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**CONTRACT LIFECYCLE
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**COLLABORATION
& AUTOMATION**



**BUSINESS PROCESS
MANAGEMENT**

ContractWorks Makes It Easy to Manage, Create, and Sign Contracts from Anywhere While Providing Increased Contract Visibility and Reduced Risk

“ContractWorks has been a versatile solution for our company to cope with growing contract management demands. I have been especially impressed with the intuitive and easy-to-use interface which makes it easy to train new staff. ContractWorks has delivered the value proposition that we were seeking.”

Louis Belzil
General Counsel, Tier 1 Energy Solutions

Company Name Brand
SecureDocs, Inc.

Product Name Brand
ContractWorks

Latest Developments and Updates

- Improvements to the user interface (UI) bring a modern look to the web-based software giving users greater control over the data displayed and bringing key information to the forefront such as a snapshot of effective dates.
- Documents are managed with action controls that attach documents together and quickly delete, duplicate, and move files and folders.
- The built-in electronic signature tool helps organizations quickly sign agreements from anywhere.
- Contract metadata extraction is powered by artificial intelligence and onboarding services speed up the initial setup and implementation of ContractWorks.

Centralized Contract Management

If you want greater insight into where your contracts are, what is inside of them, and

how to get contracts signed electronically, check out ContractWorks. The web-based software puts all your documents into a **central repository** that establishes a single source of truth and enables you to effectively manage, track, and report on contracts and the signing process.

ContractWorks is not out to replace Microsoft Word or other contract drafting and redlining tools. The software aims to complement existing software with a reliable, familiar, and easy-to-use tool. The customizable, folder-based UI allows you to structure your system and folders however you want and provides many views including contracts in the pipeline and by department as well as track signatures in progress. While system navigation is based in English, it also supports tagging and storage of multi-lingual contracts . *See Figure 1.*

Applied Intelligence

ContractWorks supports drag-and-drop functionality to get files and folders into the central repository. It can receive scanned input directly from Fujitsu ScanSnap

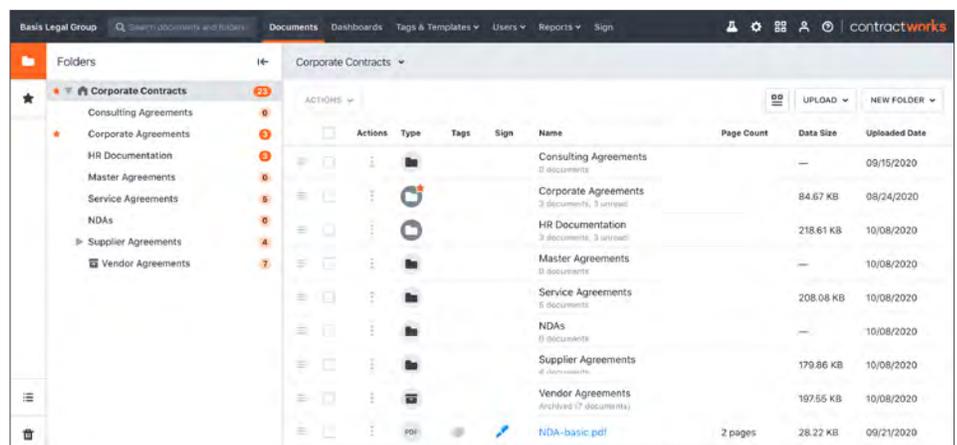


Figure 1: ContractWorks displays functions in menus across the top of the web-based UI. Contracts in folder hierarchies are reminiscent of Microsoft Explorer and Apple’s Finder.

“ I like the simplicity with which you can start using the program. Just drag and drop your existing contracts into the program and you’re already on your way.”

Kent Schoen

General Counsel, BlueChip Financial

scanners. When you upload files and folders to ContractWorks, the software converts files to PDFs and renders them in HTML. The conversion process uses artificial intelligence (AI) to extract metadata and uses an optical character recognition (OCR) engine to make all content searchable. When you download files, ContractWorks delivers them in their native format, Microsoft Word, or another format.

The ContractWorks AI extracts metadata and associates it with tags to search, track, and report contracts. It builds a cover sheet detailing metadata tags such as agreement type, parties, start and end date, and governing law. *See Figure 2.*

Tag Team Back Again

Many options are available from the cover sheet. You can edit or add metadata tags, download the document, send it out for signature, or open it to review and search.

ContractWorks alerts you to critical contract events and notifies you via email from @contractworks.com when end dates or renewal dates come up on the calendar. You can configure the number of days to trigger an alert for any tag using a date field.

If you have numerous tags, it can become challenging to consistently group tags to effectively track and report on contract types. ContractWorks alleviates that by using tag templates to group tags

according to contract type which can reduce the complexity and necessity of tracking and reporting all tags in all contracts. For example, tags for a nondisclosure agreement will be different than tags for a master service agreement.

The ContractWorks AI builds an outline view of every contract based on the contract structure. The software pulls section headers, sub-headers, and more to form an interactive outline that allows you to quickly navigate a contract. You can open a contract and search for all instances of keywords and you can navigate sections and clauses using a fly-out panel that is similar to Microsoft’s Navigation pane.

Once you find relevant information in a contract, you can highlight it in color and can then associate it with an existing tag, or create a new label and format such as text, currency, date, duration, number, and percentage. New tags appear in the cover sheet with others that ContractWorks automatically identifies.

ContractWorks brings a whole new meaning to manual tagging because it is easy. Once you create a tag to track and report, that tag becomes an option when reviewing and tagging other contracts. The system will not, however, learn to automatically identify and associate text from manual tags for future document uploads.

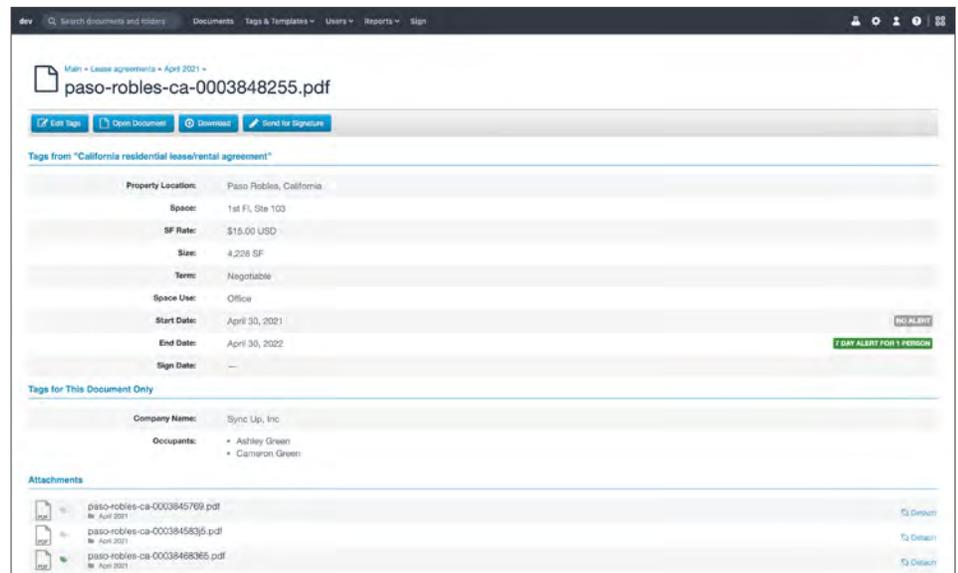


Figure 2: ContractWorks AI automatically extracts contract metadata, adds tags, and builds a cover sheet with a document’s pertinent details that provides contract benefits, burdens, and effective dates.

“ Not only is ContractWorks fairly priced, but their system is user-friendly and continues to evolve, becoming more robust in its offerings. What sets them apart from their competitors is that they listen to their customers’ needs and wants and make updates accordingly.”

Lynn Towler
Senior Contracts Manager,
Shift4 Payments

No-Fuss Contract Signing

When you have a contract ready for signature, you can use ContractWorks to get signatures with its **built-in electronic signature feature**.

After opening a contract from the sign menu, the left panel allows you to add signers followed by a dialog box to select the signer’s name and email address as well as a CC field to copy additional stakeholders. Add signature, text, and date boxes where applicable in the document and it’s ready to send to single or multiple signers. To accommodate a specific signatory workflow, you can select the appropriate order or simply send it to all signers at once. When the executed version returns to the repository, the signed copies are automatically sent to all parties.

The signing process, or packet, includes status information on the requester, signers, and audit trails. Automatic reminders are sent on the third and seventh day after the package is sent and every seven days after that. In addition, you can send manual reminders on demand. *See Figure 3.*

Tagged templates let you generate new agreements and send them out for signatures. With a form-filling generation tool, tags appear for you to fill in data, select pull-down options, and pick dates. Filled information will populate throughout the contract wherever the variable repeats.

On creation, electronic signature packets include tagged information that is fully reportable in our reports viewer and customizable reports. You can find out how many contracts remain open and unsigned, who sent them out, and when. That reporting eliminates the need to use third-party signature tools with ContractWorks because electronic signatures and reporting are built in and included in your license.

Storage, Security, and Reporting

The cloud-based software offers a multitenant architecture in Amazon Web Services and stores all customer data in Amazon S3 in logically separate databases with unique encryption keys. Customer-managed keys are not supported.

Since the software allows unlimited numbers of users, security and access control are essential. ContractWorks supports single sign on (SSO) with SAML 2.0 and integrates with Active Directory. You can customize user permissions in the software with varying levels of role-based access across folders and subfolders—such as no access, view only, download, and full access.

The software includes standard reports to display audit logs, notifications, and contract aging. Run and save custom reports with ContractWorks using an **intuitive report interface** to filter by tagged information, select columnar data,

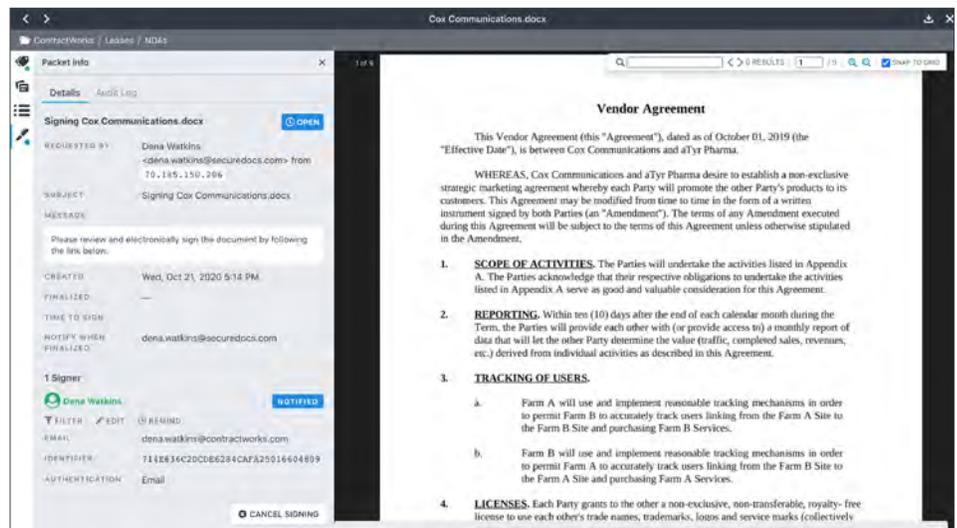


Figure 3: Signature Packet information for contract signatures includes an audit trail of who needs to sign the contract. You can replace any signers and add new signers to the packet as required.

and document details such as name, keyword, template, and folder. For example, a report could be generated to identify all contracts with an assignment or force majeure clause expiring within 180 days. Reports can be rerun manually in the following days to update information. Additionally, you can reduce the need for manual intervention and set reports to run automatically by scheduling them to be regularly published and sent to select users in Excel or PDF format. Reporting information from the system follows role-based security to limit reporting to contracts you can view and access.

Pricing

Pricing plans for ContractWorks are based on document tiers and include all contracts that are active and inactive in the system and accommodate unlimited users. The Standard package starts at \$600 per month, billed annually, and includes 2,500 documents and five e-signature licenses. The Professional package includes 10,000

documents and ten e-signature licenses. The Enterprise package includes unlimited documents and twenty e-signature licenses. All packages have all of the software features; however, SSO and Salesforce integrations are only available for the Professional and Enterprise licenses. ContractWorks offers free implementation support from an entire in-house team dedicated to onboarding clients. ContractWorks also provides an option for migration support to all customers via Cenza and a 10% discount to nonprofit organizations.

Who is SecureDocs?

SecureDocs, Inc. is based in Santa Barbara, California and makes and sells highly secure, quickly adopted, and affordable software including ContractWorks (contract management software), SecureDocs (virtual data room), and ReadySign (electronic signature) for businesses in the global marketplace. The company was spun out of AppFolio in 2012 and released

ContractWorks in 2015. ContractWorks manages more than ten million contracts with software availability that exceeds 99.998% uptime. The company's more than fifty employees support customers in more than sixty countries.

Why Buy ContractWorks?

- It is affordable, easy-to-use, out-of-the-box software to manage contracts and gain an immediate return on your investment.
- Get started managing contracts in minutes—not days, weeks, or even months.
- Store, organize, track, and report on contracts in a central repository with unlimited storage space.
- Set up and sign contracts anywhere with built-in e-signature.

See ContractWorks in Action

[Schedule a demo today](#) to learn more. ■

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