XOOMWORKS
PROCUREMENT

CLM
Supplier Guide

Index

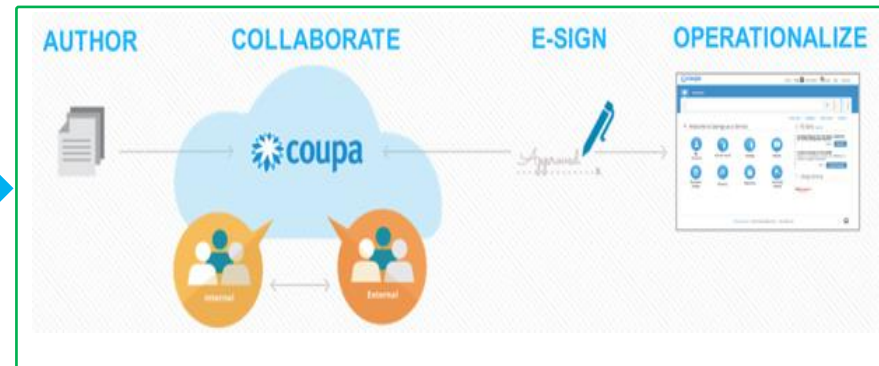# 1. Introduction to CLM

1. Introduction to CLM

Coupa CLM (Contract Lifecycle Management) manages the entire contract lifecycle, from creation to collaboration, negotiation, electronic signature, storage and operationalisation of contracts

It includes the operational and repository side of the contract (sometimes called Coupa Core or Coupa Enterprise) as well as the collaboration, authorisation and signature side (sometimes called Coupa Contract Collaboration, or CCC)
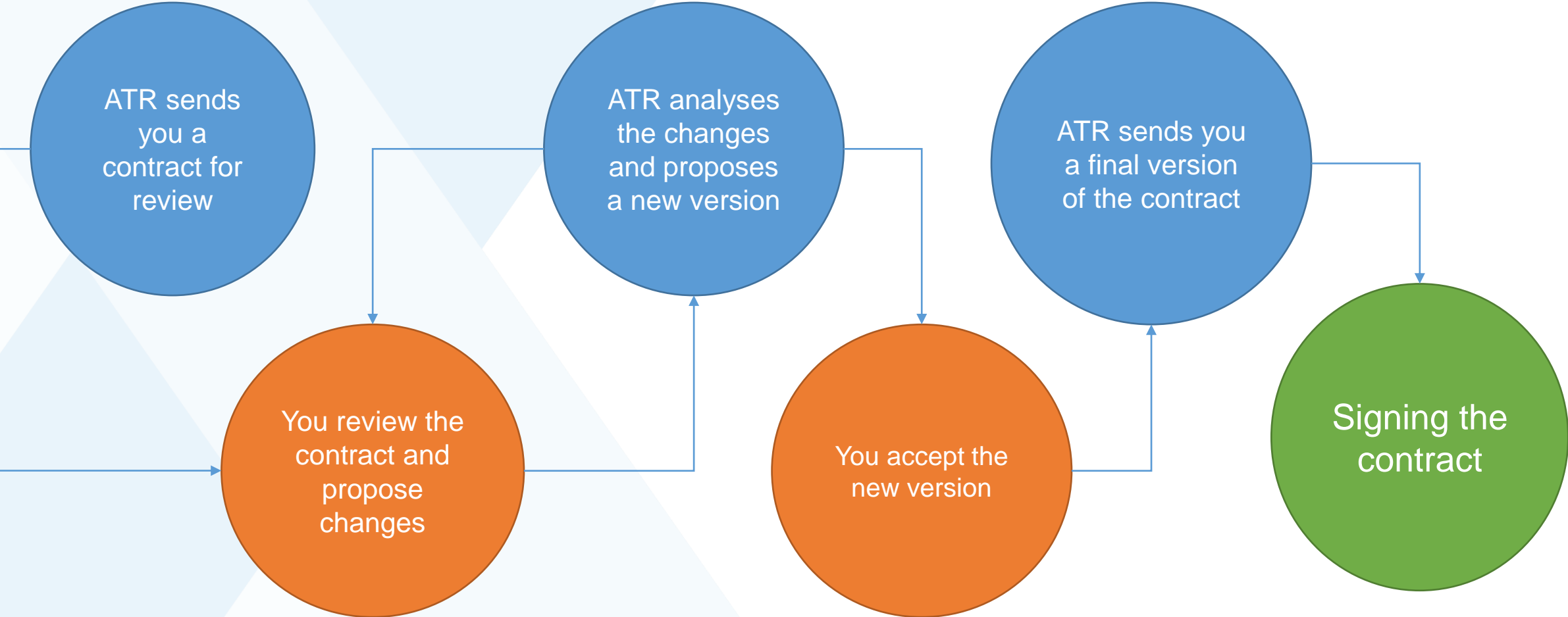
Does your contracting process look like this?

It could look like this:

AUTHOR COLLABORATE E-SIGN OPERATIONALIZE

1. Introduction to CLM

ATR sends you a contract for review

You review the contract and propose changes

ATR analyses the changes and proposes a new version

You accept the new version

ATR sends you a final version of the contract

Signing the contract

2. Collaborating in the creation of a contract

2. Collaborating in the creation of a contract

The ATR buyer in charge of your contract will draft an agreement on Coupa and will send you an e-mail notification inviting you to negotiate and collaborate on the contract.

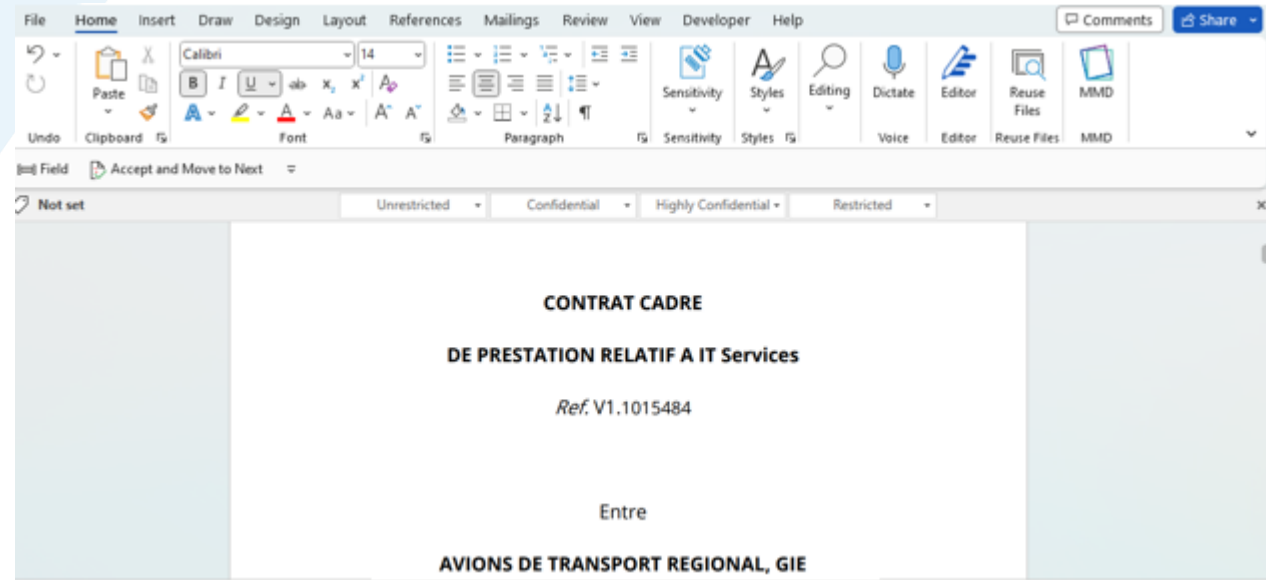1. From the invitation received from ATR, click on **"Open contract"** to open the contract.

2. Click on the **"Edit document"** button -> then click on **"Download for Edit"** to edit it. Open the downloaded file.
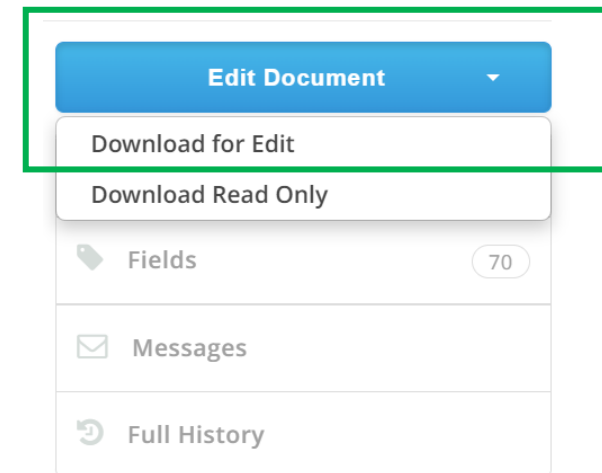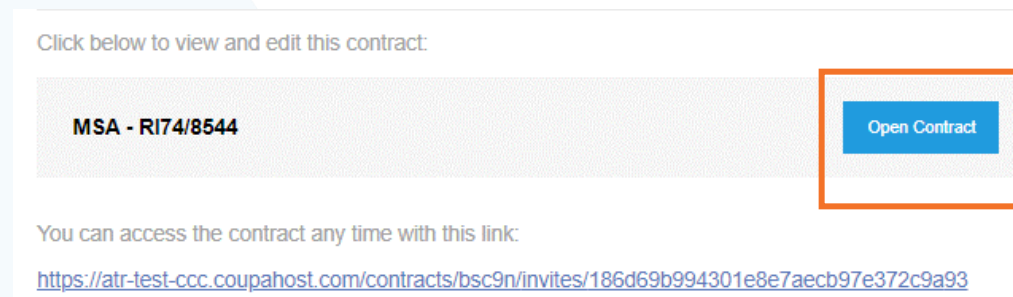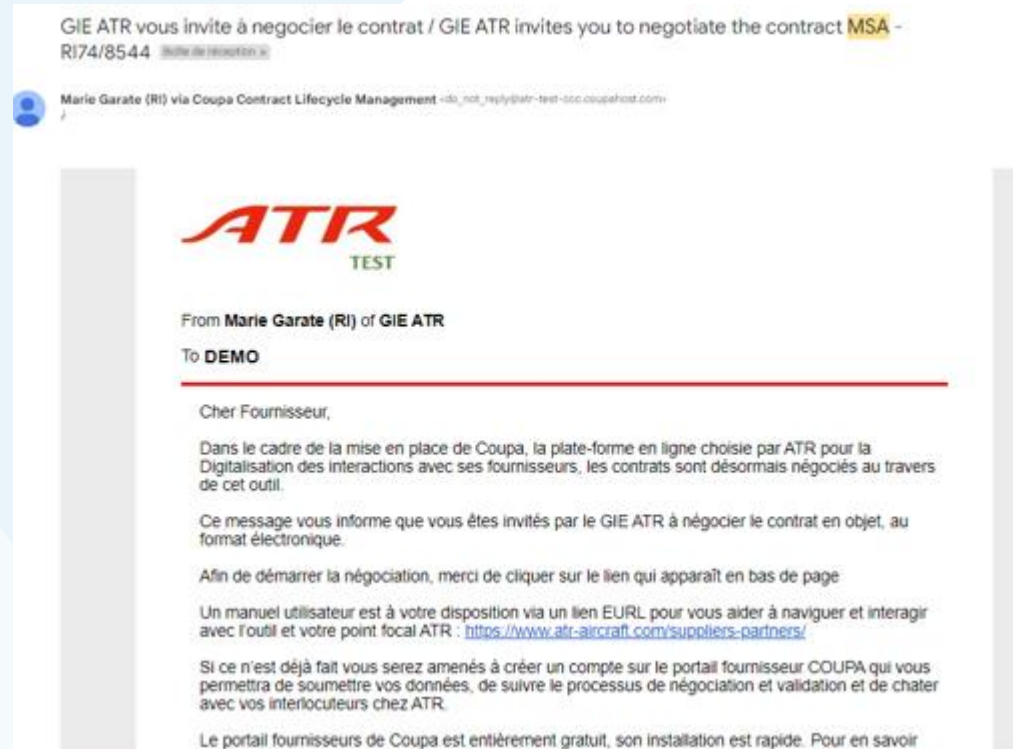
2. Collaborating in the creation of a contract

3. Make any necessary changes to the Word document and leave comments directly in Word if you need to.

Caution! The document is in Track Changes mode so that the buyer can review your changes.

2. Collaborating in the creation of a contract

4. Save the document and return to Coupa.

5. Click on **"Upload"** and **"Upload my changes"** and then upload the newly modified contract.

! After loading the contract, the pop-up window remains displayed for a few seconds. Do not click twice on "Upload my changes".

🔒 Locked by You Cancel Lock

Upload

Download

Send to Counterparty

Compare Versions

🏷 Fields

DOCUMENT UPLOAD

⬆ Upload my changes

Full History
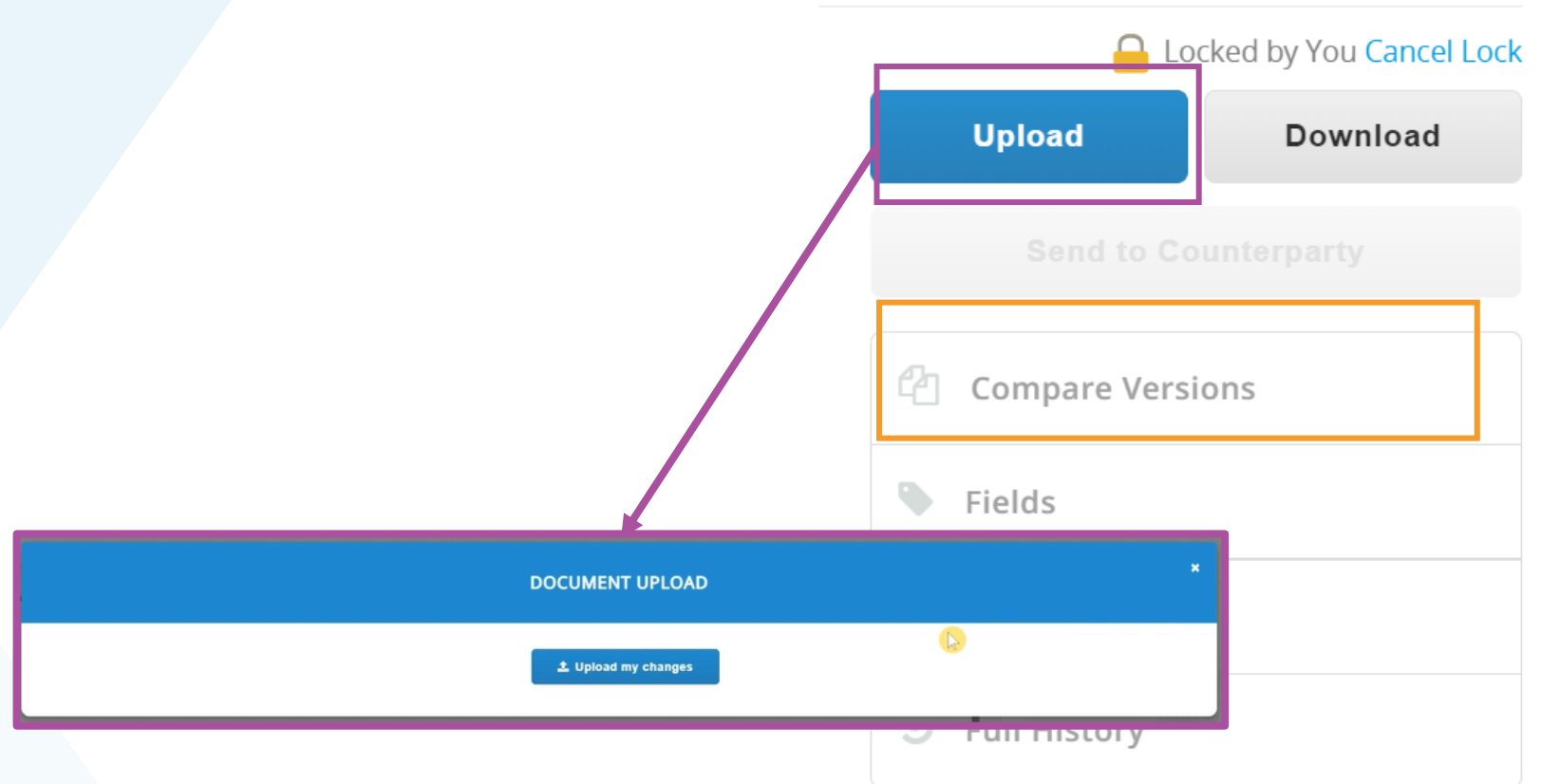
2. Collaborating in the creation of a contract

ATR can also send you documents attached to the contract.

6. Scroll down the sections on the right, and **click on each annex to download it**.

7. Go through the annexes and if necessary make changes and comments as you did for the main contract.

8. If you have made changes to an annex document, return to the **Contract Options** section and then **Attach File** and load the Word document.

Caution! Do not delete the old version of the annex in Coupa.

2. Collaborating in the creation of a contract

If the contract is also to be reviewed by a colleague from another department, you should invite them to collaborate on the contract.

➢ Click on **"Invite Colleague"** button and after entering the name and email address of the recipient, click on the **"Ask to"** button and then **"Review".**

➢ Type the message for your colleague and make sure you share this guide with them too. Click on **"Ask to review".**

If you don't need to invite a colleague, don't do these actions, but instead go to the next slide.

2. Collaborating in the creation of a contract

If the contract is to be reviewed by a third party (a company you have hired for legal advice, etc.)

Click on "**Invite Other Party**" and then fill in the contact details.

Type the message for your correspondent and make sure you share this guide with them too. Click on "**Send**".

If you do not need to invite a third party, do not do these actions and go to the next slide the next slide.

2. Collaborating in the creation of a contract

9. Once the contract is ready, click on the **"Send to Counterparty"** button.

10. Please close the contract window once you have finished reviewing it. As Coupa does not allow simultaneous editing, you are in danger of preventing other collaborators from working on the contract.

🔒 Locked by CLM Supplier

Edit Document ▼

Send to Counterparty

⎘ Compare Versions

3. Second round of collaboration

3. Second round of collaboration

1. From the new invitation to evaluate, click on **"Open contract"** to open the contract.

2. Click on the **"Edit document"** button -> Then click on Download for Edit to modify it. Open the downloaded file.

3. **Make the necessary changes**

4. Save the document and return to Coupa

Click below to view and edit this contract:

MSA - RI74/8544

Open Contract

You can access the contract any time with this link:

https://atr-test-ccc.coupahost.com/contracts/bsc9n/invites/186d69b994301e8e7aecb97e372c9a93

Edit Document ▾

Download for Edit

Download Read Only

🏷 Fields   70

✉ Messages

🕓 Full History

Ce Contrat Cadre de Prestation relatif à Repair services (le « **Contrat Cadre** ») est signé le 27 September 2022 (la « **Date d'Entrée en Vigueur** ») **: Nouvelle phrase ajouté par le fournisseur.**

3. Second round of collaboration

5. Click on **"Upload"** and upload the recently modified contract

6. Review the annexes as well, as shown on *slide 10*

7. Click on the **"Send to Counterparty"** button.
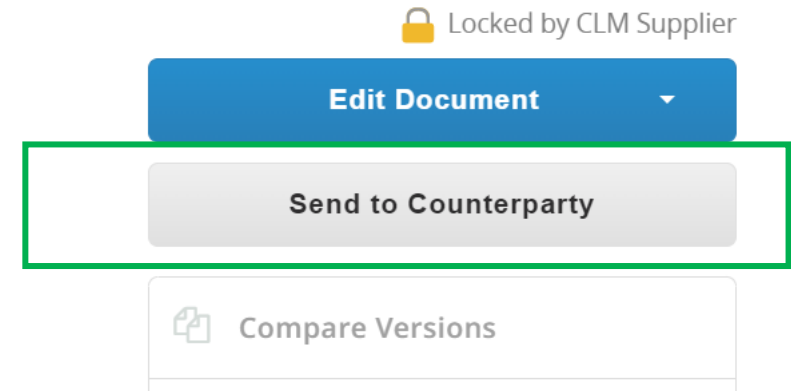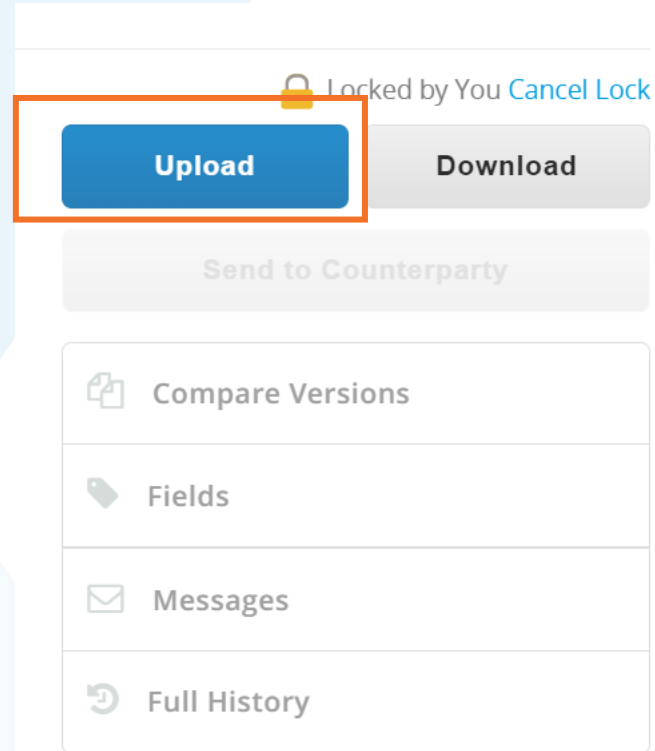
4. Final version and signature of the contract

4. Final version and signature of the contract

You may be involved in several rounds of negotiations, but the buyer will provide you with a read-only copy of the finalised contract once it is complete.

You will receive a new notification and you can click on **"Open Contract"** but the new page will only have one option, **"Download Read Only"**.

You can download and read the contract, but if you need to tell your buyer anything about the contract, please use the **Messages**.

4. Final version and signature of the contract

Once all changes to the contract are accepted, ATR will send you a notification to sign the contract through DocuSign.

5. Locked contract

5. Locked contract.

Be aware that after you have sent your proposals to modify the contract the client will take time to analyse everything.

This is why you will see **the hourglass icon** in orange, but also note that the draft will be **locked**.

You will not be able to make any changes until the new version is sent by ATR.

🔒 Locked by GIE ATR

Edit Document ▾

Finish Review

Commented [PPA1]: Test guide utilisateur CLM - ajout de commentaire

Commented [PPA2]: Test guide utilisateur - ajout de commentaire en tant que collaborateur interne

⏳
Reviews in progress

👤
Counterparty not invited

🔗
Not shared with counterparty

Negotiation Rounds

6. Errors in uploading the contract

6. Errors in uploading the contract

It may happen that after uploading the file you get the message "Upload successful, but we found 1 error in your fields" – if this is the case please:

Summary   Agreement   Items   Preferences

Upload successful, but we found 2 errors in your fields. Please fix them in the Fields menu before proceeding.   ✕
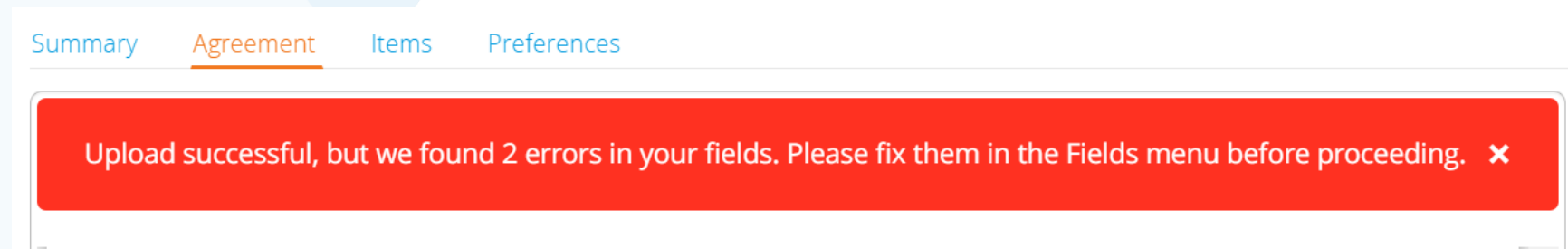
6. Errors in uploading the contract

If you encounter this problem you can correct it in the following way:

1. Click on 'Fields' on the right-hand side of the page.

2. You will see the error (or errors) in red.

Explanation: For this training, we have changed the name of the 'Demo Provider 4' to 'Demo Provider 5'. We have also changed a date pre-filled by ATR.

View Approval Chain

Reviews in progress

Counterparty not invited

Not shared with counterparty

Negotiation Rounds

Compare Versions

Fields   70

Messages

Attach Executive Summary

Different instances ✕ of the field 'Contract Supplier Display Name' have inconsistent values: Fournisseur Demo 4, Fournisseur Demo 5, Fournisseur Demo 4, Fournisseur Demo 4, Fournisseur Demo 4, Fournisseur Demo 4, Fournisseur Demo 4

Different instances ✕ of the field 'Contract Effective Date' have inconsistent values: February 8th, 2023, February 6th, 2023

6. Errors in uploading the contract

3. Find the file you just uploaded and edit it again to restore the original values.

ET :

FOURNISSEUR DEMO 5, SAS de droit FRANCE, dont le siè
BUILDING PARIS SUPPLIER PRIMARY ADDRESS ST
Commerce et des Sociétés sous le n°CONTRACT SUPPLIE

) est signé le February 8th, 2023 (la

ET :

FOURNISSEUR DEMO 4, SAS de droit FRANCE, dont l
BUILDING PARIS SUPPLIER PRIMARY ADDRESS
Commerce et des Sociétés sous le n°CONTRACT SUPP

») est signé le February 6th, 2023 (la

6. Errors in uploading the contract

4. Upload again. You will no longer see the error message.

DOCUMENT UPLOAD

⬆ Upload my changes

pte sera la première date de réception dans l'ordre

Summary   Agreement   Items   Preferences

spécifiques propres à son identité physique, physiologique, génétique, psychique, économique, culturelle ou sociale ;

« Prix »   désigne le prix du Livrable, tel qu'annexé au Contrat Cadre et/ou aux Conditions Spécifiques, selon le contexte, et comprenant des grilles tarifaires et les modalités de réalisation du Livrable, y compris tous frais et services ;

"Retard Excusable"   a le sens défini à l'Article 16.1 "*Retard Excusable*" ;

« Taxe »   désigne les impôts, retenues à la source, cotisations, taxes, droits d'enregistrement, droits et/ou taxes de toute nature, y compris notamment la taxe sur la valeur ajoutée (TVA), la taxe sur les biens et les services (GST), droits de douane ainsi que les pénalités, amendes ou intérêts y afférents, qui sont imposés, retenus ou perçus par toute autorité fiscale ou nationale ou par tout autre organisme gouvernemental, en relation avec l'objet du Contrat.
Par souci de clarté, est exclu toute taxe due par une Partie, conformément à la Loi de la juridiction fiscale où elle exerce l'activité relative à l'objet du Contrat, imposée sur,

🔒 Locked by GIE ATR

Edit Document ▾

Submit for Approval

View Approval Chain

⏳   👤   🔗
Reviews in   Counterparty   Not shared
progress   not invited   with
   counterparty

7. Comparing versions

7. Comparing versions

Click on the **Compare Versions** button in the right-hand panel to open a page where you can select the versions to be compared. For each version, you can see who checked a particular version and at what time. If you choose to compare non-consecutive versions, you will see all changes made between the two versions.

Deleted text is displayed in red, additions are displayed in green.

! Suppliers can only see versions that have been saved after being invited to the review cycle.
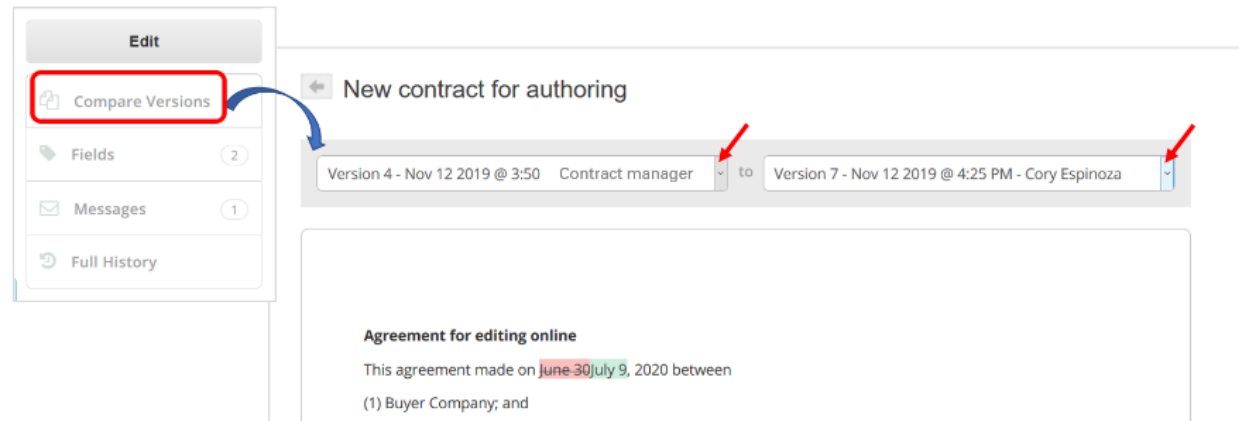
8. Messages

8. Messages

Click on the **Messages** button to the right of the contract:

In the window that appears, choose to send a message to everyone, to members of your organisation or to specific recipients.

You can send three types of messages:

➢ **Everyone**: All parties who can see this contract at the time of sending the message can see the message.

➢ **Specific persons (+Message)** : Only the people you specify can see the message.
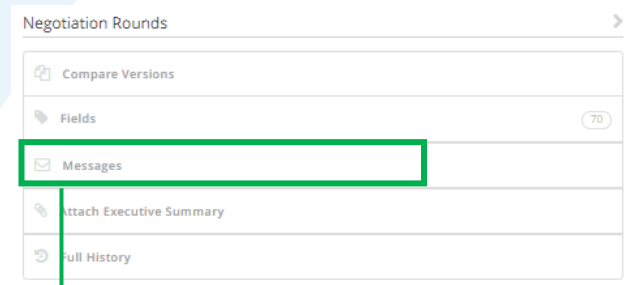
9. Uploading the insurance certificate
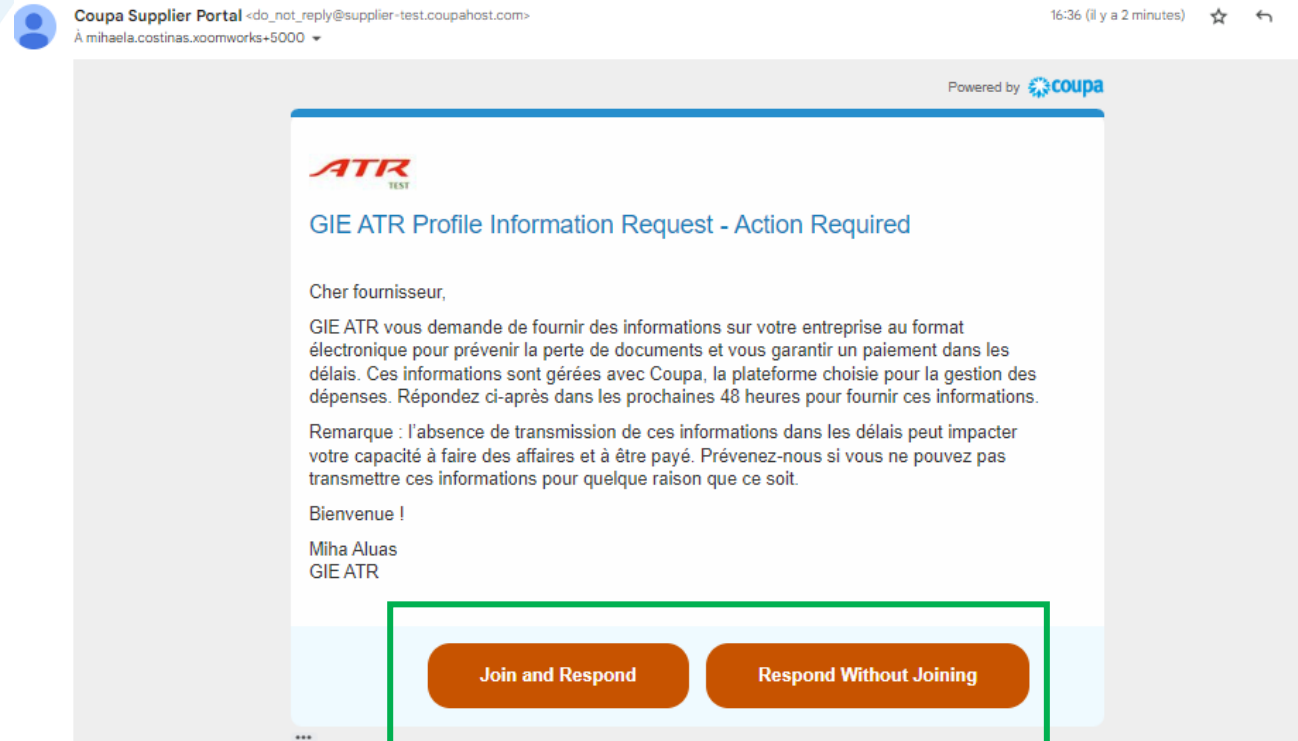
9. Uploading the insurance certificate

ATR will require your insurance certificate during contract negotiations.

When this certificate expires, ATR will contact you via a specific form that you will have to fill in.

So, after a certain period of time, you will receive an e-mail notification inviting you to fill in a form.
Click on one of the two buttons:

- **Join and Respond** (you can log in or connect to CSP – Coupa Supplier Portal)
- **Respond without joining** (you do not need to log in to CSP to answer the form)

9. Uploading the insurance certificate

Fill in the editable fields and then click on **"Submit for approval"**.