CLM Summer Release 2021

What's New

New AI Features

- CLM users can now import an executed contract into a Record without manually entering information.
 Simply select Store Executed Contract from the Action Menu and Onit's AI will process the contract (.pdf or .docx) and store the appropriate information. Once AI processing is complete, the user can navigate to the Record and continue with contract workflow.
- CLM Users can now import a third party document into a Record via AI.
 Select Import 3rd Party Paper from the action menu and attach a .pdf or .docx document. Onit's AI will process the document and store appropriate information. Once AI processing is complete, the user can navigate to the Record and continue with contract workflow.

CLM Improvements

• Contract admins are notified if no AI checklist is associated with the contract Record.

Co	ontract Lifecycle Management
	Dispert separat when on how both on previous in Copyrate and when
	and a second sec
	An AI Review was attempted and there was no associated Checklist so a review was not ruplease update the Review mappings. If you want this contract to be reviewed, you will have initiate the review manually.
	Requester Name -
	Requester Email -
	Contract Type -
	Contract Date -

• CLM users can send supporting/supplemental documentation with a document for signature.

Signer Type *	Please select signer type	~
Name *	Name	
Email *	Email	
Routing Order *	1	
Document *		~
Add Signer		
Include Supporting Documents	s? 🔽	
Supporting Attachment *	Click or drag here to attach a file.	Browse
Recipient is required to: *		~
Recipient is required to: *	Recipient is required to: is required	~
Recipient is required to: •	Recipient is required to: is required	
Recipient is required to: • Additional Attachment	Recipient is required to: is required	

Set Signers		
Signer Type *	Please select signer type	~
Name *	Name	
Email *	Email	
Routing Order *	1	
Document *	Take no action	
Add Signer	View	
Include Supporting Documents?	Accept View and Accept	
Supporting Attachment *	View Read and Accept	
Recipient is required to: *		~
Additional Attachment		

• CLM users can edit a DocuSign document, within the DocuSign UI, after already being sent for signature via the **DocuSign e-Signature Edit View**.

In Authori		In Signatures Other Party Signatures	In Filing	1	In Effect
Click Her	e to Launch: DocuSign e-Signature Edit View				
Contract	Details Other Parties (1) Documents (1) Other Party	/ Contacts (1) Clauses (2) Lifecycle Metrics	(2) Obligations (2) eSign	ature Status (1)	Phase: Other Party Signatures 🗸
Acti	ions 🗸	Filter type ① Simple Adv	vanced Filters 🗸	C Refresh Export V Select Fields	Add Participant
	Status Panel				
	.				Send For AI Review
	Document Name		Last Updated	Sent On	Edit Signature Transaction
	Contract 66998 - Recipient Order	Sent Recipient Name	Status	08/06/21 10:09:32 PM Last Action	Cancel Signature Transaction
	1	Control Conference	Sent		More Actions 🗸
					Post comment

- CLM users can now cancel a DocuSign envelope after it has been sent via the **Cancel Signature Transaction** button.
- Documents converted to PDF from Onit now include the following document protection options:
 - Can print
 - Can modify
 - Can copy
 - Can add notes
 - Can fill fields
 - Can assemble

All settings are enabled by default.

• Template admins can now up-case or down-case Fields via a new drop down.

ι	Jppercase		
l	owercase	2	
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• Improvements to the eSignature Status panel.

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ontract	Details Other Parties (1) Documents (1) Oth	er Party Contacts (1) Clauses (2) Lifecycl	e Metrics (2) Obligations (2) es	Signature Status (1)
Acti	tions 🗸	Filter type ③ Simple	Advanced Filters V	C Refresh Export V
	Status Panel			
	Document Name	Envelope Status	Last Updated	Sent On
	Contract 66998	Sent		08/06/21 10:09:32 PM
	Recipient Order	Recipient Name	Status	Last Action
	1		Sent	

Resolved Issues

- Auto renewal alarms and renewal alarms are now working correctly on all executed contracts.
- Documents now properly unlock after signature decline.
- Reminder alarms are no longer populating "01/01/1970" as the date value.