

UpsideContract Version 7.2 (V7.2) Highlights

V7

Overview

The incredible architecture and cutting edge technology of UpsideContract V7 raised the bar of contract management software and pushed it to the next level. V7.2 continues to build on that success and brings with it even greater performance and a more intuitive user interface. V7.2 is the evolution of our industry-leading and #1 rated UpsideContract product, and continues to respond to what our customers are asking for.

The following highlights are just some of the many features available in V7.2:

Placeholder Management

Effective placeholder management is a key aspect of contract document creation. V7.2 includes tools that allow you to organize your library of placeholders and define which placeholders should be included within specific documents. This feature simplifies the list of placeholders available for selection during the contract creation process and speeds up processing.

Increased Metadata Import from Microsoft® Word

V7.2 builds on our powerful Microsoft® Word integration and enables streamlined data capture. Changes to metadata such as placeholder values, name and address changes to Legal Entities, single-value Data Extensions (previously known as UDFs) and more are now highlighted and available for import, and done so in a much easier and automated manner.

Selective Copy for Templates and Contracts

Templates and contracts often have complex record sets associated with them including notes, attachments and other documents. In some cases, when a copy is made of a contract or template, all of the associated record sets do not need to be copied over as well. V7.2 allows you to select which records to copy and minimize unnecessary duplications.

Legal Entity Performance Management

The powerful Legal Entity Performance Management features of V7.2 provide the ability to create and track the performance, compliance and manual task information for all Legal Entities in the system. This enables you to have a clear picture of which Legal Entities are performing as they should and which ones need more attention.

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- Placeholder management options help refine the list of placeholders available during contract creation.
- Enhanced integration with Microsoft® Word increases metadata import capabilities.
- Selective Copy functionality allows for greater control over which documents are included when copying a template or contract.
- The Legal Entity Performance Management feature allows the creation and tracking of performance and compliance metrics.
- New ability to add attachments to terminated contracts.
- Comprehensive auditing capabilities allow even greater tracking of all entities.
- Robust data capture functionality.
- Preset default values for Optional Alternative Group Items on templates.

Add Attachments to Terminated Contracts

V7.2 brings with it the option to add attachments to contracts that have been terminated. This feature addresses the need to keep track of contract documentation even after a contract has been terminated so that it can be referenced again in the future.

Comprehensive Auditing

UpsideContract is renowned for its auditing capabilities. V7.2 builds on this powerful feature and adds even greater tracking capabilities for all entities within the system, in addition to providing robust data capture functionality.

Increased Search Filtering and Configuration

Enhancements to UpsideContract's search and filtering capabilities allow for more focused search results and configuration. V7.2 enables users to filter search results by contract type and the fields associated with each contract type. Text searches across contracts and templates as well as attached documents are also now possible. Search results can be viewed at the parent contract level and drilled down to field specific values. Configuration features allow for the addition of specific columns to the search listing grid and also include Data Extension fields (previously known as UDFs).

Preset Default Values on Templates

This feature in V7.2 allows users to preselect the default values for Optional Alternative Group Items when creating templates within the system. At the time of contract creation, the preselected value will be defaulted but still able to be changed based on user preference.

Document Editor Enhancements

Significant enhancements have been made to the Document Editor in V7.2. We have improved the overall appearance and usability of the editor as well as included more configuration options to suit each user's personal requirements. Exciting new features such as smart panels, placeholder autocompletes, new formatting options, and tabular toolbars are just a few of the useful tools built right into the editor. This new interface is very user friendly and easy to use.

Improved Localization / Regionalization

We have improved on our localization and regionalization features within V7.2. Our robust translation capabilities have been enhanced to offer more translation options as well as provide more customization to suit the needs of our global client base. The application now provides even better support for regionalization in a much more native manner.

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- Increased search filtering and configuration capabilities include text searches within contracts, templates and attached documents.
- Significant enhancements to the Document Editor improve usability and overall appearance, as well as add more configuration options.
- Improved Localization / Regionalization features provide full translation capabilities throughout the application.
- New Partial Corporate Merge option provides support for legal entity mergers with non-assignable contracts.
- Personalized Dashboards
- Stateless environment improves performance.
- Cleaner and more adaptive user interface.
- Improved Contract Management provides instant access to important information at your fingertips.
- Improved browser support, including FireFox 10.

Legal Entity Partial Corporate Merger

In addition to the Legal Entity merge options previously included in UpsideContract (Remove Duplicate, Corporate Merger, Single Relationship Merge & Selective Move); V7.2 includes a new Partial Corporate Merge option. This new merge type provides support for the merger of two legal entities where the source legal entity has non-assignable contracts. The merge operation consolidates all of the assigned contracts into the new entity and provides support for processing the non-assignable contracts.

Stateless Environment: Improved Performance

Performance and speed continue to be a key focus of UpsideContract. A stateless environment allows you to move through the contract lifecycle more efficiently. Capitalizing on the latest in Ajax technology ensures fast response times and seamless transitions between application areas.

Cleaner and More Adaptive User Interface

V7.2 is built around you and your requirements. The application adapts to your particular contracting processes and delivers what you need at each phase of your business workflow. The user interface is now even more adaptive and configurable.

Personalized Dashboard Views

Personalized dashboards are another great feature included in V7.2. Each dashboard can be configured to display a specific set of information and then made available for selection company wide. This enables users to quickly access subsets of information and streamline their processing times.

Conclusion

With more options to control the way contracts are created and managed, and a more intuitive and easier to use application, V7.2 gives users greater power to influence their entire business cycle from start to finish.

Ask an Upside representative about upgrading to UpsideContract V7.2 at 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, and 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 and Health Care), and Small & Medium Enterprise (SME) customers. Customers realize significant cost savings while improving customer and supplier relationships. Upside Software's solutions are deployed very quickly and 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, and comprehensive product suite. The company has extensive experience delivering real value to customers (about 300) of every size and in most industry verticals.

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