

## CONTRACT MANAGEMENT WITH SHAREPOINT AND MICROSOFT 365

Shareflex Contract lets you keep track of your contracts wherever you are. Bring order to your digital contract management and keep an eye on all deadlines.

User-friendly, secure and efficient



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MANAGING CONTRACTS WITH SHAREPOINT ONLINE? SURE!

Contracts are the foundation of every business relationship. Companies enter into contracts with customers, suppliers, employees, real estate companies, affiliated companies and many other business partners. And contracts are concluded in all areas of a company. As the number of contracts increases, so does their complexity, and over time it becomes increasingly difficult to keep track of all the contractual documents, agreements, terms and deadlines.

SharePoint Online is the ideal platform for contract management. Collaboration tools, central data storage and integrated document management – including version management and full text – are already included as standard. In combination with Shareflex Contract, contracts can be managed securely and efficiently throughout their entire life cycle. And thanks to the user-friendly interface, the application is also extremely intuitive to use.

FRANK MERBECKS, CONTRACT MANAGER AT OSRAM

„As an internationally operating company, we have many customers who also operate internationally. They are looked after by our IKAMs (International Key Account Managers). And since there are not only global but also local contracts, we were looking for a way to make these contracts available to the IKAMs at any time, without having to find out about the existence and content of the contracts locally. Because SharePoint is a company-wide strategy at OSRAM, the Shareflex Contract solution from Portal Systems was an ideal fit for our solution strategy.“



## KEEP YOUR CONTRACTS ORGANISED AND SECURE — ACROSS THE ENTERPRISE AND ACROSS ALL SECTORS

Shareflex Contract helps your company to bring order and security to contract management, regardless of the industry in which you operate. With Shareflex Contract and the integrated modules, contracts can be managed securely and efficiently throughout their entire lifecycle.

### STANDARD ANPPLICATION

The Shareflex Contract solution is a pre-configured standard application for professional contract management in the cloud. Eight different contract types are already included in the standard product. The integrated workflow management system Shareflex Flow is also part of the product standard, with which rule-based as well as ad-hoc workflows can be defined and executed. The system is available in English and German.

The solution can be deployed quickly and integrates seamlessly with your existing Microsoft 365/SharePoint online infrastructure. No additional servers or IT infrastructure components are required. All created contract data and documents remain secure in your Microsoft 365 tenant.

Shareflex Contract is based on Portal Systems' Shareflex ECM Online product suite and can be easily extended with additional components such as electronic file management or workflow-based, standards-compliant document management.

*The main features at a glance*



# Understanding processes. Finding solutions.



## SHAREFLEX<sup>®</sup> IS THE LEADING PLATFORM FOR SHAREPOINT-BASED BUSINESS APPLICATIONS

Shareflex and the solutions based on it are currently (as of January 2023) in use at more than 300 companies in various industries — from start-ups to DAX-listed corporations.

Our customers very often pursue a "two-platform" strategy, whereby SharePoint serves as a platform for many (or even all) non-ERP business applications and processes in addition to SAP or MS Dynamics (365) as the company-wide ERP system.



As a result, Shareflex is becoming the most important building block for the majority of customers in the implementation of their own Microsoft 365 and SharePoint strategy.

Shareflex helps companies to significantly reduce the complexity of SharePoint and to easily deploy highly functional, integrated and user-friendly business applications based on standard products.

In addition, Shareflex offers pre-configured solutions for various specialised applications, such as contract and document management (DMS), document control or incoming invoice processing.

All business applications provided as part of the Shareflex ECM Online product suite are based on the same "solution engine", have an identical "look & feel" and can be implemented in the respective departments without much training effort.

Shareflex itself does not store any information. Your data and documents all reside in your Microsoft 365 environment, securely stored in the Microsoft cloud from a compliance and security perspective.

In the following chapters we will introduce you to the different components of Shareflex Contract, the solution for contract management.

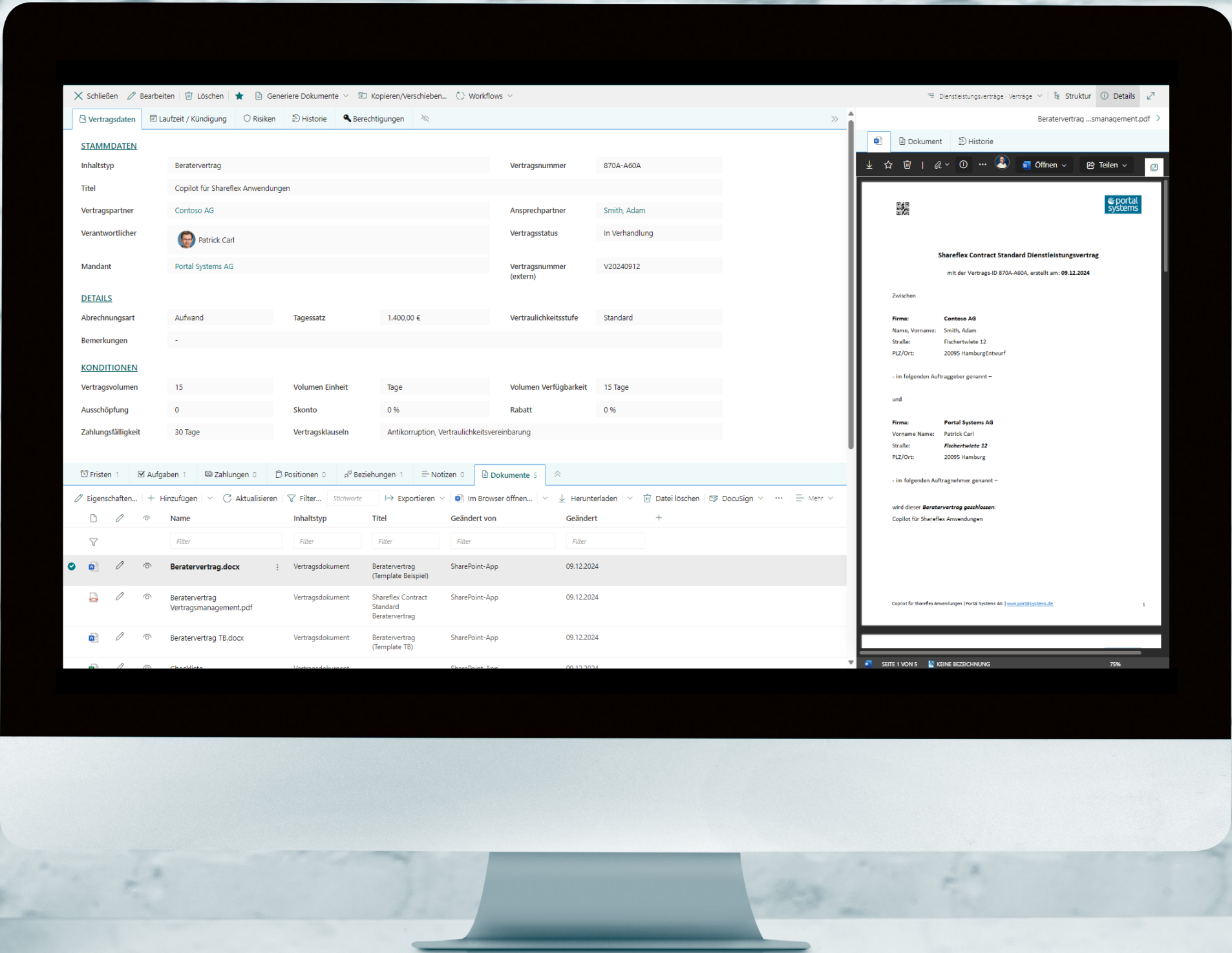




## WEB-BASED, USER-FRIENDLY INTERFACES

By default, Shareflex Contract offers user-friendly interfaces optimised for SharePoint Online. All information and documents associated with the contracts to be managed are clearly arranged and available at a glance.

As a result, the operation of the contract management system is easy to learn and does not require any extensive training.

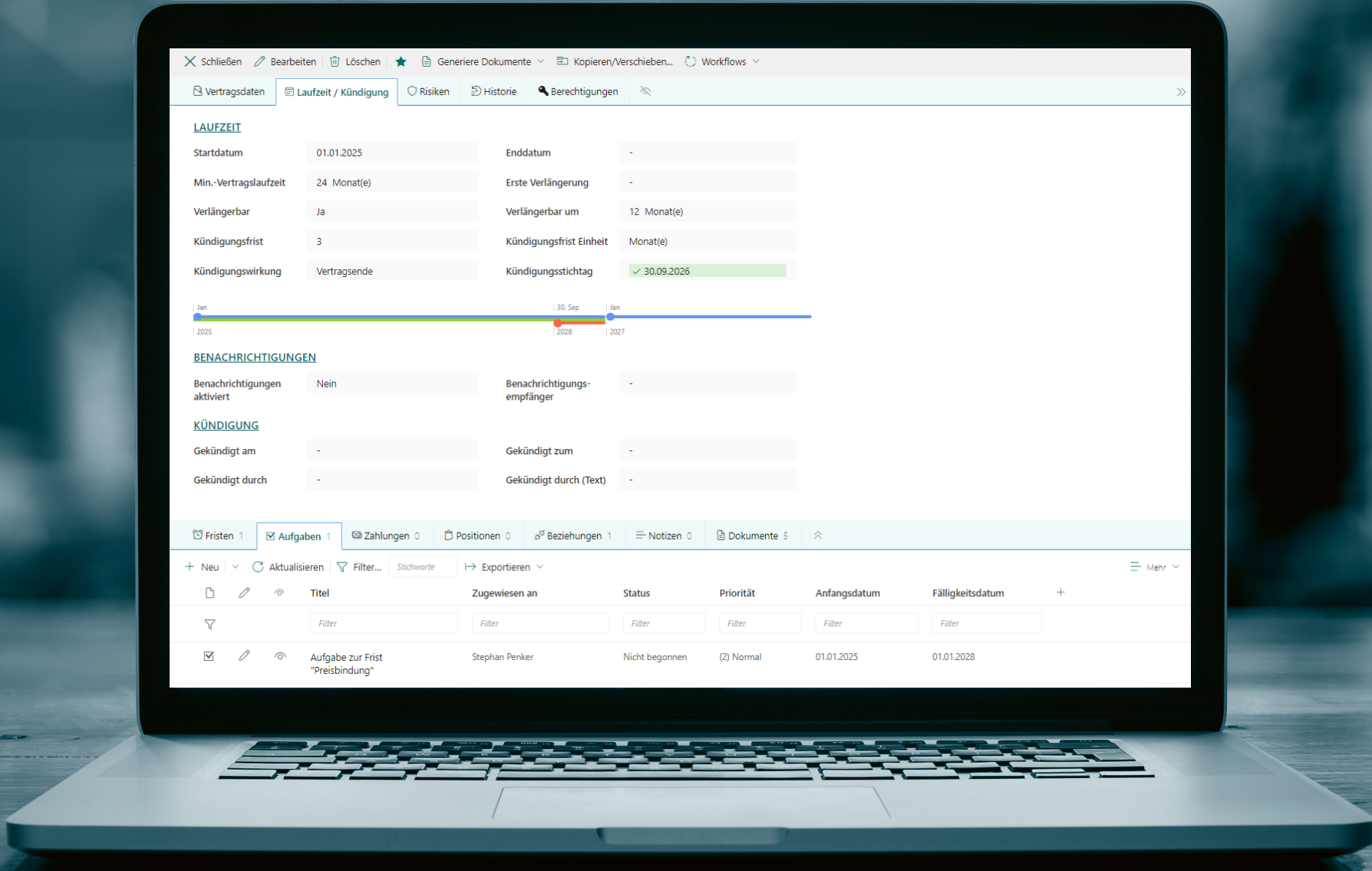


### DEADLINES, DATES AND NOTIFICATIONS

Shareflex Contract makes it easy to record and manage contract periods, dates and reminders. Dates and cancellations are automatically calculated as part of the solution. The graphical representation of the contract term and notice period is an excellent supplement to the date information.

Standard contract periods can be entered, as well as individual periods. An integrated notification system informs via email before deadlines or tasks are reached. In the same way, other tasks for the contract can be entered manually and/or based on rules, so that deadlines during the year can also be managed by the system. Where necessary, these tasks can also be synced with Outlook tasks using SharePoint Online.

### TERMINATION DATE AND PERIOD





## FLEXIBILITY AND EXPANDABILITY

You can adapt the contract types supplied with the basic system to suit your business needs at any time, or extend the contract management to include other contract types.

An integrated form designer helps you customise the user interface. Business administrators can also easily and flexibly assign permissions using an integrated permission editor. Simple roles and rules as well as complex authorisation structures can be mapped.

All changes to the contract management, the user interface, the authorisation rules and the background processes can be made while the system is running. This means you are always flexible and can adapt globally deployed systems to suit your business. The system grows in sync with your business needs.

## CONTRACT RELATIONS

Shareflex Contract is a powerful tool for the transparent management of a wide range of contract relationships. There are many different use cases for contract relations. The three most important scenarios are as follows:

### CONTRACT IS REPLACED BY ANOTHER CONTRACT

A specific contract (e.g. leasing contract) is terminated or expires (fixed-term contract) and is replaced by a new contract (e.g. subsequent leasing contract).

### CONTRACT IS RELATED TO ANOTHER CONTRACT

A specific contract (e.g. service contract) is concluded, but in its context another contract is also legally valid (e.g. confidentiality agreement).

### CONTRACT IS SUBORDINATE TO ANOTHER CONTRACT

A specific contract acts as a parenthesis or master agreement (e.g. mobile phone framework agreement) and defines basic clauses uniquely and superordinately. Corresponding subcontracts refer to this master agreement and define specific details (e.g. individual mobile phone contract).

It is possible to assign one or more relationships to each contract that is managed with Shareflex Contract. The relationship is always and automatically established in a bi-directional way.

The Form Designer

Fristen 1	Aufgaben 1	Zahlungen 0	Positionen 0	Beziehungen 1	Notizen 0	Dokumente 5	
<div>+ Neu   Aktualisieren   Filter... Stichworte   Exportieren</div>							
			<b>Titel</b>	<b>Beziehungstyp</b>	<b>Vertrag</b>	<b>Vertragsart</b>	
			<input type="text" value="Filter"/>	<input type="text" value="Filter"/>			
			Copilot für Shareflex Anwendungen	Untervertrag zu	Rahmenvertrag Dienstleistungen ...	Rahmenverträge	



## ECONOMIC EFFICIENCY

Shareflex Contract gives you a complete picture of all your contracts. Across the whole company.

In addition to the proper contract documents, Shareflex Contract also manages deadlines, appointments, notes, contract risks, payments and payment plans, as well as resubmissions.

With our integration components, we make the best use of your existing IT infrastructure, avoiding redundancies or duplication. With Shareflex Contract you can expect a fast ROI. That's a promise!

## ERP INTEGRATION/ARCHIVING

Shareflex Contract integrates seamlessly with your Microsoft 365 environment. Master and transaction data can be easily and securely reconciled with your ERP, financial accounting or merchandise management systems (SAP, Microsoft Dynamics and others). It makes no difference whether your systems are on-premises or in the cloud.

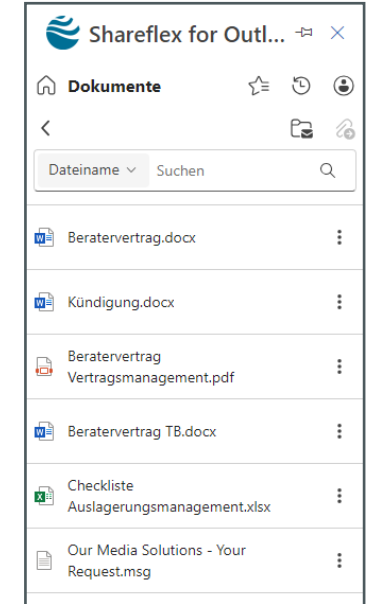
With Microsoft 365, you will also be able to archive your documents in an audit-proof manner as a standard feature. Even storing large volumes of documents is no problem. Archiving is managed through the Compliance & Security Centre. We will be happy to be of assistance with configuration and set-up.

## OUTLOOK INTEGRATION

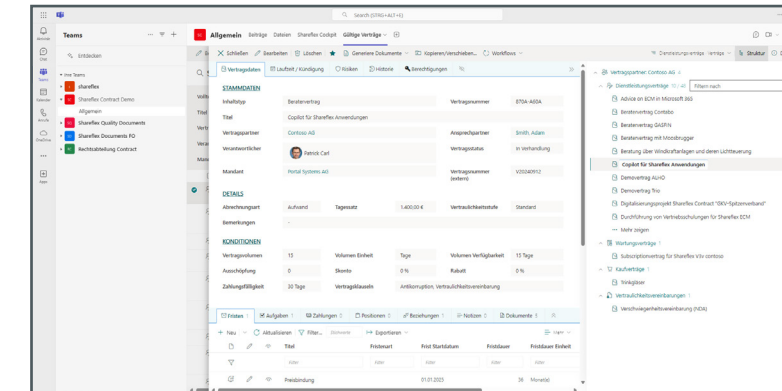
Shareflex Contract integrates seamlessly with Outlook via the user-friendly "Shareflex for Outlook" Sidebar.

Contract files and their contents can be searched and viewed directly in Outlook. Emails and their attachments, as well as documents from the file server, can be assigned to the relevant contract file by simply dragging and dropping them from Outlook.

It is also possible to email contract documents directly from Shareflex Outlook, allowing users to keep up to date. In this way, users of the contract management system always remain in their familiar working environment.



Outlook integration



Teams integration

## INTEGRATION WITH MICROSOFT TEAMS

Integration with Microsoft Teams is very easy because Shareflex Contract is based directly on Microsoft SharePoint. Contract and task lists, contract files and individual documents can be used as an application within a team or in a channel. It is also possible to include documents from Teams in a contract file and provide seamless access to them.

In addition, it is possible to make Shareflex Contract available as a standalone application in Microsoft Teams. This means that contracts and the entire contract management process can be accessed in a quick and easy way directly from within the Teams client.

## AUTOMATIC GENERATION OF CONTRACT DOCUMENTS

Shareflex Contract offers the possibility to automatically create documents from templates via an additional module. The content to be created can be imported directly from contract file metadata, stored text modules or data from third party systems. Interfaces to ERP systems such as SAP or Microsoft Dynamics are provided, as well as the ability to connect to any external database.

In addition, it is possible to scan contract documents and assign them directly to a contract file. Exactly as your business processes demand.

## WORKFLOW

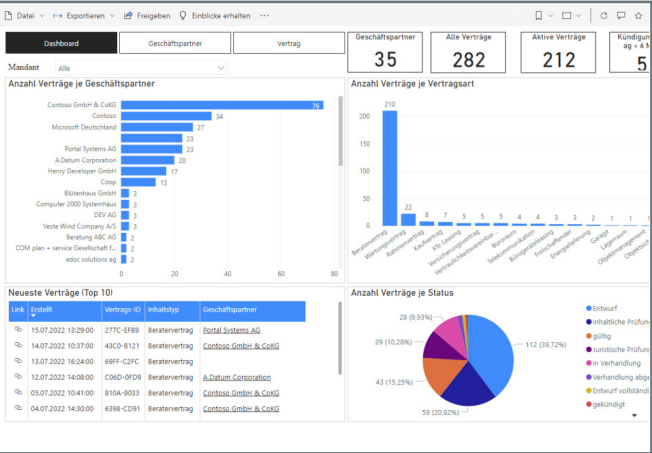
Shareflex Contract allows both ad-hoc and rule-based workflows to be mapped in the standard, for example for technically demanding release and approval processes. These workflows can be adapted to new technical requirements at any time. A graphical workflow designer is also available for this purpose.

The look and feel of the workflow screens is identical to that used to manage contracts. So no further training will be needed to handle the workflow. Of course, workflows created with Shareflex can also be combined with workflows from Microsoft Power Automate.

## EDITING AN AD-HOC WORKFLOW

The screenshot displays the 'Generiere Dokumente' (Generate Documents) workflow screen in the Shareflex Contract Management system. The interface is organized into several sections:

- STAMMDATEN (Basic Data):** This section contains fields for contract details. For example, 'Inhaltstyp' (Content Type) is 'Beratervertrag' (Consulting Contract), 'Vertragsnummer' (Contract Number) is '870A-A60A', and 'Vertragspartner' (Contract Partner) is 'Contoso AG'.
- DETAILS:** This section provides more granular information. For instance, 'Abrechnungsart' (Billing Type) is 'Aufwand' (Expense), 'Tagessatz' (Daily Rate) is '1.400,00 €', and 'Vertraulichkeitsstufe' (Confidentiality Level) is 'Streng geheim' (Strictly confidential).
- KONDITIONEN (Conditions):** This section lists various conditions and their values. For example, 'Vertragsvolumen' (Contract Volume) is '15', 'Volumen Einheit' (Volume Unit) is 'Tage' (Days), and 'Volumen Verfügbarkeit' (Volume Availability) is '15 Tage'.
- Document List:** At the bottom, there is a table listing generated documents. The table has columns for 'Name', 'Inhaltstyp', 'Titel', 'Geändert von' (Changed by), and 'Geändert' (Changed). The list includes documents like 'Beratervertrag.docx', 'Beratervertrag Vertragsmanagement.pdf', and 'Beratervertrag T8.docx'.



Diagrams and charts with Power BI

DIGITAL SIGNATURE

In Shareflex Contract, all of the leading signature solutions, such as DocuSign, Adobe Sign or Microsoft Sign, can be integrated directly into the contract management system. This allows you to automate and simplify all important workflows.

The signed contract document is automatically saved by Shareflex Contract as a new version of the original document, so you always have access to the complete version history.

REPORTING

Shareflex Contract offers extensive possibilities for creating reports and analyses. As all data and documents are stored in SharePoint lists and libraries, they can be converted into user-friendly reports using your favourite reporting tools.

In the standard version, we support classic Excel reporting (pivot & graphical display), Power BI as a paid component of Microsoft 365, as well as the solution from Lightning Tools, a specialist in reporting and analysis.

We are happy to advise on configuration and setup.

AI-BASED CONTRACT MANAGEMENT

With the Shareflex AI Studio, Shareflex Contract offers a powerful platform for the seamless integration of AI processes. This enables complex contract analysis to be carried out efficiently by automatically analysing contract documents and extracting relevant metadata. This greatly simplifies the creation and management of contract files. In addition, AI functionality allows documents to be summarised and translated into different languages.

A key benefit is the ability to manage the AI processes using the Shareflex AI Studio and to customise them using natural language. This ensures intuitive and flexible use without the need for extensive technical knowledge.

	Titel	Feldbezeichner	Aktiv	Eingabeaufforderung	Feldtyp
	Filter	Filter	Filter	Filter	Filter
	01 Titel	Title	✓	Extrahiere den Titel oder Vertragsgegenstand des Vertrags.	Text
	02 Vertragsart	cmContractType	✓	Definieren Sie die Art des Vertrags aus der folgenden Liste: Dienstleistungsverträge, Mietverträge, Leasingverträge, Vertraulichkeitsvereinbarungen, Versicherungsverträge, Wartungsverträge, Kaufverträge, Rahmenverträge.  Wenn es sich um eine Softwaresubscription handelt, soll als Vertragsart Wartungsverträge geliefert werden.	Text
	03 Vertragspartner	cmContractualPartner	✓	Extrahiere Informationen über den Vertragspartner. Extrahiere alle in der Eigenschaft Format definierten Metadaten. Es ist wichtig, sie als JSON zurückzugeben - dieselbe Struktur wie das Format. Beispiel: {Feldname:Wert,Feldname1:Wert,...} Achte darauf, dass der Vertragspartner nicht die Portal Systems AG ist.	Lookup

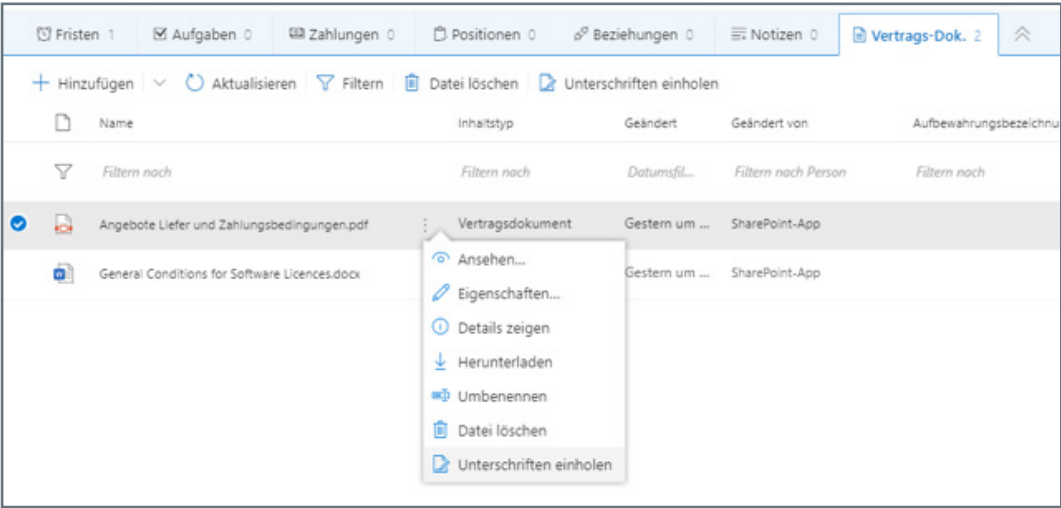
Extraction of metadata using AI

ARTIFICIAL INTELLIGENCE AND M365 COPILOT

Artificial intelligence (AI) is becoming an integral part of our lives, transforming the way we work and process information. With solutions such as Azure OpenAI and the new Microsoft 365 Copilot, Microsoft offers a comprehensive AI infrastructure and applications that integrate directly with Microsoft 365 – including SharePoint Premium, the Power Platform, and other core applications.

To get the most out of these AI capabilities, it's critical that data and documents are stored in a central repository, such as the Microsoft 365 cloud. This way, all information remains under the control of the Microsoft cloud and can be optimally protected by policies.

As Shareflex Contract also stores its data in this central repository, it can be seamlessly used for AI-based information retrieval. This leads to significant added value for companies by increasing employee productivity and efficiency. Examples of use include intelligent searches for contracts, chatting with contract content, comparing contract versions and generating new contract content.





# FEATURE OVERVIEW SHAREFLEX® CONTRACT

## CONTRACT CREATION

- ✓ User-friendly interface
- ✓ Convenient contract capture
- ✓ Scan & Detect
- ✓ Microsoft Office Template Management
- ✓ Automated contract creation from metadata, external databases/ERP systems
- ✓ Optional use of textmodules/boiler plates

## CONTRACT MANAGEMENT

- ✓ Dates & Deadlines
- ✓ Automatic due date calculation
- ✓ Configurable email alerts (individual or bulk emails)
- ✓ Absence management
- ✓ Creation of contractual relationships
- ✓ Flexible metadata and full text search
- ✓ Integrated document management
- ✓ Permissions management
- ✓ Business partner management

## PROCESSES & WORKFLOWS

- ✓ Rule-based and ad-hoc workflows
- ✓ Planned workflows
- ✓ Graphical workflow configuration
- ✓ Contract release and approval processes
- ✓ Automatic update of cancellation dates

## INTEGRATION

- ✓ Contract files in Outlook
- ✓ ERP integration (SAP, Microsoft Dynamics (365), ...)
- ✓ Integration with Microsoft Teams
- ✓ Master data reconciliation
- ✓ Third party integration

## AI FEATURES

- ✓ Automated contract file creation
- ✓ Automatic summarisation of data
- ✓ Automated translation

## REPORTING

- ✓ Lists, groupings, totals
- ✓ Graphical views and charts
- ✓ Excel export
- ✓ Individually configurable

## ARCHIVING

- ✓ Audit-proof archiving

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Book Live Demo



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