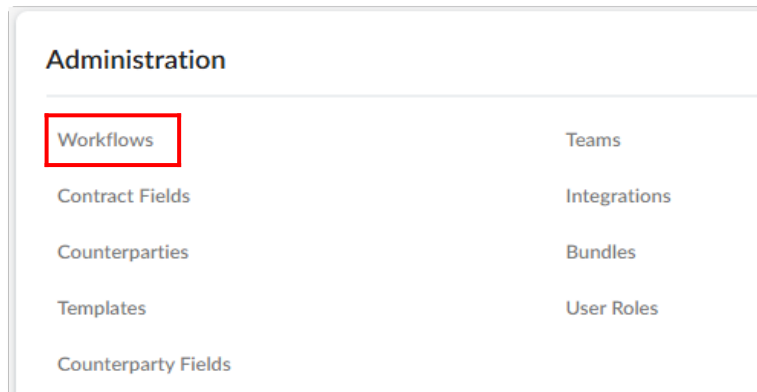


There are 3 types of workflows in CLM:

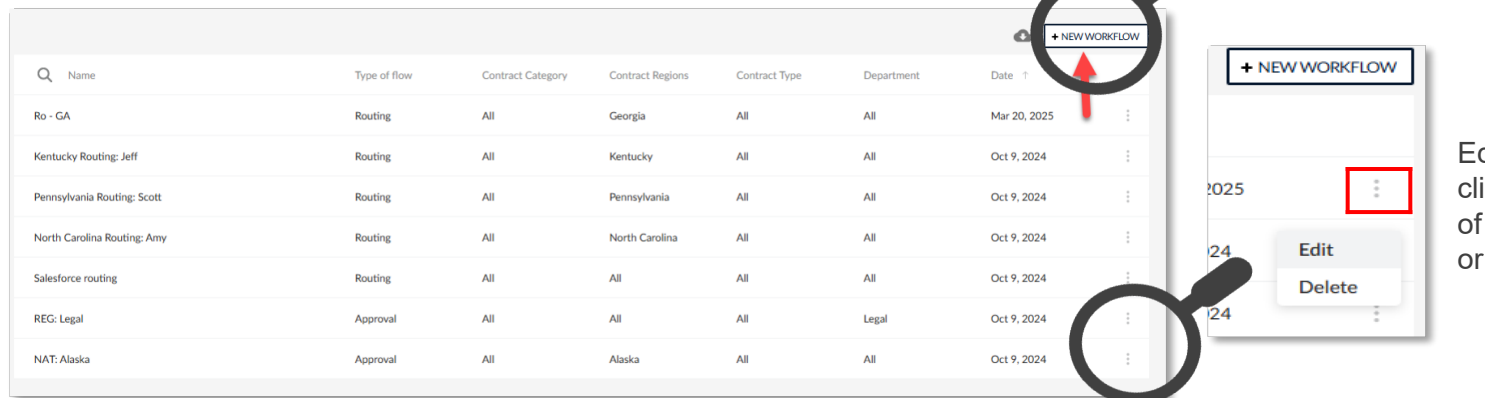
- **Approval**
- **Routing**
- **Signatories**

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.



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.

Routing Workflow

Name
Mauf. Delaware Sales Gen. Counsel

Contract Category *
Manufacturing

Contract Region *
Delaware

Contract Type *
Master Services Agreement

All departments *
Sales

Contract value range
USD - MAX

Events

- + Draft to review
- + Text changed
- + Signature declined
- + Upload Counterparty document
- Contract requested** (highlighted)
- + Contract created via integration

Contract routing

Contract requested (highlighted)
When a contract is requested, a Chief Negotiator will be automatically appointed

Add Chief Negotiator (dropdown menu)
5James LN TESTING (jamestraining23@outlook.com)
Liam Singh (jeffrey.skott+liams@lexisnexis.com)
Dana Senn (dana.senn@lexisnexis.com)
Kristina Satkunas (kristina.satkunas@lexisnexis.com)
CLM Word Addin (thomas.moore.1@lexisnexis.com)

1. (points to Contract Category field)
2. (points to Contract requested event)
3. (points to Add Chief Negotiator dropdown menu)

+ Add field

CANCEL SAVE



Approval Workflows

These are the conditions that can trigger a routing workflow:

- Contract Request
- Prior to Negotiate
- Prior to Sign

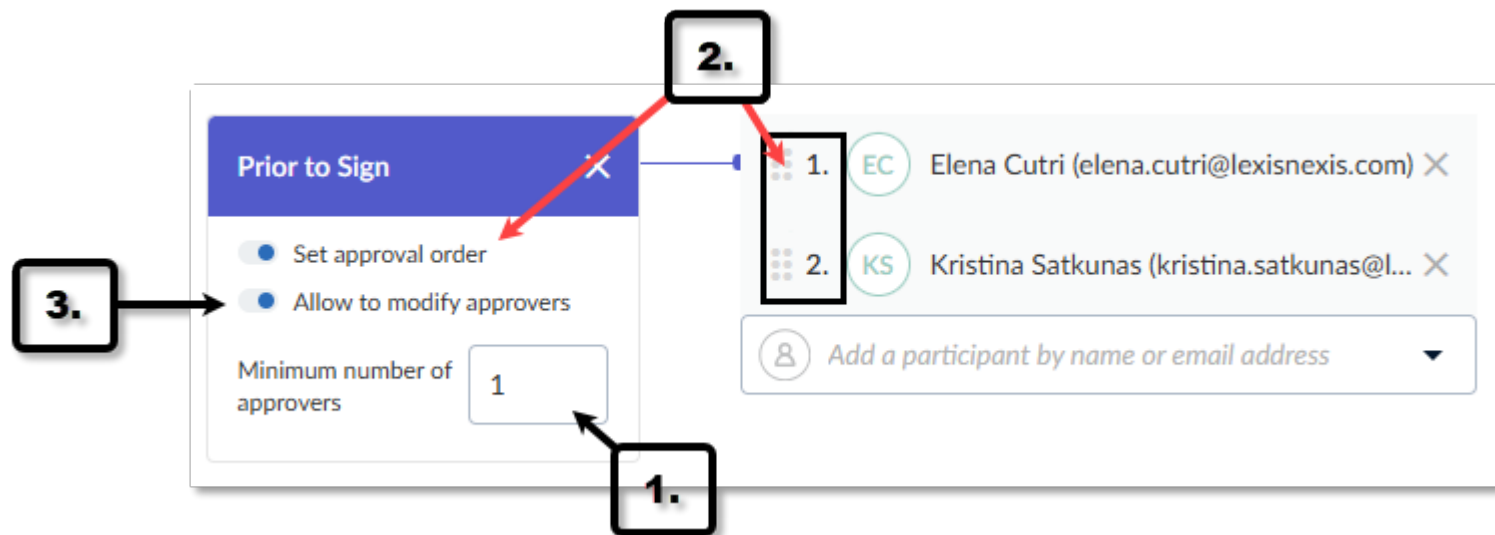
You may select one or many conditions and associated users to provide approvals when the condition is triggered. You may also set up one or many approval workflows, with different trigger criteria, as configured in the custom field section.

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.

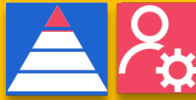


The *Prior to Sign* Condition

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.



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.

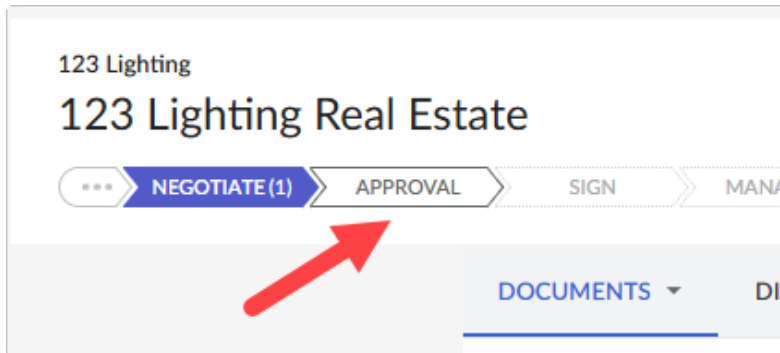


fig.1

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.

Confirm approvers

☐ Set approval order

Approver

RM Ro Markevitch (roberta.markevitch+new@lexisnexis.com)

☐ Add a note

BACK CANCEL START APPROVAL

Confirm approvers

☒ Set approval order

Order	Approver
1	RM Ro Markevitch (roberta.markevitch+new@lexisnexis.com)
2	4L 4Dana LN TESTING (4danalntest@gmail.com)

☐ Add a note

BACK CANCEL START APPROVAL

Confirm approvers

☐ Set approval order

Approver

RM Ro Markevitch (roberta.markevitch+new@lexisnexis.com)

4L 4Dana LN TESTING (4danalntest@gmail.com)

☐ Add a note

BACK CANCEL START APPROVAL



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



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