



## Functionality Comparison

	UpsideContract-LITE	UpsideContract	Benefit
<b>High-Level Functionality</b>			
<b>Contract Authoring (Templates)</b>	•	•	<ul style="list-style-type: none"> <li>✓ Standardizes contract language.</li> <li>✓ Allows organizations to build a library of contract templates for specific applications.</li> <li>✓ Supports easy, central governance of legal terms and conditions.</li> </ul>
<b>Contract Meta-Data (Header)</b>	•	•	<ul style="list-style-type: none"> <li>✓ Allows Users to identify and manage contract meta-data, including contracting party, contract manager, start &amp; end dates, monetary value, type of contract, etc.</li> </ul>
<b>Contract Details (Products or Services Purchased or Sold)</b>	•	•	<ul style="list-style-type: none"> <li>✓ Provides the ability to define the products and / or services that are being contracted for.</li> <li>✓ Tracks monetary value, unit of measure, calculation type, stakeholders, locations, and accounting information (i.e. cost centers).</li> </ul>
<b>Attached Documents</b>	•	•	<ul style="list-style-type: none"> <li>✓ Allows Users to link supplementary documents to a contract (as part of the contract body itself or as supporting material).</li> </ul>
<b>Workflow, Business Rules &amp; Approvals Management</b>	•	•	<ul style="list-style-type: none"> <li>✓ Allows for virtually any type of business rule, condition, trigger or action to be fully incorporated into an organization's processes for review, approval, and / or notification of various contract activities.</li> <li>✓ Ensures corporately defined approval processes are adhered to.</li> </ul>
<b>Notifications &amp; Events</b>	•	•	<ul style="list-style-type: none"> <li>✓ Allows for extensive flexibility in issuing an e-mail alert when any milestone, renewal, deliverable, or other item has been triggered or has come due.</li> </ul>

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<b>High-Level Functionality</b>			
<b>Full Security</b>	●	●	<ul style="list-style-type: none"> <li>✓ Access can be assigned based on operating units within the organization to the level of granularity necessary to effectively govern access rights.</li> <li>✓ Allows for a hierarchical assignment of security with the ability to assign rights to specific functionality.</li> </ul>
<b>Standard Reporting</b>	●	●	<ul style="list-style-type: none"> <li>✓ Seven standard reports allows for quick and simple general reporting.</li> </ul>
<b>Amendments &amp; Change Orders</b>	●	●	<ul style="list-style-type: none"> <li>✓ Provides an auditable process to make changes to an executed contract and then route the changes through the corporately defined approval process.</li> <li>✓ Allows for the tracking and updating of the contract value when rates or quantities are altered during the life of the contract.</li> </ul>
<b>Location &amp; Stakeholder Management</b>	○	●	<ul style="list-style-type: none"> <li>✓ Provides the ability to include references in contracts for specific stakeholders, groups, or individuals that have an interest in the contract or are required to receive notifications relating to the contract.</li> <li>✓ Allows Users to define one or many locations that need to be referenced on the items being contracted for.</li> <li>✓ Allows Users to link additional information to the Contract Details.</li> </ul>
<b>Supplier / Customer Management</b>	○	●	<ul style="list-style-type: none"> <li>✓ Allows Users to track information and attributes that are supplier or customer specific. Items tracked include Compliance Items, Performance Metrics, Milestone Events, and a listing of all contracts that the Supplier / Customer has with the organization.</li> </ul>
<b>Contract Request Processing</b>	○	●	<ul style="list-style-type: none"> <li>✓ Allows Users to identify their need for a contract to be initiated, or it can be used as the starting point for sourcing and / or sales requests.</li> </ul>
<b>Performance &amp; Compliance Management</b>	○	●	<ul style="list-style-type: none"> <li>✓ Allows for the tracking of any qualitative or quantitative measures relating to the contract to be tracked and recorded.</li> <li>✓ Establishes compliance items / terms for specific aspects of the contract.</li> </ul>
<b>Risk Management</b>	○	●	<ul style="list-style-type: none"> <li>✓ Provides the ability to manage contract risk with a mechanism to identify, evaluate, track and manage risk events, drivers and impacts.</li> </ul>
<b>User Defined Fields</b>	○	●	<ul style="list-style-type: none"> <li>✓ Provides the ability to dynamically add fields of information onto a contract or Supplier / Customer record to be used for reporting and / or analysis purposes.</li> <li>✓ Allows for different data fields to be captured for different kinds of contracts.</li> </ul>

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<b>High-Level Functionality</b>			
<b>E-Forms</b>	○	●	✓ Allows Users to create an electronic form that is used to collect and store data that is related to a contract or the contract process. The form can then be attached to the appropriate contract.
<b>UpsideForms</b>	○	○	✓ Allows Users to define and configure rich, highly dynamic, custom forms (using Microsoft InfoPath®) to capture very detailed contract and/or RFX related information. ✓ Provides advanced calculation capabilities which streamlines the activities involving pricing, rebates, royalties, bids, deals, etc. during the contract lifecycle. ✓ Forms can exist as separate documents or associated with a contract type to be included in the RFX or contract process. ✓ Forms can be attached to a Project within UpsideContract – allowing for the tracking of important details at the Project level.
<b>Ad-Hoc Reporting</b>	○	●	✓ Provides the User with the ability to create reports on the fly from predefined subject areas (data pools).
<b>Data Cubes (OLAP Reporting)</b>	○	●	✓ Allows Users to drill-down to perform trend analysis, forecasting KPI compliance, actual versus forecast tracking, audit compliance, quality assurance, performance monitoring, and other valuable analysis.
<b>Word I/O (MS Word Document Sharing)</b>	○	●	✓ Allows the User to export the contract document to MS Word, and then e-mail the document directly from the application to a named individual. The User can then modify the contract text which can be imported back into the database.
<b>Attached Document Search</b>	○	●	✓ Allows for keyword searches to be performed in attached documents of virtually any format – extremely useful when there are a number of documents attached to a contract.
<b>Budgeting</b>	○	●	✓ Allows an organization to manage the actual spend / revenue versus the planned or budgeted expectation of the contract.
<b>Financial Processing (Invoice Receipt Tracking)</b>	○	●	✓ Automatic payments can be initiated from a contract if based on a defined payment schedule. ✓ Allows organizations to define a “holdback” amount within a contract and when it is to be released for payment.

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- Standard Functionality (included)
- Optional Functionality (additional fees apply)

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