

CONTRACTS USER MANUAL - SUPPLIER

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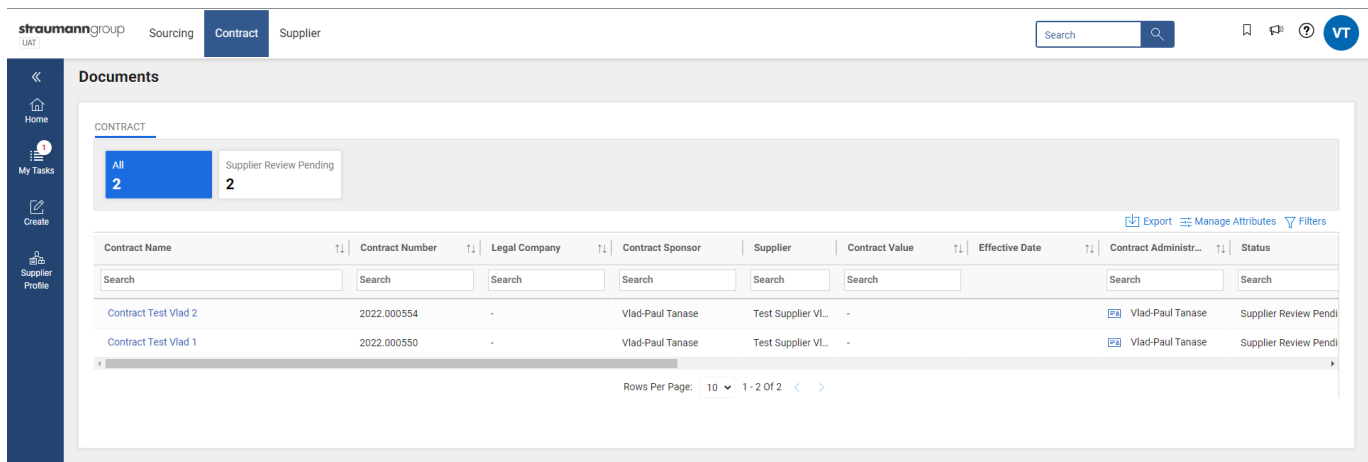
Chapter 1: Introduction

GEP SMART Contract Management, as a supplier, allows you to review the contract through a single centralized automated repository. Its end-to-end capabilities simplify the process of contract signature, approval, negotiation, and management.

This guide helps you navigate through the application and make effective use of its various features and capabilities.

Chapter 2: Overview

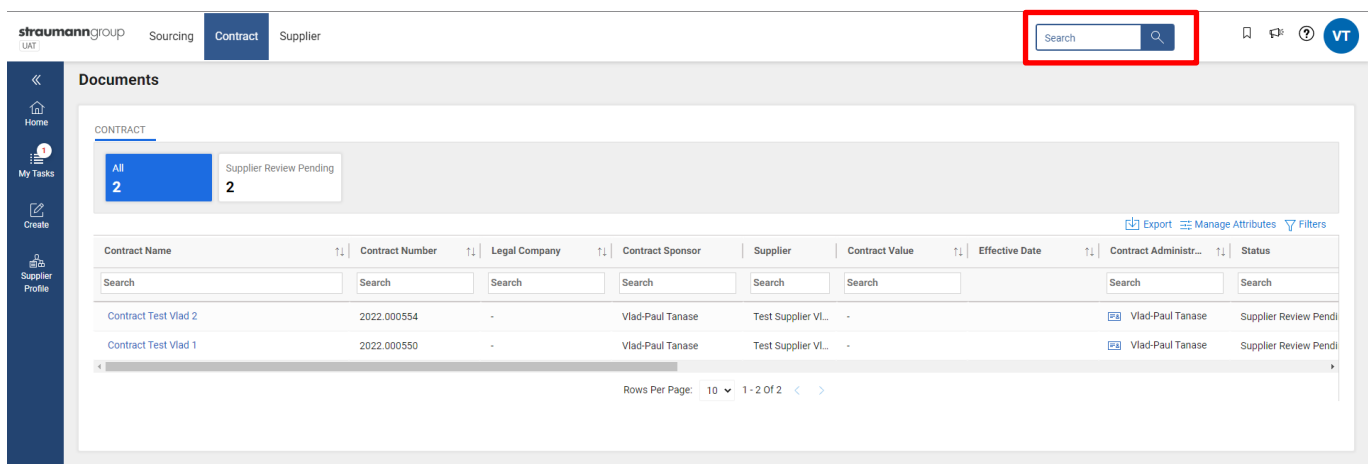
On successful login, the home page is displayed:



To view the contracts, select the contract tab on the home page. The contracts are arranged as Drafts, Live, Executed, Supplier Review Pending etc. The contract documents are categorized and displayed according to the action pending. For example, documents which require the Buyer Signature to proceed are displayed in under the Buyer Signature card type.

Scroll through the cards to locate Contracts on the Contracts card and click the required Contract document to open a specific Contract document.

You can also search for a contract document using the search field on the home page.



Chapter 3: Working with Contracts

You can view the progress of the contracts. For example, you can view if the contract on the buyer side is under team review or is sent for buyer signature. You do not have access to see the contracts in Draft, Execution and Draft Amendment status. However, this depends on the configuration set at the buyer side. You can Accept, Reject or Sign a contract only when the contract is assigned to you.

3.1 Review a Contract

Once the buyer completes drafting the contract and sends the contract for review, you will receive the contract for review. You can view the contract in the Contract section under the **Supplier Review Pending** card.

To review a contract:

- 1) Click the contract name to preview the contract.
- 2) You can view the contract metadata, notes, line items, comments, and notifications but you cannot modify/delete this information.
- 3) You can add attachment, if required. For more information, refer [Adding Attachments](#).
- 4) You can also download the contractual document, modify and upload a new version of the document. For more information, refer [Downloading Contract Document](#).

The screenshot displays the 'Test Contract' page in the 'Supplier Review Pending' state. The interface includes a navigation sidebar on the left with options like Home, My Tasks, Create, and Supplier Profile. The main content area is divided into several sections:

- CONTRACT SUMMARY**: Overview of the contract.
- BASIC DETAILS**: Key contract information.

Contract Name*	Contract Number*	Document Type*	Contract Type*	Contract Administrator
Test contract	2022.000457	Data Protection	Share Purchase Agreement (SPA)	Vlad-Paul Tanase
- APPLICABLE FOR**: Section for applicable information.
- INTERNAL PARTY**: Information about the internal party.

Name*
Anthogyr SAS
- EXTERNAL PARTY**: Information about the external party.

Supplier*	Referred As	Supplier Contact
TestTrainer3	Agent	Test Trainer

At the bottom of the page, there are buttons for 'PREVIEW', 'CANCEL', 'REJECT', and 'ACCEPT'.



Note

You can use MS Word to review your contract. For more information, refer to the [Appendix A – MS Word Plugin](#) chapter.

While you are reviewing the contract, the buyer:

- cannot delete the contract. However, if there are any changes that the buyer must make in the contract, the buyer can withdraw the contract.
- can withdraw the contract only if,
 - ◆ you have not checked out the contract. In case the buyer withdraws the contract, a notification is sent and displayed. You cannot view the contract after it is withdrawn.



Note

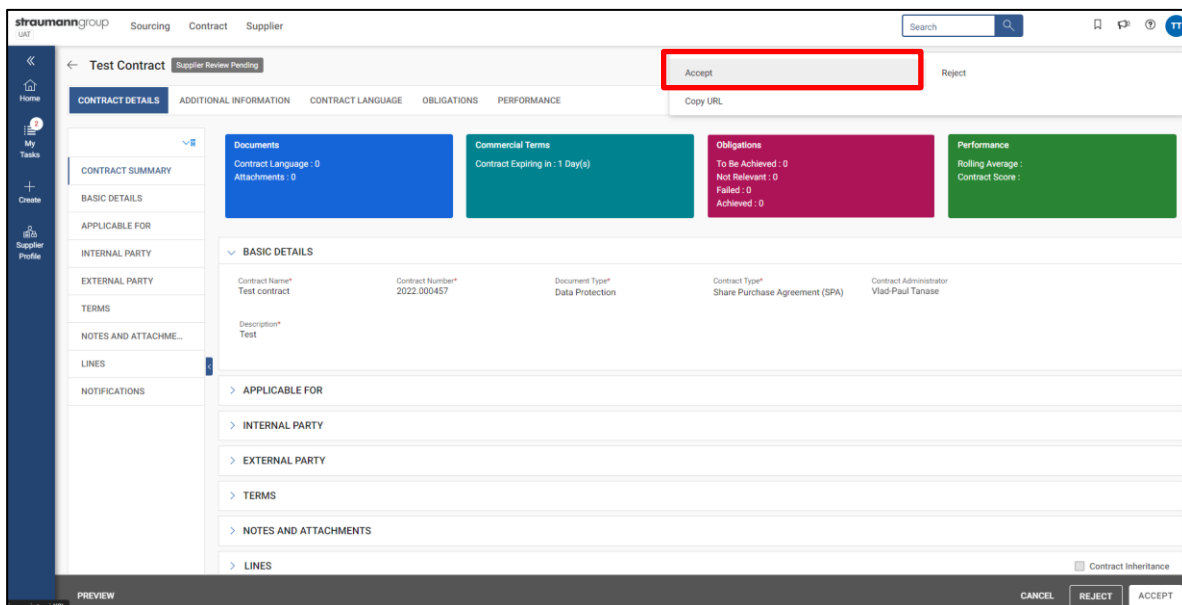
If you have checked out a contract, and the buyer tries to withdraw the contract, an alert message is displayed to the buyer.

3.2 Accept Contract

Once you review the entire contract, the contract can be accepted if it fulfils a certain criteria.

To accept a contract:

- 1) Open a contract which requires a **Supplier Review** or has **Supplier Review Pending** as status.
- 2) Click the Actions Menu and select **Accept**.



- 3) The **Comments** pop-up is displayed.

- 4) Enter the comments and click **Accept**.
- 5) Once you accept the contract, the buyer will receive the contract. If the changes are accepted by the buyer, the buyer clicks Accept in the menu action in the right corner. The status of contract on the buyer side then changes from **Supplier Review Pending** to **Supplier Reviewed**.



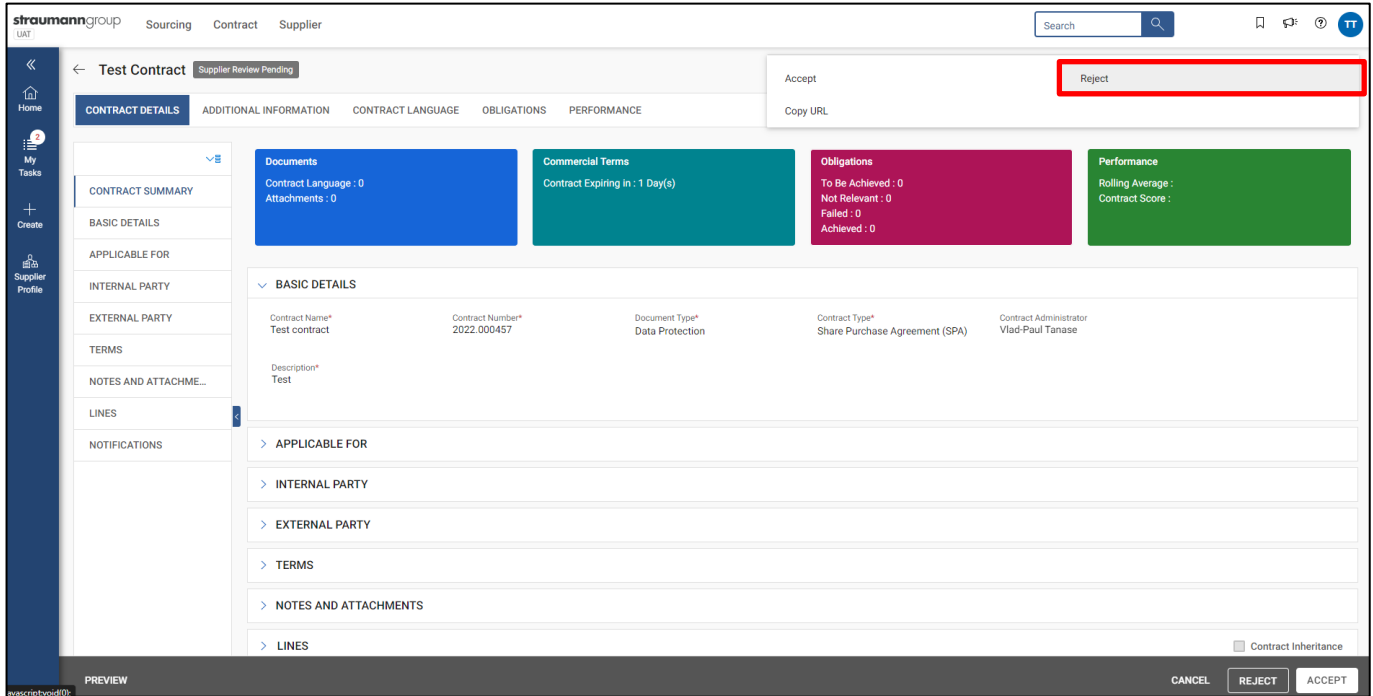
Only when the Buyer has accepted your changes the approval process is completed.

3.3 Reject Contract

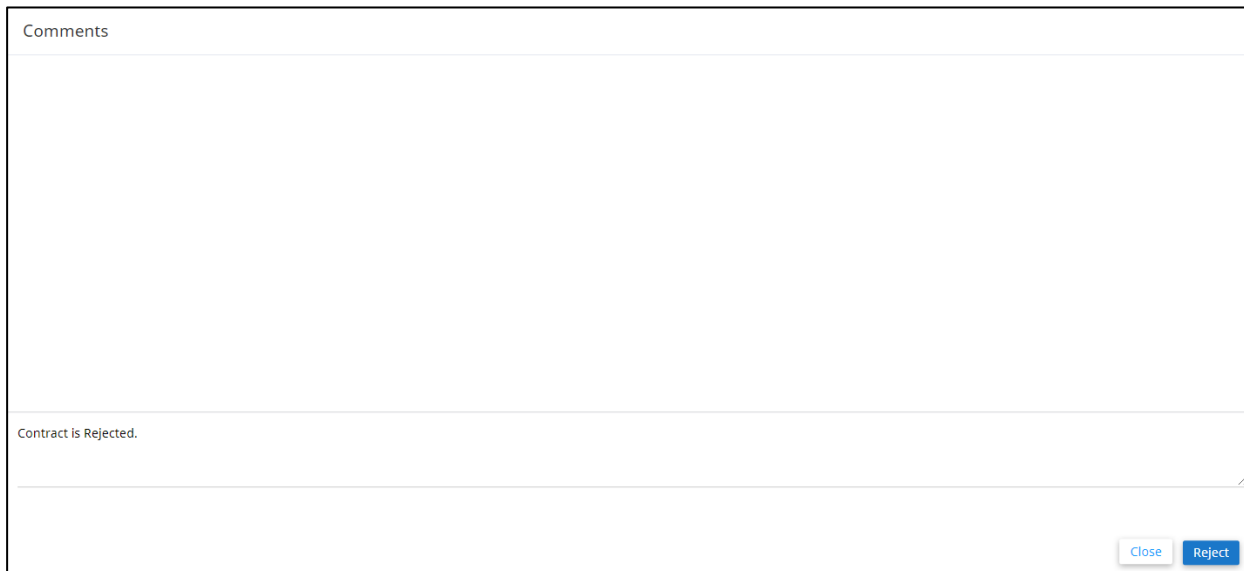
You can reject the contract if the contract does not meet the requirements.

To reject a contract:

- 1) Open an applicable contract.
- 2) Click the Actions Menu and select **Reject**.



3) The **Comments** pop-up is displayed.



4) Enter the comments and click **Reject**.

5) The status of this contract changes from **Supplier Review Pending** to **Supplier Rejected**.

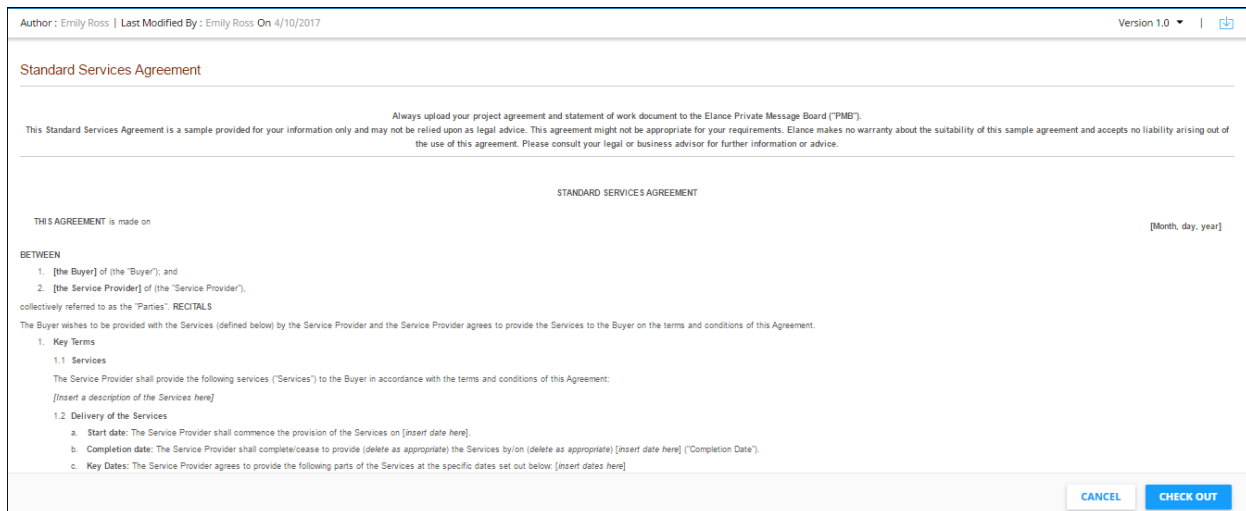
3.4 Downloading Contract Document

You can download the contract document and work on it offline. You can also work on the contract using the Word plugin. For more information on using the MS Word plugin refer [Appendix A – MS Word Plugin](#).

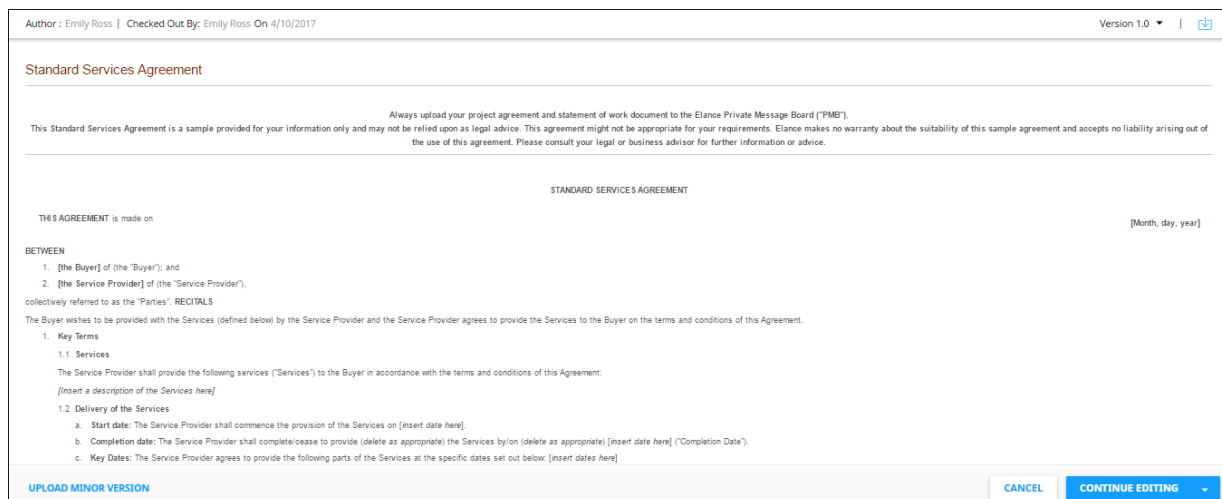
3.4.1 Edit Contract Document Offline

To edit the document:

- 1) From the Contract, click on Contract Language and under the Contracts card click the contract name.
- 2) Click Check **Out**, to edit the document.



- 3) Click Continue **Editing**, to edit using online editor.

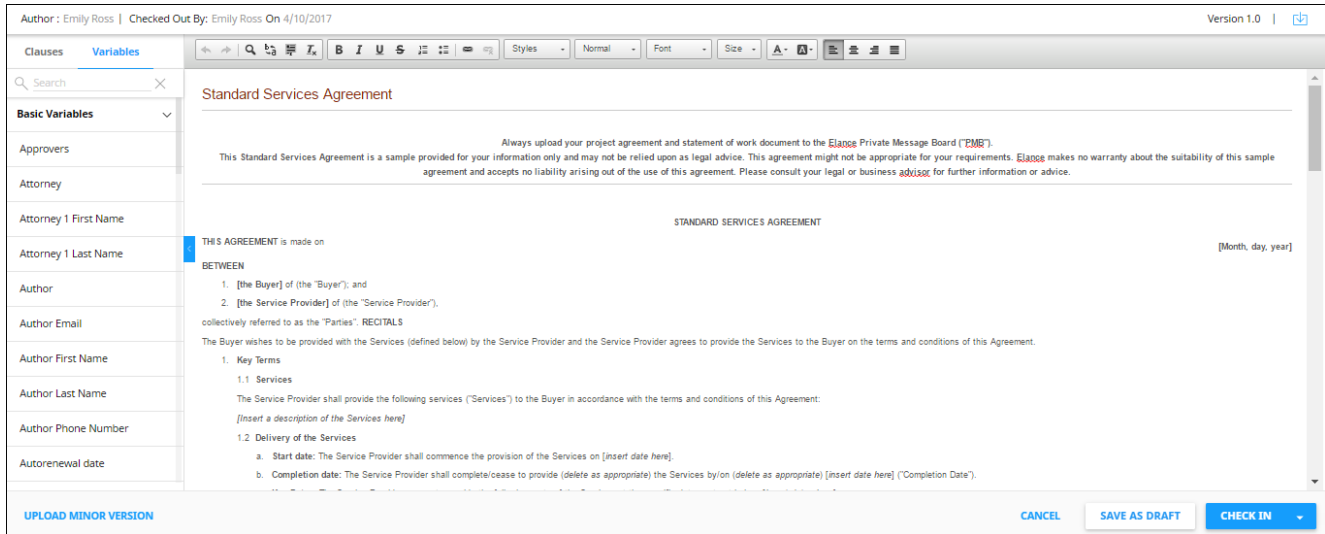




Note

To directly upload a new version of the document, click **Upload Minor Version**. Browse to the required document and click **Open**. A new version of the document is uploaded.

4) Click **Check In**, to mark the document as the latest updated version.




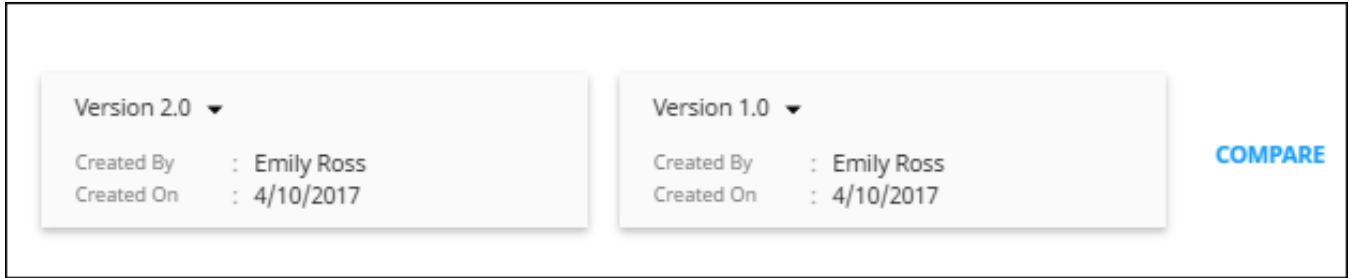
The left pane repository displays the variables. With your cursor positioned where you want the variable content to appear, select the variable from the left panel to insert it.

Once the variables are inserted, click **Save As Draft** to update the changes. Click **Check In**, to mark the document as the latest updated version.

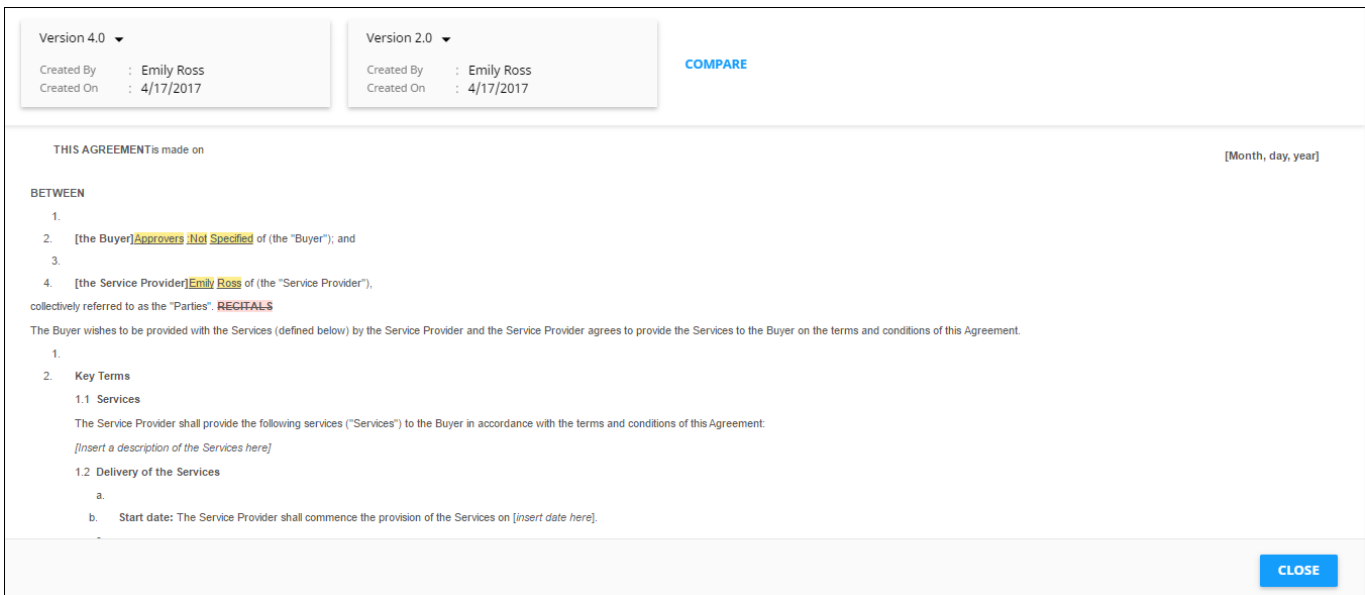
You can click Upload Minor Version, to upload a minor version. Only the user who has uploaded this version can view it. All the other users will see the major versions only.

Compare Version



To view the different versions of the document, open the contractual document from the Contract Language section and click the **Compare Versions**  icon to view the version you want to compare. By default, the latest version is shown. You can change the version by using the drop down.



The Compare Versions link opens a new pop-up window, in which you can view the differences in both the documents. The differences are highlighted as per specified colour code specified on the page. Any data that has been deleted in the new version will be highlighted in Light Red and any data that has been inserted in the newer version will be highlighted in Yellow.




Download Document

You can view or delete uploaded pre-signed contract language documents. Select the document and click the **Download Selected**  icon or **Delete Selected**  icon.



Note

- Click **Download Plugin to Draft Offline**  icon, to download the word plugin and work offline on the contract. For more information refer, Appendix.

Review Status

This section displays current review status of the document, whether the document is in draft stage, reviewed or pending for review.

Contract Language - Draft - Microsoft Word						
<input type="checkbox"/>	Name	Author	Modified By	Status	Modified On	Version
<input type="checkbox"/>	contract-services (1)	TestAscena UAT_1	TestAscena UAT_1		05/30/2017	1

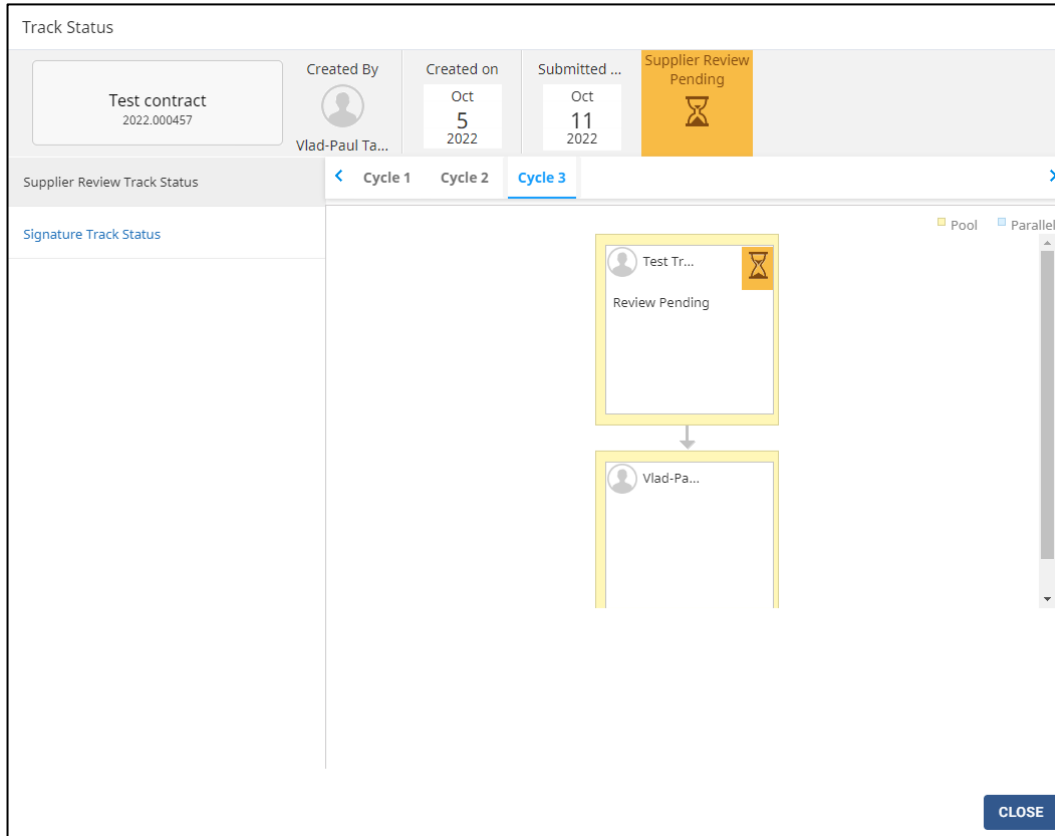
3.5 Tracking the Status

To track the status of a contract:

- 1) On an applicable contract, click **Track status**.

The screenshot shows the 'Test Contract' page in the UAT system. The page title is 'Test Contract' with a sub-status of 'Supplier Review Pending'. The breadcrumb navigation includes 'Sourcing', 'Contract', and 'Supplier'. A search bar is located in the top right corner. Below the navigation, there are buttons for 'COMMENTS', 'TRACK STATUS' (highlighted with a red box), and 'DISCUSSION FORUM'. The main content area is divided into several sections: 'CONTRACT SUMMARY', 'BASIC DETAILS', 'APPLICABLE FOR', 'INTERNAL PARTY', 'EXTERNAL PARTY', 'TERMS', 'NOTES AND ATTACHE...', 'LINES', and 'NOTIFICATIONS'. The 'BASIC DETAILS' section is expanded, showing fields for Contract Name*, Contract Number*, Document Type*, Contract Type*, and Contract Administrator. The 'Obligations' section shows metrics for 'To Be Achieved', 'Not Relevant', 'Failed', and 'Achieved'. The 'Performance' section shows 'Rolling Average' and 'Contract Score'. At the bottom of the page, there are buttons for 'PREVIEW', 'CANCEL', 'REJECT', and 'ACCEPT'.

The **Track Status** screen is displayed.

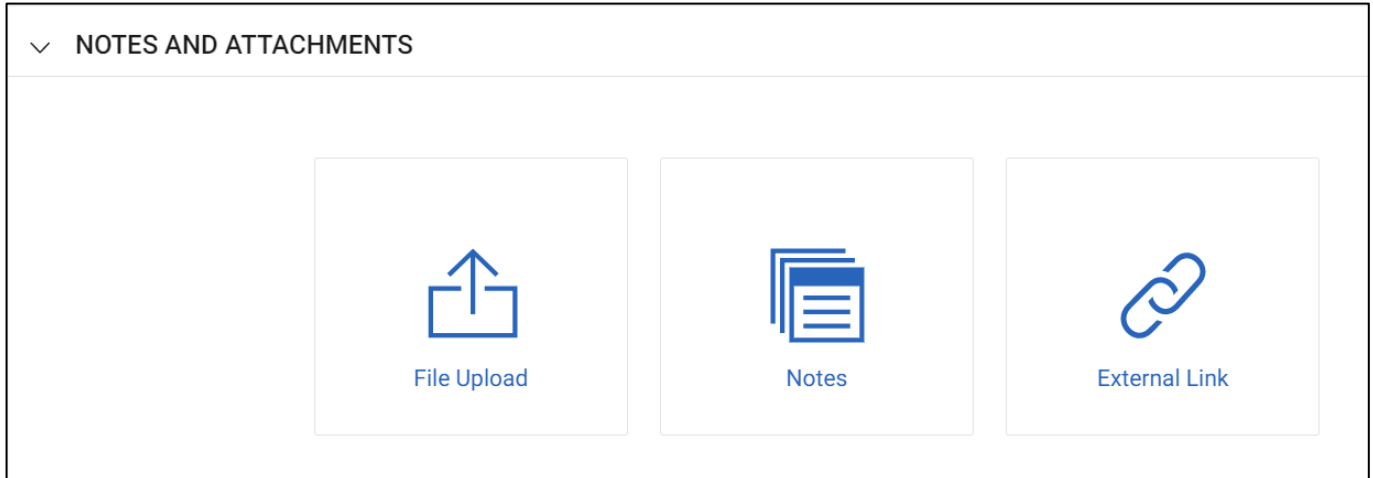


3.5.1 Notes and Attachments

You can upload soft copies of the contract documents and additional documents for the contract. You can also add notes and external links.

Upload all relevant documents either as scanned or as individual attachments, including:

- Internal Process Sign off Forms
- Appendices
- Notes and external links
- Any other documents pertaining to the contract that may be useful

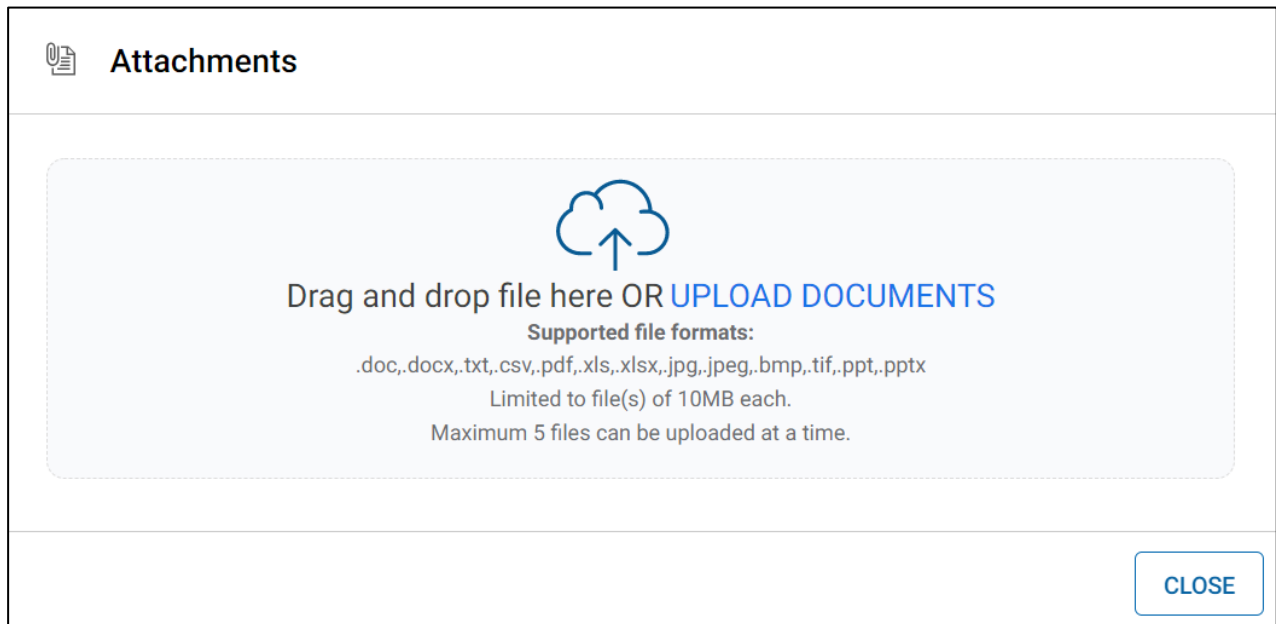


To upload a document:

- 1) Click **File Upload**, browse to the document and click **Open** to upload the document.

OR

Drag and drop the document and click **Close** to upload the document.



- 2) The document is uploaded and displayed in a grid.


NOTES AND ATTACHMENTS							Download Selected	Delete Selected	Add Attachment
Name	Classification	Type	Added	Added By	File Size				
<input checked="" type="checkbox"/> Dummie doc.docx	Please Select	File	10/11/2022	Test Trainer	12.00 KB				

Rows per page: 5


To add Notes:

3) Click **Notes**.


NOTES AND ATTACHMENTS



File Upload



Notes



External Link

4) The **Notes** pop-up is displayed.

 **Notes**

Name*

Description*

CANCEL **SAVE**

5) Enter the **Name** and **Description** and click **Save**.

The added notes are displayed in a grid.


NOTES AND ATTACHMENTS							Download Selected	Add Attachment
Name	Classification	Type	Added	Added By	File Size			
<input type="checkbox"/> Note 1	Please Select	Notes	01/25/2021	Demo Supplier	-			

Rows per page : 5


To add external links:

- Click **External link**.


NOTES AND ATTACHMENTS



File Upload



Notes



External Link

- The **External Link** pop-up is displayed.

 **External Link**


Name*

URL*

CANCEL SAVE

- Enter the **Name** and **URL** link and click **Save**.

9) The added details are displayed in a grid.



NOTES AND ATTACHMENTS						
<input type="checkbox"/>	Name ↕	Classification ▾	Type ▾	Added	Added By	File Size
<input type="checkbox"/>	External Link for Laptops 	Please Select ▾	External Link	01/25/2021	Demo Supplier	

Rows per page : 5 ▾



Note

*In case you have uploaded a document or attachment or an external link, you won't be able to view the respective icons. In case you want to upload any of them, click the **Add Attachment** icon and select the applicable option.*

- To download the uploaded document or notes or attachment, select the document and click the **Download Selected**  icon. This is also applicable if you want to download multiple files. The multiple files downloaded will be collated in a zip file.
- To delete the uploaded document or notes or attachment, select the document and click the **Delete Selected**  icon. A confirmation popup is displayed. Click **Yes** to delete the file.

3.6 Exporting a Contract

You can download the entire contract. For more information refer [Downloading Contract Document](#) or can choose to download contract coversheet details, contractual language, attachment or line items in Word or PDF format.

To export a contract:

- 1) From the Workspaces home page, click **Manage**, and under the Contracts card click the contract name.
- 2) Click **Export** from the Actions menu. The following **Export** pop-up is displayed.

Export

1. Contract Details

2. Contractual Language

3. Attachment

4. Line Items

6. Performance Management

[VIEW LOG](#) [CANCEL](#) [EXPORT](#)

3) Select the required document and click **Export**. The success message is displayed.

The document will be downloaded in zip format in your **Downloads** folder. Click on the zip file to view the details in the attachment.

4) To view the downloaded document details click **View Log**.

3.7 Supplier Signature

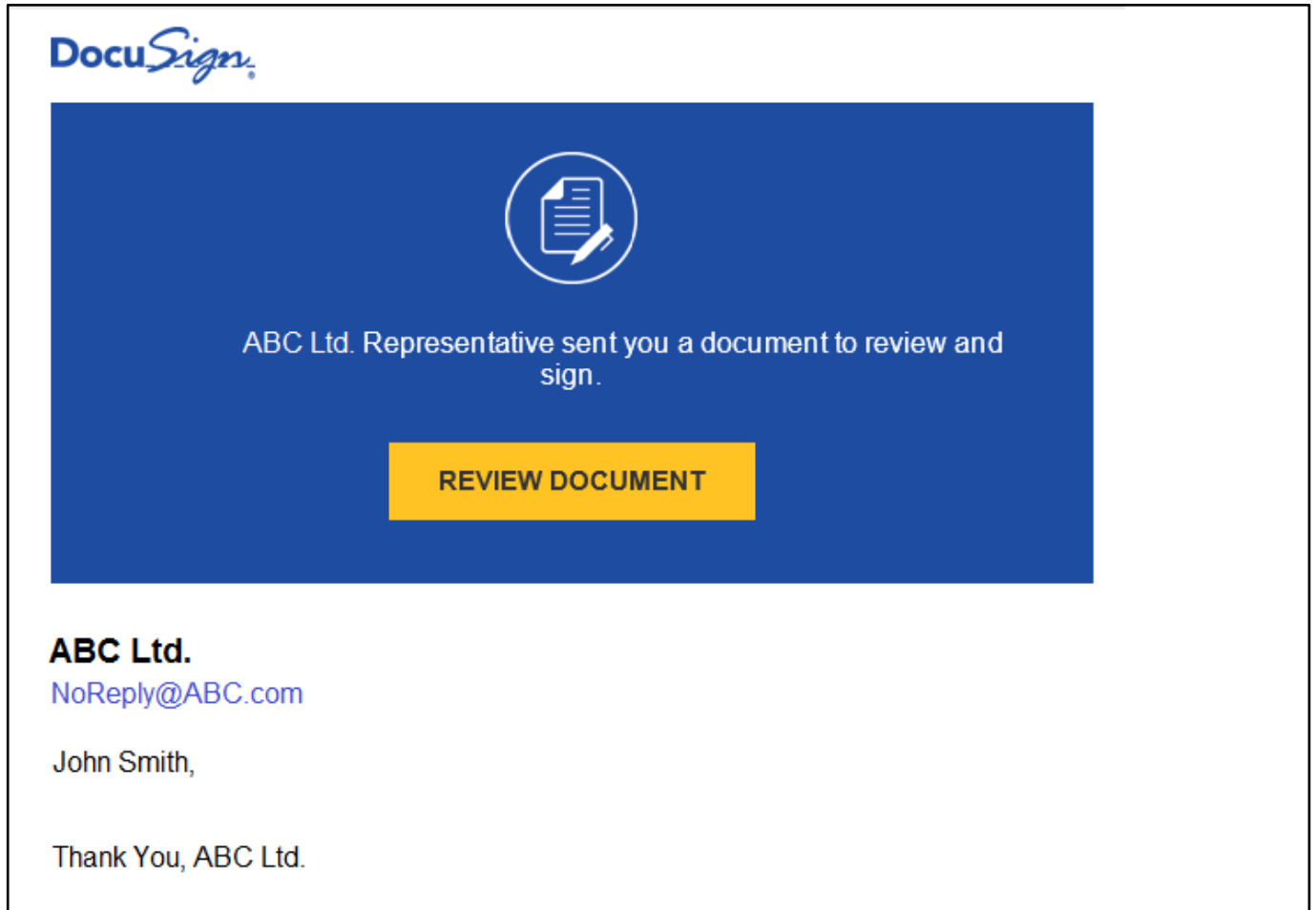
GEP SMART provides [DocuSign](#) as signature option.

Once the Buyer clicks on Send for Supplier Signature, the contract is available to you with status as Supplier Signature Pending. You will receive an email to sign the contract.

3.7.1 DocuSign

DocuSign helps you to quickly and securely access and sign documents digitally. You can easily upload and send documents for others to sign. You can also send reminders and check signing status any time using DocuSign.

You will receive an email to review and sign the document as follows:



- 1) Open the DocuSign email and click **Review Document**.
- 2) Review the consumer disclosure and select the **I agree to use Electronic Records and Signatures** checkbox.
- 3) Click **Continue** to initiate the signing process.
- 4) Drag and drop Signature from the Fields Pane in your document to digitally sign the document.

The Adopt your Signature screen is displayed.

Perform one of the following steps:

Accept the default signature and initial style and go to the next step.

OR

Click **Select Style** and select a different signature option.

OR

Click **Draw**. Draw your signature/initials using a mouse, or your finger or a stylus on a touchscreen.

- 5) Click **Adopt and Sign to adopt** and save your signature and return to the document.
- 6) When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.

FIELDS

- Signature
- Initial
- Date Signed
- Name

- First Name
- Last Name
- Email Address
- Company
- Title

- Text
- Checkbox

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DocuSign Envelope ID: C467D060-3499-4062-9879-F48BC02D917E

Contract No: 2016.000367

ABC Corporation

CONFIDENTIAL DISCLOSURE AGREEMENT

THIS AGREEMENT, effective as of 08 Aug 2016 ("Effective Date"), is by and between ABC CORPORATION, (for its benefit and that of its affiliates), a Del ("Discloser") and UAT Partner 1, whose address is , , ("Recipient") (each "Party" and both "Parties").

RECITAL

Discloser desires to disclose certain Confidential Information, as defined herein, some or all of which Recipient desires to receive solely for the Purpose, subject to the terms and conditions of this Agreement.

AGREEMENT

In consideration of the foregoing and of the mutual covenants contained herein, the Parties agree as follows:

1. Definitions. As used in this agreement.
 - (a) "Purpose" means evaluation and analysis of Discloser's business, manufacturing, development, and marketing requirements relating to Discloser's technologies.
 - (b) "Confidential Information" means information disclosed by or on behalf of Discloser, including without limitation, technology, specifications, designs, drawings, processes, components, machines, manufacture, tools and fixtures, materials, composition of matter, know-how, computer programs, product designs, quality requirements, regulatory, market and business plans (including Discloser's interest in the subject matter of this Agreement), and any idea, knowledge, or information developed by Recipient as a result of the disclosures made by Discloser under this Agreement. No information shall be regarded as Confidential Information which Recipient can show by competent proof.

Done! Select Finish to send the completed document.
FINISH
OTHER ACTIONS ▾



Note

To view additional options, click **Other Actions**. For more information of other actions available, please review our [Signing Documentation](#).

A message is displayed stating that you have completed your document. You can download a PDF copy or print a copy of the document. You will receive an email with the signed document attached, and the signed document is displayed on your DocuSign account.

Chapter 4: Appendix A – MS Word Plugin

The GEP SMART plugin will help you use the GEP SMART functionality in Word. You can perform all the activities on the Contract Language in Word that you perform using GEP SMART.

The GEP SMART plugin will help you use the SMART functionality in Word. You can perform all the activities on the Contract Language in Word that you perform using GEP SMART.

4.1 Adding GEP SMART Plugin



To download the Word plugin:

- 1) From the **Contract Language** section, click **Download plugin to Draft Offline**  icon.



Note

You need to upload a contractual document using Draft – Microsoft Word option, only then you can view the Download plugin to Draft Online icon.

CONTRACT LANGUAGE - Authoring							
<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type 	Modified On	Version
<input type="checkbox"/>	 Contract for IT Services 001.pdf		Ben Watson	Ben Watson	Signed Copy	28/07/2020	-

The plugin is downloaded and is saved in the Downloads folder.

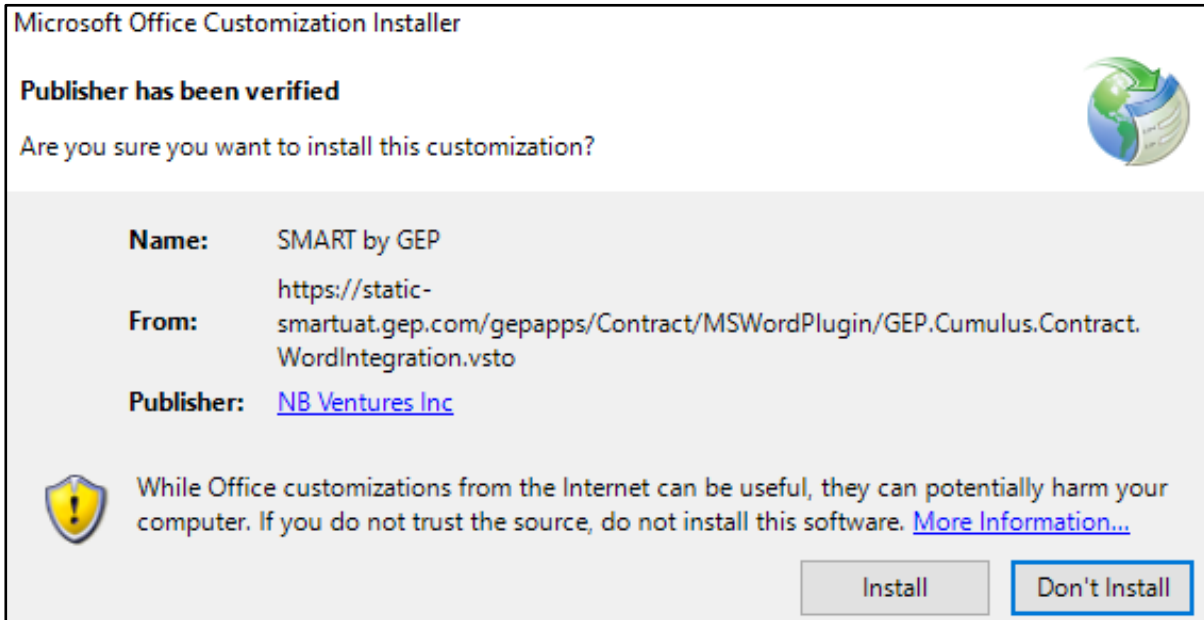


Note

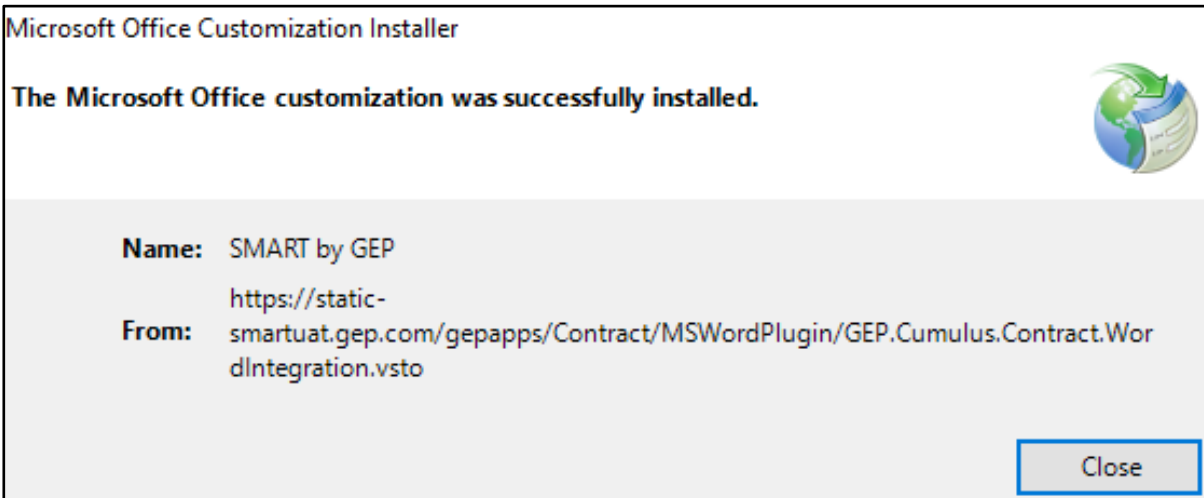
You need to have admin rights to your system to install the MS Word plugin.

- 2) In the **Downloads** folder, click **Setup.exe** to initiate the installation.

The following **Setup** screen is displayed.



- 3) Click **Install** to install the plugin. Once the plugin is installed the following success popup is displayed.

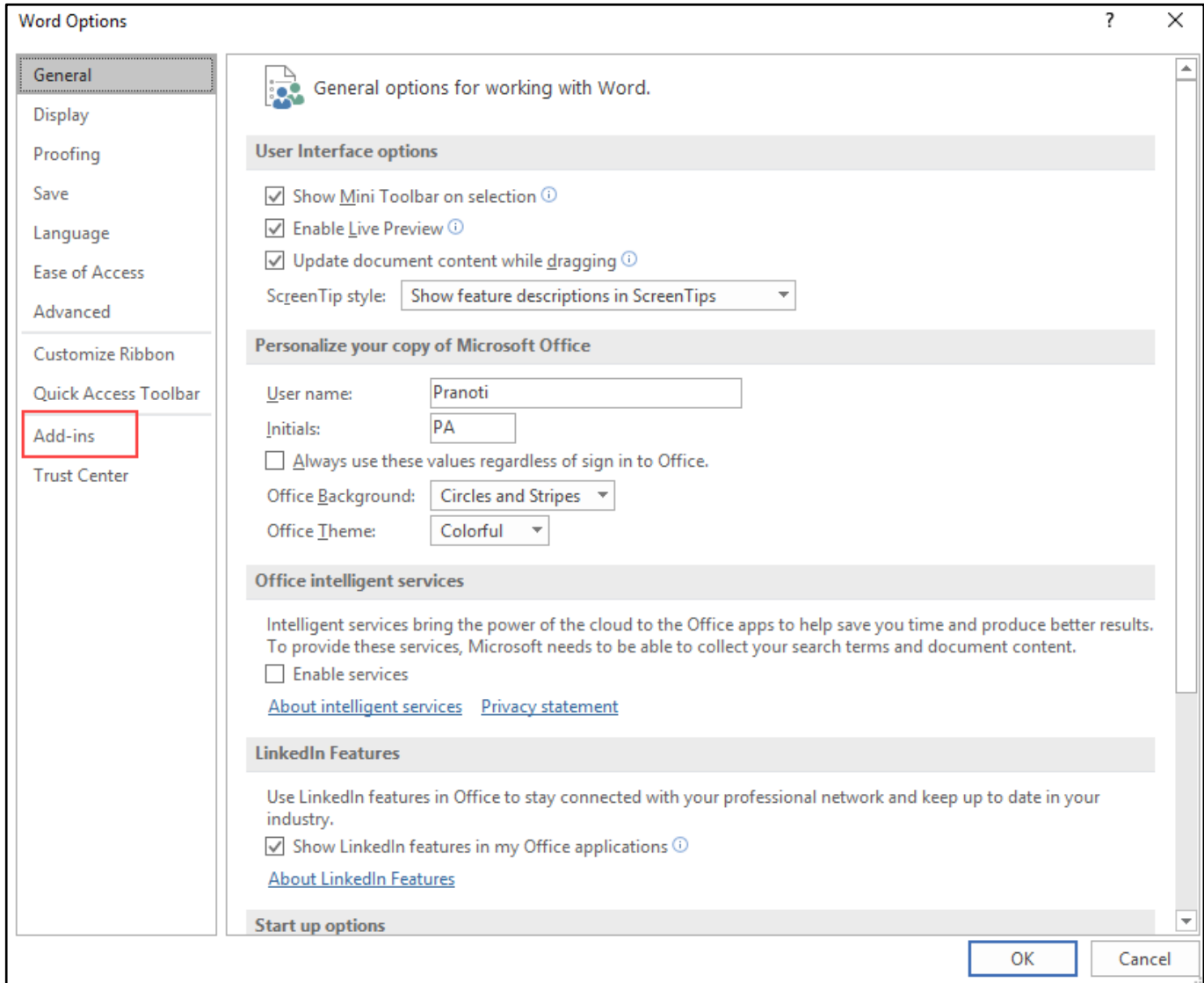


- 4) Click **Close**. The plugin is now installed.

4.2 Enabling the plugin in Word

Once the GEP SMART plugin is installed you need to manually enable the plugin in Word. To enable the plugin:

- 1) Open a Word document and select the **File** tab.
- 2) Click **Options**.



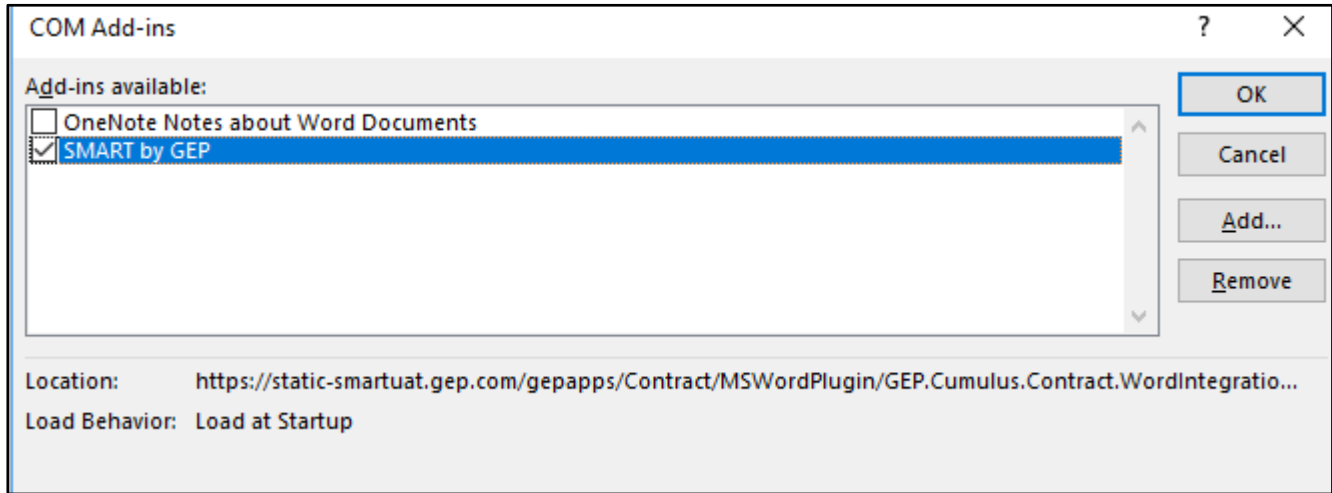
3) Click **Add-Ins** from the left pane.

4) In the details pane, the **GEP SMART** Add-in is displayed in the **Inactive Application Add-ins** list.

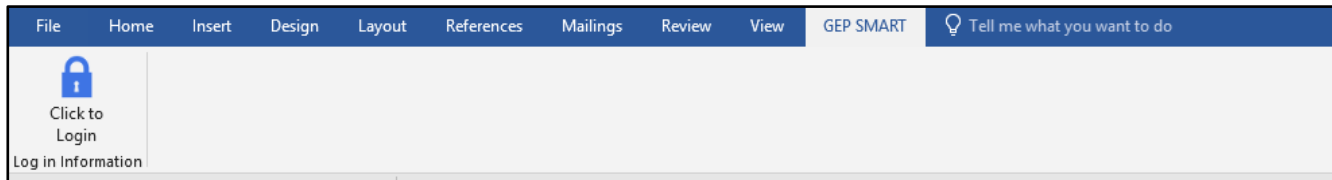
The Name column specifies the name of the assembly, and the Location column specifies the full path of the application manifest.

5) In the **Manage** box, click **COM Add-ins**, and then click **Go**.

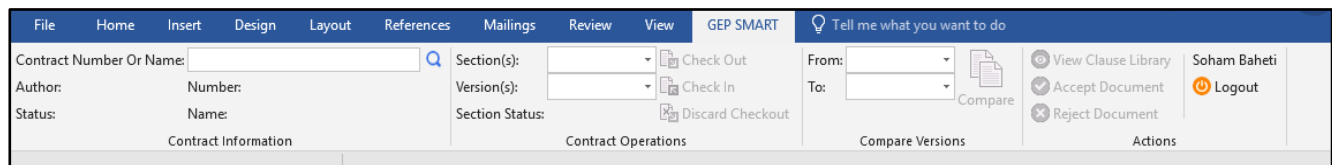
6) Select the desired Add-In and click **OK**.



7) The GEP SMART plugin is now enabled in your Word File.
You can view this plugin in your toolbar and is named as GEP SMART.



8) Click the **Click to Login** button, enter your credentials and start using the Word plugin.



About GEP SMART

GEP helps global enterprises operate more efficiently and effectively, gain competitive advantage, boost profitability, and maximize business and shareholder value.

Fresh thinking, innovative products, unrivaled domain and subject expertise, and smart, passionate people – this is how GEP creates and delivers unified business solutions of unprecedented scale, power and effectiveness.

With 14 offices and operations centers in Europe, Asia and the Americas, Clark, New Jersey-based GEP helps enterprises worldwide realize their strategic, operational and financial objectives.

Recently named Best Supplier at the EPIC Procurement Excellence Awards, GEP is frequently honored as an innovator and leading provider of source-to-pay procurement software by top industry and technology analysts, such as Forrester, Gartner, Spend Matters, Paystream and Ardent Partners. GEP also earns top honors in consulting and managed services from the industry's leading research firms, professional associations and journals, including Everest Group on its PEAK Matrices of Procurement Services Providers and Supply Chain Services Providers; NelsonHall on its NEAT Matrix of Global Procurement BPO Service Providers; HfS in its Blueprint Report on Procurement-as-a-Service; and ALM Intelligence in its Vanguard Reports on both Procurement Consulting and Supply Chain Consulting.

To learn more about our comprehensive range of strategic and managed services, please visit www.gep.com. For more about GEP SMART, our cloud-native, unified source-to-pay platform, please visit www.smartbygep.com.