



# UpsideContract

## Version 6.5 (V6.5) Highlights

### Overview

UpsideContract V6.5 is packed with exciting new features & enhancements. We have listened to what our customers have said & delivered this latest version of our industry leading software to provide even greater functionality & ease of use. The following features are included:

### Business Entity Enhancements

A Business Entity can now be searched for & edited directly from a Contract Header. UpsideForms have also been integrated into Business Entities to provide tracking & updating of a broad range of vendor / customer information (version 6.5.1 & higher). Four new types of Business Entity Merges have been added to provide greater control over how a merge is performed. New merge types include: Remove Duplicate, Corporate Merger, Single Relationship Merge, & a Selective Move.

### Visual Workflow

A Predictive Analysis feature has been integrated into our powerful Visual Workflow. This enables navigation throughout the entire workflow based on its current state, as well as the values contained in document placeholders. You can now visualize potential future steps of the workflow & make important business decisions based on this information. We have also improved the way information is presented to ensure clear & effective representation of workflow stages. Past, current & future tasks are uniquely identified & a workflow breadcrumb history is included to easily navigate your way through the workflow.

### Improved Loading Times

V6.5 aims to improve loading times even further & provide access to information faster. Several key areas have been improved upon including Contract Requests & Templates. There are improvements throughout the application; those listed above are just some of the highlights.

### Version 6.5 Highlights

- Business Entity Enhancements
- Predictive Analysis on Visual Workflow
- Improved Loading Times for contract requests & templates amongst other areas
- Automatic Placeholder Resolution
- Word IO Enhancements
- Primary Attachments
- Grouping of User Defined Fields
- Virtual Listing for Contract Related Records

## Automatic Placeholder Resolution

In V6.5 it is now possible to have placeholders show their values automatically within the Document Structure Editor (DSE). This feature is optional & can be controlled by each company to suit their preferences. If selected, it will no longer be necessary to click a button to display placeholder values – they will automatically be loaded each time the document is opened in the DSE.

## Word IO Enhancements

We have added an option to select default values for some of the required fields of Word IO. Default values can be selected for the export method, type of operation, Output Format, Redline Mode, as well as the User / User Role. We have also added the capability to lock redlining in exported documents to make it easy to review changes before the document is imported back into the system

## Primary Attachments

A new feature in V6.5 allows you to flag an attachment that is important for viewing by all stakeholders of your Contract, RFP or Invoice. When an attachment is flagged as a Primary Attachment, an icon on the listing screen provides instant access to the attachment for quick viewing.

## User Defined Fields

V6.5 introduces new configuration features for User Defined Fields (UDFs) to control how they are assigned & presented in the application. UDFs can now be grouped together into logical groups & assigned as blocks. They can also have aesthetic properties such as headings assigned to them.

## Virtual Listing for Contract Related Records

The Contract Related Records area has been enhanced to include Virtual Listing functionality. The Virtual Listings screen utilizes filtering options to return only the records that meet your specified criteria. It also enables customization of the information that is displayed in the Virtual Listing grid.

## Distribution Lists for Alerts

The Alerts functionality has been updated to provide more configuration options. This enhancement includes the ability to create distribution lists & alert specific users for various milestones such as contract renewal & expiration, deliverables & more (version 6.5.1 & higher).

## Project Lookup

The Project Lookup feature has been updated to simplify the search process. It is now possible to search by an exact search term or similar search terms. This new feature enables you to search for a project without ever leaving the entry screen you are on & without having to know the exact search term required.

## Version 6.5 Highlights

- Navigation Tree Record Counts
- Distribution Lists for Alerts (version 6.5.1 & higher)
- Project Lookup Enhancements
- Workflow Clause Level Approval (version 6.5.3 & higher)
- Business Entity UDF Enhancements (version 6.5.3 & higher)
- Non-Negotiable Contracts (version 6.5.3 & higher)
- Upside Web Reports (version 6.5.3 & higher)
- Export / Import Clause Notes (version 6.5.6 & higher)
- Add an External Link Panel on the Dashboard (version 6.5.8 & higher)
- Pre-select Default Values for Optional Alternative Group Items (version 6.5.8 & higher)
- One-Time Compliance Items (version 6.5.8 & higher)

## Workflow Clause Level Approval

The Workflow Clause Level Approval feature facilitates clause level wording changes during the contract negotiation process. This new feature allows users to review the changes being proposed and accept or reject / renegotiate them. It also enables feedback to be collected and then used to inform custom workflow processes. Filtering options are provided to highlight the clauses that are pending review and streamline the review and approval lifecycle. (version 6.5.3 & higher).

## Business Entity UDF Enhancements

To complement the ease with which you can edit Business Entities from a Contract Header, we have now added this feature to User Defined Fields (UDFs) as well. With this new enhancement, it is now possible to edit the UDFs associated with a Business Entity directly from the Contract Header (version 6.5.3 & higher).

## Non-Negotiable Contracts

For some clients there can be a high volume of contracts where negotiation of the legal text within the contract is not permitted. The Non-Negotiable Contracts feature simplifies the creation process for such contracts by drawing legal text directly from the template used to create the contract. This eliminates the need to replicate standard text for each contract created (version 6.5.3 & higher).

## Upside Web Reports

In V6.3 we introduced Upside Web Reports as a highly configurable reporting tool that combined Ad-Hoc and Standard reporting functionality within UpsideContract. We have now introduced this functionality to UpsideAdmin and UpsideRFX as well to provide more robust reporting features to the application (version 6.5.3 & higher).

## Export / Import Clause Notes

Word IO has enabled users to convert comments contained in imported Word® documents into notes in the Document Structure Editor (DSE). It is now possible to convert notes created in the DSE as comments in exported Word® documents (version 6.5.6 & higher).

## Conclusion

With more options to control the way contracts are created & managed, & a more intuitive & easier to use application, V6.5 gives users greater power to influence the entire business cycle from start to finish. Ask an Upside representative about upgrading to UpsideContract V6.5 at [ask@upsidesoft.com](mailto:ask@upsidesoft.com).

**For more detailed information on UpsideContract, visit:**

<http://www.upsidesoft.com/Upside+Software/Products/UpsideContract.htm>

## About Upside Software

Upside Software is the worldwide leader in Contract Lifecycle Management (CLM) solutions. Customers around the globe use Upside Software's suite of products to confidently perform Contract Management, Commitment Management, Sourcing & Procurement, & Invoice & Billing management activities throughout their organizations.

Upside Software's products address the needs of Enterprise (e.g. Fortune 500, Global 2000), Public sector (Federal, State / Provincial, Municipal & Health Care), & Small & Medium Enterprise (SME) customers. Customers realize significant cost savings while improving customer & supplier relationships. Upside Software's solutions are deployed very quickly & typically provide a full return-on-investment (ROI) in well under a year.

Founded in 2000, Upside Software is a profitable (since 2001), rapidly growing software company with an advanced, yet mature, & comprehensive product suite. The company has extensive experience delivering real value to customers (about 300) of every size & in most industry verticals.

*For More Information:*

**Upside Software Inc.**  
Suite 310, Manulife Place  
10180 – 101 Street  
Edmonton, Alberta, Canada T5J 3S4

Phone: 1-877-984-2455- toll free  
+1 780-702-1432 (local)

Fax: +1 780-702-1438

E-mail: [ask@upsidesoft.com](mailto:ask@upsidesoft.com)

Visit: [www.upsidesoft.com](http://www.upsidesoft.com)