

CLM Summer Release 2021

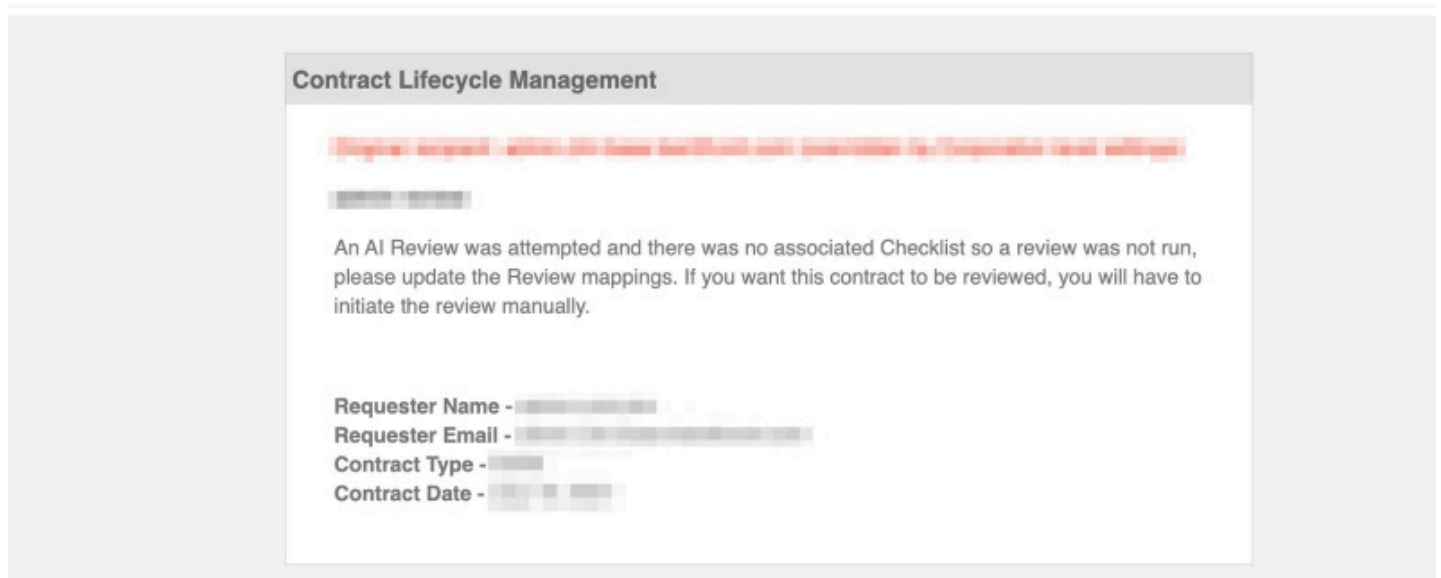
What's New

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.



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

Send for Signature

Set Signers

Signer Type *

Please select signer type

Name *

Name

Email *

Email

Routing Order *

1

Document *

Add Signer

Include Supporting Documents?

☒

Supporting Attachment *

Click or drag here to attach a file.

Browse

Recipient is required to: *

Recipient is required to: is required

Additional Attachment

Submit

Send for Signature

Set Signers

Signer Type *

Please select signer type

Name *

Name

Email *

Email

Routing Order *

1

Document *

Take no action

View

Accept

View and Accept

View Read and Accept

Add Signer

Include Supporting Documents?

☐

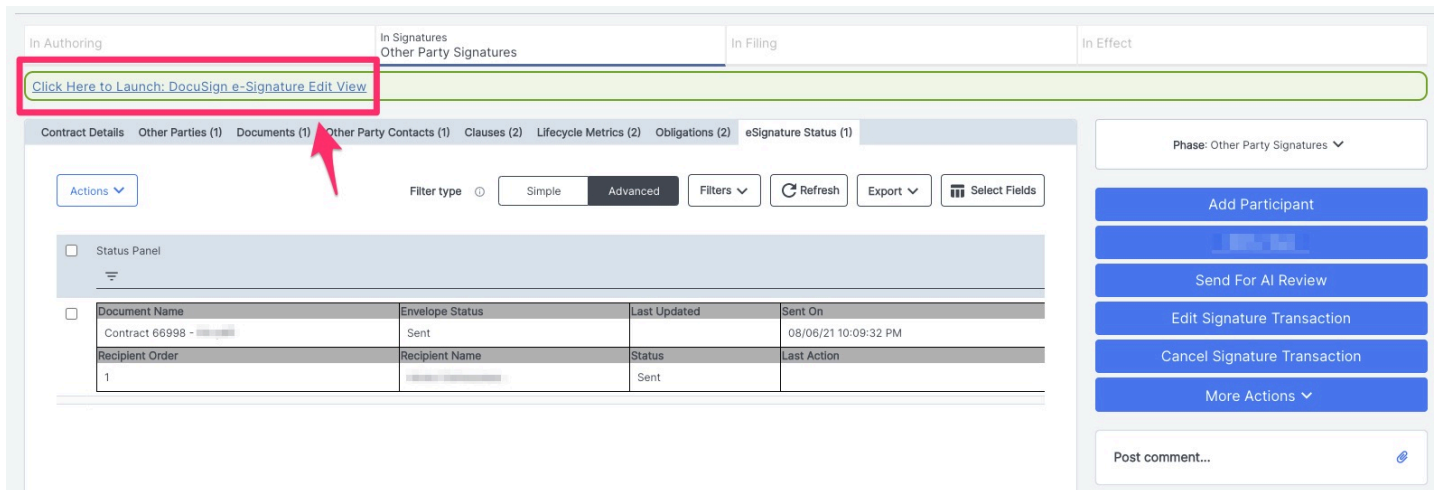
Supporting Attachment *

Recipient is required to: *

Additional Attachment

Submit

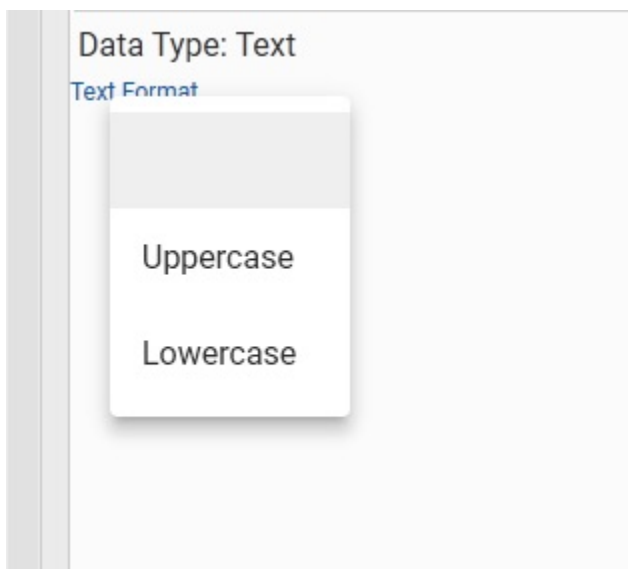
- CLM users can edit a DocuSign document, within the DocuSign UI, after already being sent for signature via the **DocuSign e-Signature Edit View**.



- 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.



- Improvements to the eSignature Status panel.

In Authoring

In Signatures
Other Party Signatures

In Filing

Contract Details

Other Parties (1)

Documents (1)

Other Party Contacts (1)

Clauses (2)

Lifecycle Metrics (2)

Obligations (2)

eSignature Status (1)

Actions

Filter type ⓘ

SimpleAdvancedFilters

Refresh

Export

Select Fields

☐ 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.