STANDARD FEATURES AND PROVISIONS

Evisort's Intelligent Contract Management Platform delivers AI-powered, end-to-end CLM capabilities that can be implemented in less that 30 days because Evisort supports 238 contract types and 64 contract fields and provisions out-of-the-box.

Overview of Evisort's Intelligent Contract Management Platform

Product

Contract Management	Contract Workflow

Intelligence & Automation

Artificial Intelligence including NLP, ML, Deep Learning, and Rules

Platform

Accessibility	Security & Data Privacy	Integrations & Add-ons

Services

Support, Solutions, and Digital Transformation

Contract Management

File Management

Smart repository
- Preserves file structures and names
- Integrates and automatically syncs files with Google Drive, Dropbox, Box, MS Office 365, MS Sharepoint, MS OneDrive, Egnyte, Amazon Cloud Drive, WebDAV, Yandex.Disk, Sugar Sync

Advanced Optical Character Recognition (OCR)
- Detects contracts objects such as logos, signatures, and tables
- Preserves contract objects

Import and extract data from both native digital and scanned documents, including .doc/.docx and PDF

File upload
- Manual
- Email intake, including auto-import from scanner

Automatic duplicate file detection, identification, and intelligent change management

Document Analysis

Artificial Intelligence
- Pre-trained on 238 contract types, including buy-side, sell-side, and general agreements
- Process any organization's paper, including third-party
- Metadata extraction: pre-trained on 27 contract fields
- Clause extraction: pre-trained on 37 contract provisions
- Advanced machine learning model that continuously improves
- Bulk provision tagging

Reporting
- Expiring contract insights
- Contract renewal insights
- Excel export

Document viewer and key information finder

Key fields and provision viewer

Edit contract data

Version control

Document Analysis (continued)

Search and group documents, including parent-child linking

Conditional and boolean text search

Automated and personalized alerts

Contract Workflow

Build, edit, and publish no-code templates and workflows

Contract workflow dashboard	▪ View contracts ▪ Monitor actions ▪ Track submissions
Execution and Post-Signature	▪ eSignature with DocuSign and Adobe Sign ▪ Wet Signature ▪ Post-completion workflows
Renew, Negotiate, and Approve	▪ Rule-based Access Controls and review logic ▪ Reassign and escalate contracts ▪ Auditable activity log ▪ Version control ▪ Edit and reline with MS Word ▪ Share with counterparties via download, email, or link
Contract Generation	▪ Self-serve intake form ▪ Auto-populate contract fields with intake data ▪ Draft fields and provisions based on defined logic

Platform & Accessibility

Self-serve permission settings and user access privileges

Role-based Access Controls

Platform & Accessibility (continued)

Groups or Teams of Users

SSO including Okta, Azure, AD, and SAML

Evisort's Multi-tenant cloud is hosted on AWS

Security & Data Privacy

Security Policies based on ISO 27001 standards

SOC 2 Type II Certified

Penetration Tested 2x Year

Encryption at rest and transit (AES256)

WW bug-bounty program

Dedicated Security Team

GDPR Compliant

Integrations & Add-ons

API

Evisort Contract Management for Salesforce

Services

Support

- Resource Center & Help Center
- Email
- Live Chat
- Callback Service

Customer Success & Solution Architects

Digital Transformation

Available AI Fields – Out of the Box

Field Name	Definition / Help Text
Breach Notice	Data Breach or Security Breach Clause addresses what happens when there is a breach , for example: how many days you have to notify and who you notify.
Contract Type	"The type of a contract. We support 238 contract types out of the box. The top five most common are: Services Agreements, Letter Agreements, Amendments, Non Disclosure Agreements, and Statements of Work."
Counterparties	Contracting parties for the agreement
Duration of Confidentiality Obligation	Some confidential information may need secrecy to extend beyond the end of the business relationship but others will require secrecy to continue to apply even after the termination of the business relationship.
Effective Date	Effective date of the agreement
Executed	Whether the agreement contains at least one signature or not. Signatures can be handwritten or electronic.
Governing Law	The state or country that governs the contract
Initial Expiration Date	The initial expiration date of the contract, before any potential renewal
Initial Term	The term length of the agreement
Internal Parties	If a list of internal entities is provided, our platform can separate Internal Party from the Counterparties field
Language	The language(s) present in a contract
Liability Cap Amount	If explicit, the total liability cap amount
Liability Cap Currency	If explicit, the liability cap currency
Liability Cap Multiplier	if the Liability Cap Type is 'Amount Paid', the multiplier applies to the amount paid to calculate the liability cap
Liability Cap Text	The text mentioning the liability cap in the limitation of liability clause
Liability Cap Type	"Amount Paid: relative to the total amount paid in the contract Fixed Amount: an explicit, fixed cap"
Governing Law	The state or country that governs the contract
NDA Type	Is the NDA one way or two ways?
Number of Renewals	The number of renewals available if the renewal type is automatic or there is an option to renew
Payment Term (Net Days)	The payment term(s) of the contract
Renewal Notice Date	The calculated date to give a notice by to opt out from a renewal, if the renewal type is automatic or there's an option to renew
Renewal Notice Period (Days)	The advance notice to give to opt out from a renewal, if the renewal type is automatic or there's an option to renew, in number of days
Renewal Term	The term length of a renewal if the renewal type is automatic or there is an option to renew

Renewal Type	"Three options: Automatic: contract renews automatically after expiration Option to Renew: contract does not renew automatically but the option exists for one party (not by mutual agreement) Manual: automatic renewal either requires mutual agreement, is explicitly forbidden or not mentioned"
Start Date	Start date of the term of the agreement, also can be referred to as the Commencement Date
Termination For Convenience Notice (Days)	
Text Quality	The OCR quality (high, medium, low), for english contracts only
Title	The title of a document, extracted from the text of the contract. This is usually different from the filename

Available Provisions – Out of the Box

Provision Name	Definition / Help Text
Assignment	Affects the ability of one or both parties to sell or transfer their rights under the agreement to another party.
Attorney Fees	Delineates various fees related to legal proceedings and other related costs as well as which parties are responsible for such costs
Bankruptcy	States that if the party in question experiences bankruptcy or any of a series of related circumstances, then depending on the contract, either the other party may terminate the contract or the contract will terminate automatically; Referred to as "Ipso Facto Clause"
Change of Control	A provision in an agreement giving a party certain rights (such as consent, payment or termination) in connection with a change in ownership or management of the other party to the agreement.
Compliance with Laws	Specific laws that are relevant for compliance within an agreement
Confidentiality	A provision that states information is to be kept confidential, thus barring the receiving party from disclosing the information
Data Breach	Details what actions the parties must take upon the occurrence of any unauthorized access or theft of online data.
Entire Agreement	Identifies bodies of text as consisting of the entire agreement
Force Majeure	Establishes that the agreement will be suspended in the event of unforeseen disasters (such as earthquakes, hurricanes, floods, pandemics, and so on).
General Definition	Definition of Confidential Information by Agreement
General Exceptions	Definition of information not considered Confidential Information
Governing Law	Determines which state or country's legal rules will be applied in the event of a lawsuit.
Indemnification	Either or both parties agree that they will cover the costs of certain disputes related to the contract brought by third parties.
Injunctive Relief	Aspects of the agreement related to remedies or relief issued by a court that vary from equity to restraining orders
Jurisdiction and Venue	The location whose laws apply as well as specific locations to handle contract disputes
Legally Mandated Disclosure	Details the circumstances under which a party may disclose confidential information when required to do so by law, judicial body or government agency.
LIBOR Discontinuance	Fallback language laying out what happens if LIBOR is no longer available.
LIBOR Rate	The definition of LIBOR, LIBOR Rate and LIBOR related Rate.
Liens	Clause that grants Custodian a continuing general lien on securities until the client covers their expenses owed or credit exposure to the Custodian
Limitation of Liability	Sets a cap or otherwise limits the types of damages that may be awarded to either or both parties in a contract dispute.

No Warranties	Disclaimers of warranties and accuracy of shared information, often used for liability purposes
Non Compete	Clause under which one party agrees not to enter into or start a similar profession or trade in competition against another party.
Non Solicitation	An employee agrees not to solicit a company's clients or customers, for his or her own benefit or for the benefit of a competitor, after leaving the company.
Overdraft	Bars custodian from making payment or transfer of funds on behalf of a Fund for which there would be insufficient funds held by the Custodian on behalf of the Fund.
Ownership of Information	Delineates which parties or combination of parties owns various information within the agreement
Permitted Disclosure	Entities and groups that involved parties may disclose another party's confidential information, including conditions of court order
Publicity	Prevents each party from issuing press releases, making any public announcements, or communicating with the media without the consent of the other party.
Purpose	The primary reason behind entering an agreement (usually NDA)
Return or Destruction of Confidential Information	Obligation to return or destroy Confidential Information upon a condition, usually termination
Right of First Offer or Refusal	A contractual right that gives its holder the option to enter a business transaction with the owner of something, according to specified terms, before the owner is entitled to enter into that transaction with a third party.
Setoff	Gives a lender the authority to seize a debtor's deposits when they default on a loan.
Standard of Care	Clause that defines and sets expectation of counterparty to exercise reasonable care in applying their knowledge, experience, and judgement
Survival	Aspects of the agreement that persist past termination
Term	Defines the period during which the agreement is effective, subject to earlier termination in accordance with its terms.
Termination	Allows for the agreement to be terminated, or ended, under circumstances specified in the clause.
Termination for Breach	Terms that define how a breach notice and termination will be handled between two counterparties when one believes the other has materially breached any obligations
Termination for Convenience	Termination of a contract by a counterparty in its best interest and in its sole discretion