SMART by **GEP**®

Unified Procurement Platform

CONTRACTS MANAGEMENT USER MANUAL

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Chapter 1:   Introduction

SMART by GEP Contract Management enables you, as a supplier to review the contract through a single centralized automated repository. Its end-to-end capabilities simplify the process of contract signature, approval, negotiation and management.

The following guide helps you navigate through the application and make effective use of its various features and capabilities.

Chapter 2: Overview

On successful login, the Workspace home page is displayed as shown below:
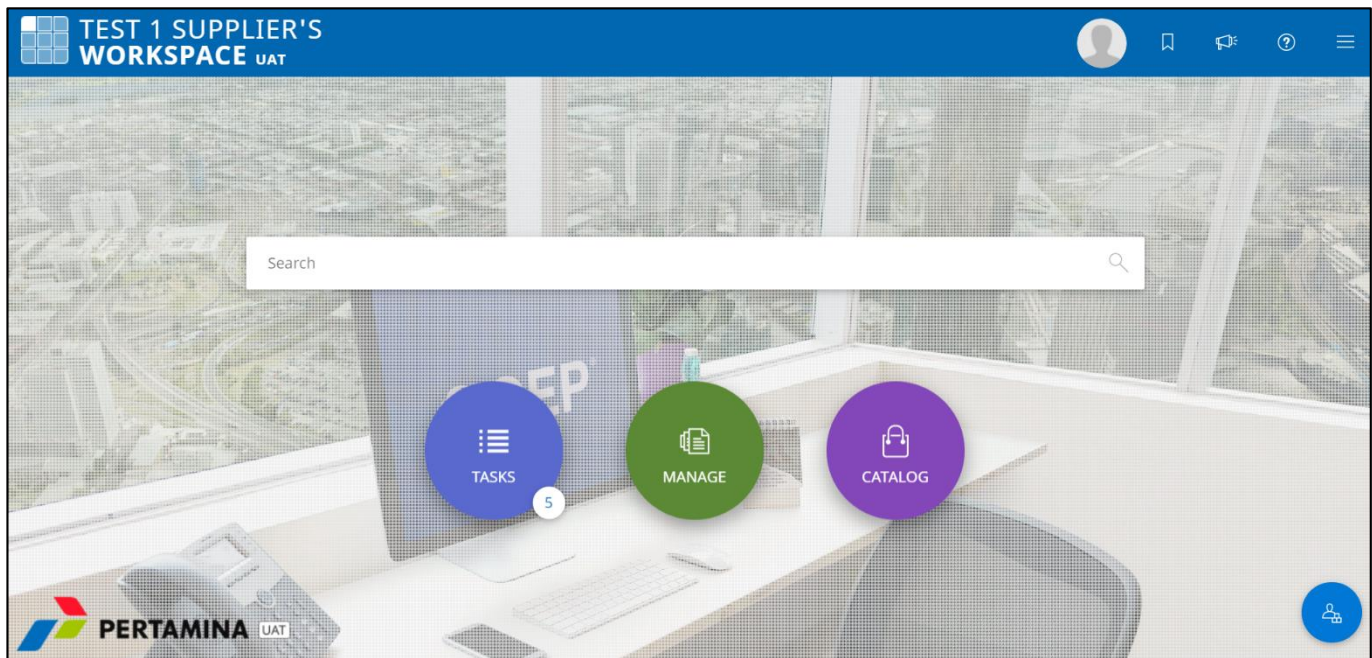
In Workspace, you can view the existing Contracts documents either under the Task section or the Manage section. You can create a new Contract under the Create section.

Under the Task section, the documents are categorized and displayed according to the action that is pending for you. For example, you will view the task that are pending your approval in the Task section under the Follow Up card type. You can search for and work on the required Contracts document.

Under the Manage section, the documents are arranged according to the document types. Scroll through the cards to locate Contracts on the Contracts card, click the required Contract document.

You can also search for a contract document using the search field on the Workspace home page.

> **Note**
>
> *For information on logging into SMART by GEP and navigating the Task and Manage sections of Workspace, see* ***Workspace Overview User Manual****.*

Chapter 3: Working with Contracts

As a supplier, you can view the progress of the contracts. For example, you can view if the contract on the buyer side is sent for buyer signature. You do not have access to see the contracts in Draft and Draft Amendment status. You can Accept, Reject or Sign a contract only when the contract is assigned to you.

3.1   Review a Contract

Once the buyer completes drafting the contract, you will receive the contract for review. When you login to the tool you can view the contract in the Contract card under Manage with status Supplier Review Pending.

Perform the following steps to review a contract:

1) Click the contract name to preview the contract.

2) You can view the contract metadata, notes, line items, comments and notifications but you cannot modify/delete this data. You can add attachments.

3) You can also download the contractual document, modify it and upload a new version for the document.

While you are reviewing the contract, the buyer:

- cannot delete the contract. However, if there are any changes that the buyer has to make in the contract, the buyer can withdraw the contract.

- can withdraw the contract only if,

  - you have not checked out the contract. In case the buyer withdraws the contract, a notification is displayed stating that the contract is withdrawn by the buyer. You cannot view the contract once it is withdrawn.

Note

If you have checked out a contract, and the buyer tries to withdraw the contract, an alert message is displayed to the buyer.

3.2   Accept Contract

Once you review the entire contract you can now accept the contract.

Perform the following steps to accept a contract:

1) From the Workspaces home page, click **Manage**, and under the Contracts card click the contract name.
2) Select **Accept** from the Actions menu. The following Comments pop-up appears:
3) Provide the comments in the comments section and click **Accept**.
4) Once you accept the contract, the buyer will receive the contract, if the changes made by you are accepted by the buyer, the buyer has to click Accept Whole Contract. The status of contract on the buyer side then changes from Supplier Review Pending to Supplier Reviewed.

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Note *Only when the Buyer has accepted your changes the approval process is completed.*

3.3 Reject Contract

You can view the entire contract and if the contract does not meet your requirements, you can reject the contract.

Perform the following steps to reject a contract:

1) From the Workspaces home page, click **Manage**, and under the Contracts card click the contract name.
2) Select **Reject** from the Actions menu. The following Comments pop-up appears:
3) Provide your rejection comments in the Comments pop-up and then click **Reject**. The status of this contract changes from Supplier Review Pending to Supplier Rejected.

3.4 Downloading Contract Document

You can download the contract document and work on it offline.

Edit Contact Body

To edit the document:

1) From the Workspaces home page, click **Manage**, and under the Contracts card click the contract name.

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Standard Services Agreement

Always upload your project agreement and statement of work document to the Elance Private Message Board ("PMB").

This Standard Services Agreement is a sample provided for your information only and may not be relied upon as legal advice. This agreement might not be appropriate for your requirements. Elance makes no warranty about the suitability of this sample agreement and accepts no liability arising out of the use of this agreement. Please consult your legal or business advisor for further information or advice.

STANDARD SERVICES AGREEMENT

THIS AGREEMENT is made on   [Month, day, year]

BETWEEN
1. [the Buyer] of (the "Buyer"); and
2. [the Service Provider] of (the "Service Provider"),

collectively referred to as the "Parties". RECITALS

The Buyer wishes to be provided with the Services (defined below) by the Service Provider and the Service Provider agrees to provide the Services to the Buyer on the terms and conditions of this Agreement.

1. Key Terms
   1.1 Services
   The Service Provider shall provide the following services ("Services") to the Buyer in accordance with the terms and conditions of this Agreement:
   [Insert a description of the Services here]
   1.2 Delivery of the Services
       a. Start date: The Service Provider shall commence the provision of the Services on [insert date here].
       b. Completion date: The Service Provider shall complete/cease to provide (delete as appropriate) the Services by/on (delete as appropriate) [insert date here] ("Completion Date").
       c. Key Dates: The Service Provider agrees to provide the following parts of the Services at the specific dates set out below: [insert dates here]

CANCEL   CHECK OUT

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Click **Check Out**, to edit the document.

Note

To directly upload a new version of the document, click **Upload Minor Version.** Browse to the required document and click **Open**. A new version of the document is uploaded.

Click **Continue Editing**, to edit using online editor.

The left pane repository displays the variables. With your cursor positioned where you want the variable content to appear, select the variable from the left panel to insert it.

Once the variables are inserted, click **Save As Draft** to update the changes. Click **Check In**, to mark the document as the latest updated version.

You can click Upload Minor Version, to upload a minor version. Only the user who has uploaded this version can view it. All the other users will see the major versions only.

Compare Version

To view the different versions of the document, open the contractual document from the Contract Language section and click the **Compare Versions** icon to view the version you want to compare. By default, the latest version is shown. You can change the version by using the drop down.
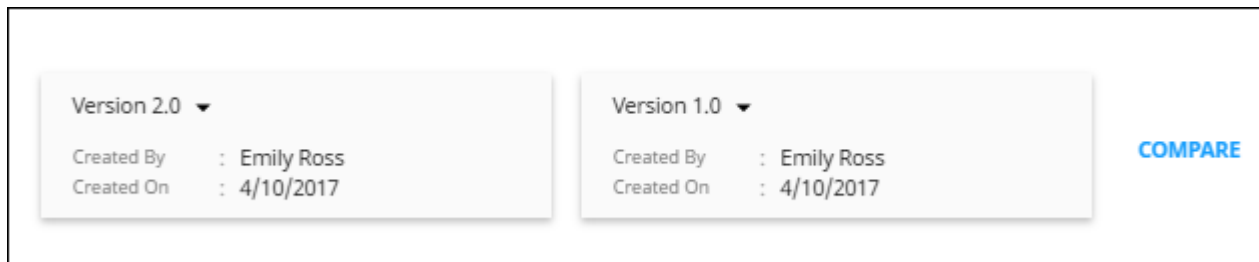
The Compare Versions link opens a new pop-up window, in which you can view the differences in both the documents. The differences are highlighted as per specified color code specified on the page. Any data that has been deleted in the new version will be highlighted in Light Red and any data that has been inserted in the newer version will be highlighted in Yellow.
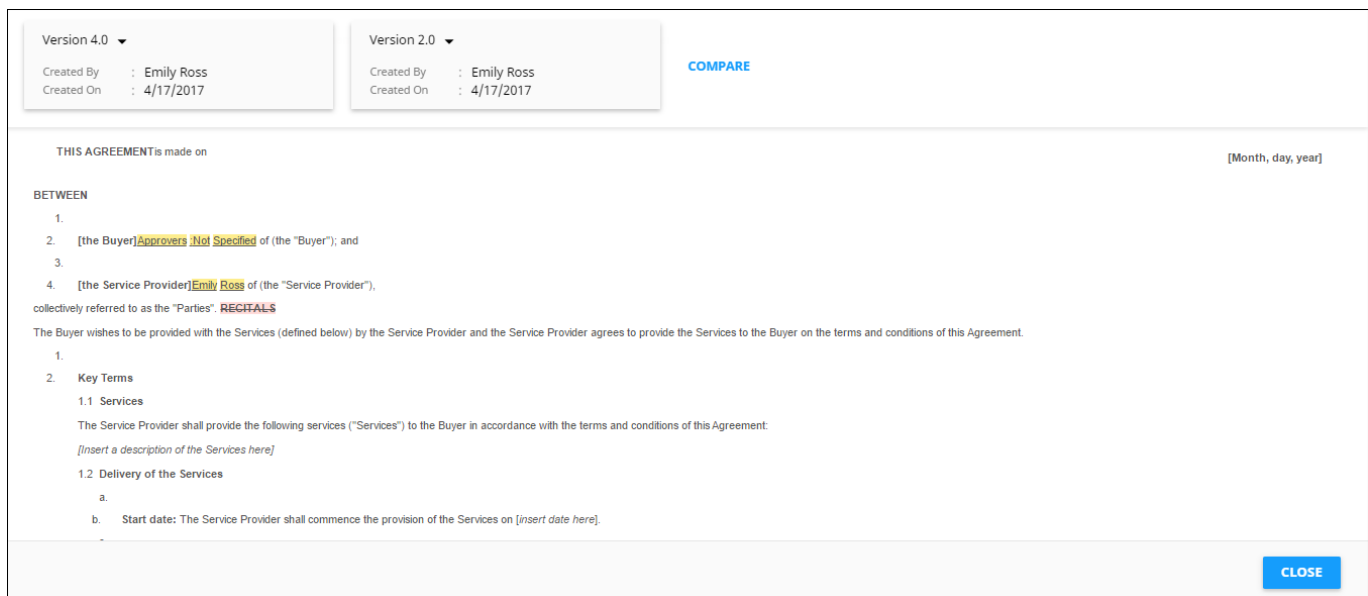
Download Document

You can view or delete uploaded pre-signed contract language documents. Select the document and click the Download Selected [⬇] icon or Delete Selected [🗑] icon.

3.5   Tracking the Status

Using this option, you can track the status of the contract.

To track the status of a contract, on the top-right corner of the contract page, click the **Action** [⋮] icon, and click **Track Status.**

Information on the Track Status pop-up is displayed as follows:

3.5.1 Notes and Attachments

You can upload soft copies of the contract documents and additional documents for the contract. You can also add notes and external links.

Upload all relevant documents either as scanned or as individual attachments, including:

- Internal Process Sign off Forms
- Appendices
- Notes and external links
- Any other documents pertaining to the contract that may be useful
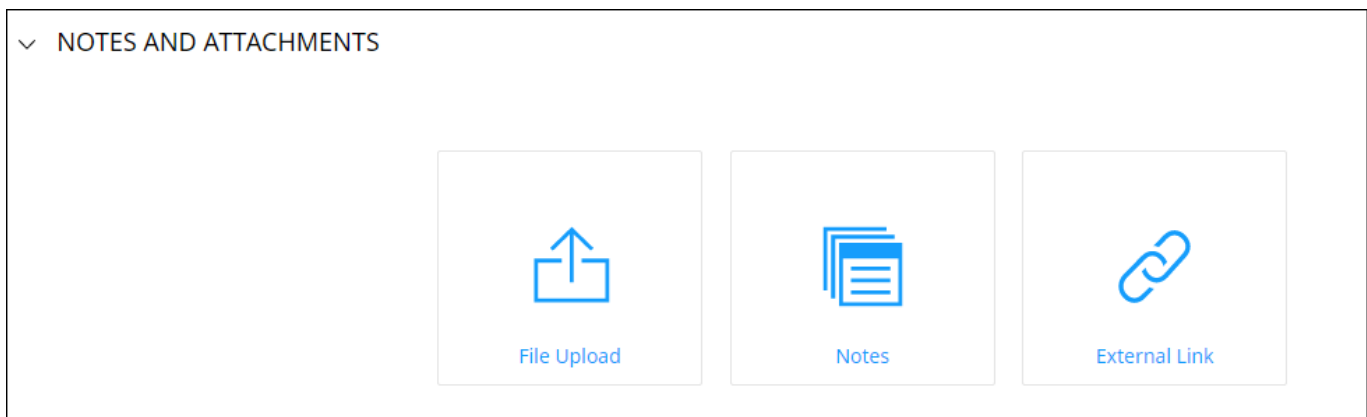
To upload a document:

1) Click **File Upload**, browse to the document, select it and click Open to upload the document.

    OR

    Drag and drop the document.
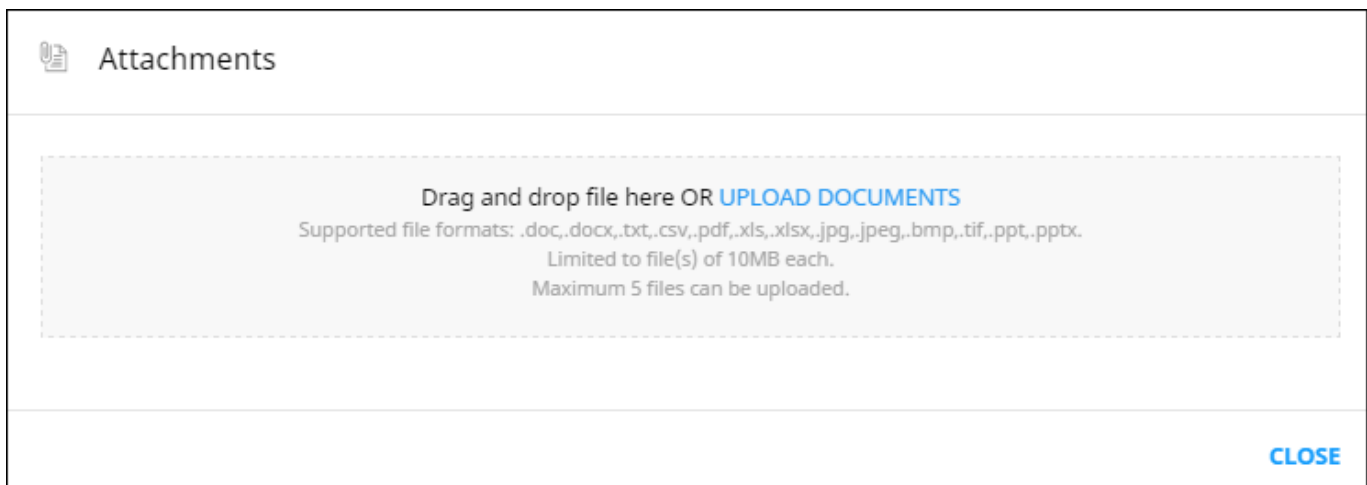
You can even select the required document and click on **Download Selected** icon which will download the selected document. You can also download multiple documents at once. Select multiple documents and click on **Download Selected** icon, all the documents will be collated into a zip file.

Select the document you want to delete and the click the **Delete** icon. After deleting the required document system will ask for confirmation, select **Yes** to delete the selected document or else select **No**.

	Name ↕	Classification	Type	Added	Added By	File Size
☐	Template_Appendix_HSSE (1).docx	Please Select ▼	File	04/29/2020	Test 1 Supplier Pertamina	19.00 KB

∨ NOTES AND ATTACHMENTS

To add Notes, click **Notes**, on the notes pop-up enter the name and description for the notes and click **Save**.

Notes

Name

Please enter name

Description

CANCEL   SAVE

Similarly, to add external link, click **External link,** enter the name and URL for the external link and click **Save**.

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EXTERNAL LINK

Name

Please enter name

URL

CANCEL   SAVE

3.6   Exporting a Contract

You can download the entire contract. For more information refer Downloading Contract Document or can choose to download contract coversheet details, contractual language, attachment or line items in Word or PDF format.

Perform the following steps to export a contract:

1) From the Workspaces home page, click **Manage**, and under the Contracts card click the contract name.
2) Click **Export** from the Actions menu. The following Export pop-up appears:

Export

☑ Contract Details & Additional Info

☐ Contractual Language

☐ Attachment

☐ Line Items

VIEW LOG   CANCEL   EXPORT

3) Select the required document and click **Export**. The success message appears.

   The document will be downloaded in zip format in your **Downloads** folder. Click on the zip file to view the details in the attachment.
4) To view the downloaded document details click **View Log**.

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3.7 Supplier Signature

You are enabled the signature mode that is selected at the buyer side.

Once the Buyer clicks on Send for Supplier Signature, the contract is available to you with status as Supplier Signature Pending. You will receive an email to sign the contract.

Once you open the contract, you'll have to click on sign contract to accept the contract or reject to reject the contract.

Once you click on sign contract, you'll have to then download the contract sign it, and upload it. Once successful upload the contract is signed on the supplier side.

About SMART by GEP

GEP helps global enterprises operate more efficiently and effectively, gain competitive advantage, boost profitability, and maximize business and shareholder value.

Fresh thinking, innovative products, unrivaled domain and subject expertise, and smart, passionate people – this is how GEP creates and delivers unified business solutions of unprecedented scale, power and effectiveness.

With 14 offices and operations centers in Europe, Asia and the Americas, Clark, New Jersey-based GEP helps enterprises worldwide realize their strategic, operational and financial objectives.

Recently named Best Supplier at the EPIC Procurement Excellence Awards, GEP is frequently honored as an innovator and leading provider of source-to-pay procurement software by top industry and technology analysts, such as Forrester, Gartner, Spend Matters, Paystream and Ardent Partners. GEP also earns top honors in consulting and managed services from the industry's leading research firms, professional associations and journals, including Everest Group on its PEAK Matrices of Procurement Services Providers and Supply Chain Services Providers; NelsonHall on its NEAT Matrix of Global Procurement BPO Service Providers; HfS in its Blueprint Report on Procurement-as-a-Service; and ALM Intelligence in its Vanguard Reports on both Procurement Consulting and Supply Chain Consulting.

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