



Contract Insight® Enterprise Auto-Extract

With CobbleStone Contract Insight® Enterprise, managing contracts just got easier with the auto-extract feature. CobbleStone Contract Management Software Enterprise Edition provides better usability via the 'add contract from file' feature found in earlier versions. Below are some features that help your team add contracts faster with a file auto-extract feature. [Note: this feature is not the same as the bulk auto-extract feature that can traverse through a directory of files in a folder OCR the file and extract text based on rules and auto import the data into the Enterprise system]. This 'in-application' feature is built to help contract professionals add contracts to the system (on an ongoing basis) faster with an auto extract feature and when coupled with the existing workflow (field monitoring), the system can auto validate field and clause data and route workflow tasks based on set conditions).

<p style="text-align: center;">CONSULTING AGREEMENT</p> <p>This Consulting Agreement (the "Agreement") is made and entered into October 8, 2018 (the "Effective Date") and expires on October 8, 2019 by and between CobbleStone Software, a S- corporation duly organized under law and having an usual place of business at California (hereinafter referred to as the "Company") and ABC Company with offices (hereinafter referred to as the "Consultant").</p> <p>WHEREAS, the Company wishes to engage the Consultant to provide the services described herein and Consultant agrees to provide the services for the compensation and otherwise in may not assigned accordance with the terms and conditions contained in this Agreement,</p> <p>NOW THEREFORE, in consideration of the foregoing, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, accepted and agreed to, the Company and the Consultant, intending to be legally bound, agree to the terms set forth below.</p> <p>1. TERM. Commencing as of the Effective Date, and continuing for a period of Two (2) years (the "Term"), unless earlier terminated pursuant to Article 4 hereof, the Consultant agrees that he/she will serve as a consultant to the Company. This Agreement may be renewed or extended for any period as may be agreed by the parties.</p> <p>2. DUTIES AND SERVICES.</p>	<p>Country/Postal Code: <input type="text"/></p> <p>Save Company & Refresh keyed data below will need to be re-keyed in</p> <hr/> <p>Effective Date</p> <p><input type="text" value="10/8/2018"/> <input type="button" value="Calendar"/></p> <p>Expiration Date</p> <p><input type="text" value="10/8/2019"/> <input type="button" value="Calendar"/></p> <p>Notify Days</p> <p><input type="text" value="60"/></p>
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Contract Insight® Auto Extract Text and Field Mapping

CobbleStone Contract Insight® Enterprise includes an improved feature related to the existing 'add contract from file' feature found under the 'Contracts' top menu. Contract Insight® Enterprise provides better contract processing and control with the 'add contract from file' feature found in earlier versions. This includes the ability to map out areas of standard formatted contract files related to newly added contract records (via the Contracts | 'Add Contract from File' menu). This feature offers auto (configured) extract fields & sections of the document to Contract Fields on the Contract Record and detects if the file is a non OCR'd PDF file, the system will enable a PDF OCR feature (note: OCR results & speed may vary) (in-system auto extract works well with MS Word Documents and PDF Documents). Prior to using this auto extract feature, the rules for the auto extract must be set up by an application configuration user (System Admin User) via the Manage/Setup | Auto Extract Settings menu (image seen below).



Simple Configuration Example

Prior to using this auto extract feature, the rules for the auto extract must be set up by an application configuration user (System Admin User) via the Manage/Setup | Auto Extract Settings menu (image seen below).

Setup	Help	Log Out
Employees		▶
Field Manager		▶
Reference Data		▶
Application Configuration		▶
Contract Occurrence		
Auto Extract Settings		
Document Templates		▶
Manage Security Groups		

The System Admin User should configure these auto extract rules for standard contract documents (hence, contracts that have similar layouts like, NDA, leases, licenses, etc.). Below is a typical screen shot of some simple configurations.

As an example, the first lone item (in the image below) and titled 'Audit – Effective Date' is set to recognize a Date for 'Audit' (excluding the single quotes) Contract Types and extract date text between the areas that start with 'Date:' (excluding the single quotes) and ending with 'Office of the'... It will auto map (if the data is proper) in to the Contract Start/Effective date (Contract_Start_Date) field.

The forth line item (in the image below) is configured to recognize and extract the Contract Amount text from a standard Distributor contract (not shown) and extract the date into the Contract Amount (Contract_Amount) field for Distributor Agreements (contract types) based on the text found between the starting text of 'not exceed' (excluding the single quotes) and ending text of '("Contract Amount")' (excluding the single quotes) found in the document.



Contract Extract Map List						
<input type="button" value="Add Record"/>						
Page: 1 of 1		Go		Page size: 5		Change
Item 1 to 5 of 5						
Manage	ExtractName	For Document Type	For System Area	Is Active	Start Text	End Text
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Manage	Audit - To	Consulting Agreement	tblContracts	1	Issue to:	Expiration Date
Manage	Contract Title	Consulting Agreement	tblContracts	1	Contract	Title
Manage	Counterparty Name	Consulting Agreement	tblContracts	1	") and	of
Manage	Distributor Agreement - Contract Amount	Consulting Agreement	tblContracts	1	not exceed	("Contract Amount")

Your system should be configured by a trained System Administrator and your actual system's configuration will vary (these are only sample serious).

Below are some features that help your team add contracts faster with a file auto-extract feature. [Note: this feature is not the same as the bulk auto-extract feature that can traverse through a directory of files in a folder OCR the file and extract text based on rules and auto import the data into the Enterprise system]. This 'in-application' feature is built to help contract professionals add contracts to the system (on an ongoing basis) faster with an auto extract feature and when coupled with the existing workflow (field monitoring), the system can auto validate field and clause data and route workflow tasks based on set conditions).

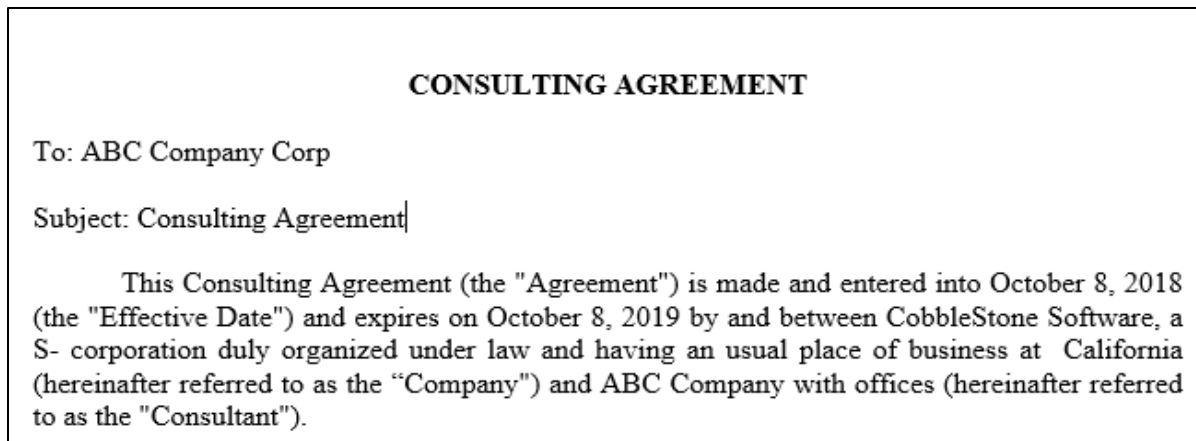
End-User Use

The 'in-system' auto extract features helps end-users do their job faster and (coupled with Workflow Manager) the organization monitor rules around contract data values as contracts are added to the system. For example, the end-users can use this feature to minimize their typing for larger volume of standardly formatted contract documents. The organization may configure "workflow rules" via the Workflow & Alerts Manager [not discussed in this section] to send automated alerts based on Contract Field values including but not limited to contract amounts, departments, users, clauses, dates, etc.

In this example, we will use the Distributor Rules (see in the sections above for configuration) to add a Distributor Contract to the system and let it auto-extract and auto field map several fields (including the Subject and Start Date and End Date).



Below is a scaled image of our sample contract with cover page:



In the image above, the system has been configured to extract the subject from any text found between the text 'Subject:' (without quotes) and the text 'Thank you for contacting' (without text) and map it to the Subject field of the contract record. In addition, on page 3 is the Effective (Start) Date and the Expiration (End) Date of the agreement. We have configured the system to extract the Effective Date based on the text found between the 'effective on' text and 'and expires on' text respectively (without quotes); and extract the Expiration date based on the 'expires on' and '("expiration date")' text (without quotes).



The rules configured for this document type is seen below:



Contract Extract Map List

[Add Record](#)

Page: 1 of 1 Go Page size: 5 Change Item 1 to 5 of 5

ExtractName	For Document Type	For System Area	Is Active	Start Text	End Text
Audit - To	Consulting Agreement	tblContracts	1	Issue to:	Expiration Date
Contract Title	Consulting Agreement	tblContracts	1	Contract	Title
Counterparty Name	Consulting Agreement	tblContracts	1	") and	of
Distributor Agreement - Contract Amount	Consulting Agreement	tblContracts	1	not exceed	("Contract Amount")

After the rules have been configured as per the instructions above, the End-User can now easily add new contract records with documents and use the auto-extract feature. [We have saved this file as PDF for example purposes but works equally as well with a Word document.]. In the image below, we select the 'Add Contract from File' menu from the 'Contracts' main menu and select the Distributor Contract Type and selected the correct PDF file. Next, we select 'Continue'. [seen below]

Add New Contract Record from File

1. select a type: Consulting Agreement

2. select a file: Consulting...ample.docx file notes:

Browse to select file and click Continue.



The system will attempt to auto extract text (if the PDF has not been OCR'd, it will prompt you to OCR the file). Next, the system will attempt to auto extract and map fields (seen below):

Add New Consulting Agreement Record

Extracted text from file: [Consulting Agreement - example.docx](#)

Preview Text Extract

CONSULTING AGREEMENT This Consulting Agreement (the "Agreement") is made and entered into October 8, 2018 (the "Effective Date") and expires on October 8, 2019 by and between CobbleStone Software, a S- corporation duly organized under law and having an usual place of business at California (hereinafter referred to as the "Company") and ABC Company with offices (hereinafter referred to as the "Consultant"). WHEREAS, the Company wishes to engage the Consultant to provide the services described herein and Consultant agrees to provide the services for the compensation and otherwise in may not assigned accordance with the terms and conditions contained in this Agreement, NOW THEREFORE, in consideration of the foregoing, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, accepted and agreed to, the Company and the Consultant, intending to be legally bound, agree to the terms set forth below. 1. TERM. Commencing as of the Effective Date, and continuing for a period of Two (2) years (the "Term"), unless earlier terminated pursuant to Article 4 hereof, the Consultant agrees that he/she will serve as a consultant to the Company. This Agreement may be renewed or extended for any period as may be agreed by the parties. 2. DUTIES AND SERVICES. (a) Consultant's duties and responsibilities shall be (collectively, the "Duties" or "Services"). (b) Consultant agrees that during the Term he/she will devote up to Ten (10) days per month to his/her Duties. The Company will periodically provide the Consultant with a

Counterparty Name - Quick Add: _____

Vendor/Customer Name: _____

Street: _____

City/State: _____

Country/Postal Code: _____

[Save Company & Refresh](#) | [Keved data below will need to be re-keved in](#)

Details

*Contract Title: Consulting Agreement Counterparty Name: ABC Company Corp

*Type: Consulting Agreement

*Contract Owner: Jones, Bradford

*Department: _____

Typically, the system will auto map the fields, however, a user should review the auto extracted fields and complete any other required fields, then click the 'Continue' button seen above. The system will save the record, attached the original file and bring the user to Contract Details Screen (see below). If there are configured Workflow monitoring rules, the workflow engine will process the Workflow tasks as configured in the Workflow manager (not seen here).



Contract Details

Details ✎

Contract Title Consulting Agreement	Counterparty Name ABC Company Corp	Type Consulting Agreement
Contract Owner Jones, Bradford	Department Operations	Category Confidentiality
Description Consultant agrees to provide the services for the compensation and otherwise in may not assigned accordance with the terms and conditions contained in this Agreement, NOW THEREFORE, in consideration of the foregoing, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, accepted and agreed to, the Company and the Consultant, intending to be legally bound, agree to the terms set forth below	Status Active	

File Browser / Explorer: Root Folder ?

Drag a column header and drop it here to group by that column

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By	Collaborator Type	Checked Out To	Last Viewed By	Last View Date	Ver.
	Consulting Agreement - ABC Corp.doc				9/20/2011 2:22:33 PM	Egan, Connie	Internal	~	~		1

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

About CobbleStone

CobbleStone is one of the leading contract management software companies worldwide. We are best-of-breed company, which means 100% of our efforts are focused on providing better contract management software to help you manage contracts better. We have been focused on this goal since 1995. We have thousands of users with over 3 million contracts managed by Contract Insight®. Leading companies use Contract Insight®.

What Does This Mean to You?

When you select CobbleStone Contract Insight® software to manage your contracts, your organization will better manage vendor and customer agreements between each party, better



negotiate renewals, comply with regulatory agencies, and enjoy more time on focusing on your value to the company and not chasing contracts. To ensure you receive the service you expect, you are assigned an Account Manager who will know your needs, your business, and help you get things done. All of our people are in-house and work for CobbleStone; this means you will receive proactive support and advice. In addition, we provide a great SLA, which means you are guaranteed a 99.9% per uptime and if things don't work out, we provide you a credit. That is a product & customer service you can rely on.