



UpsideLive Workflow

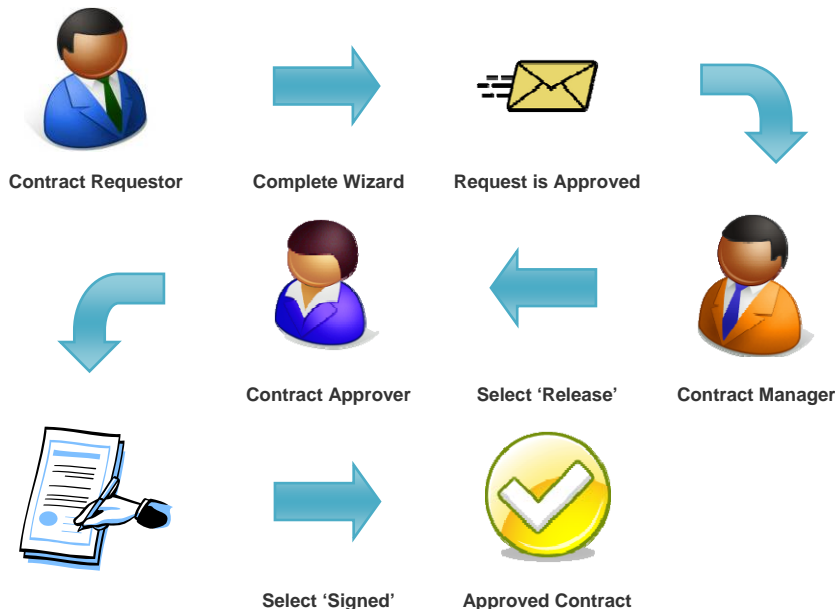
Workflow is the automated path that a contract must follow to move from creation to approval. A contract is moved through the workflow by different levels of approvers. If you choose to use the predefined workflow within UpsideLive, you must assign different users to the approval roles that match the workflow. The predefined workflow includes a Contract Request with one level of Contract Approval.

As detailed in the diagram below, the workflow starts with the contract being created in one of two ways. The first way is if the contract is initiated by a Contract Requestor. When the Contract Requestor has completed the request, the contract will be assigned to a specific Contract Manager (identified as part of the Request). After the Contract Manager has finished working with the contract, the contract must then be approved by the Contract Approver before it can be signed and executed.

The second way to create a contract is to bypass the Contract Requestor and simply have the Contract Manager initiate the contract. The contract then moves to the Contract Approver before it can be signed and executed.

In both cases, as the contract moves through approval levels, an email and a task are sent to the approver who must complete the task. The users that are designated as approvers are defined during setup; users are not responsible for selecting the next approver in the approval chain.

If you choose not to use the workflow, the Contract Manager can create contracts (either using the Contract Request or not), which will automatically be approved upon completion. No approval emails or tasks will be assigned with this option.



Solution Overview

UpsideLive is a comprehensive contract management solution offered as Software as a Service (SaaS). It is ideal for small and medium enterprises (SME) as well as larger companies not wanting to invest in costly IT resources to manage a traditionally installed solution.

Completely web-based, UpsideLive offers 24-7 access to vital documents requiring only an internet connection and a standard web browser. The user-friendly interface allows for quick user adoption.

UpsideLive enables users to manage the complete contract lifecycle effortlessly online. Templates help to standardize contracts and cut down on contract creation time. The central repository provides a secure location to store and organize contracts. Alerts and notifications ensure important deadlines are not forgotten. Reporting and compliance tracking keep users on top of contract progress.

With UpsideLive, users benefit from a low monthly/annual fee, free upgrades and quick deployment. UpsideLive is the solution for companies seeking flexible, yet comprehensive contract management.



UpsideLive User Roles

UpsideLive uses groups of permissions called User Roles to determine which user has access to perform which tasks. Each of the User Roles is associated with different areas of the workflow and/or application administration, and the roles determine which user creates (or requests) contracts, which user approves contracts and which user administers your application.



Contract Requestor

- Request contracts
- View requests created by other users
- View contracts that they requested
- View Supplier / Customer Performance
- Perform searches
- Run reports



Contract Manager

- Request contracts
- Create contracts
- View requests created by other users
- View contracts they requested
- Update Supplier / Customer Performance
- Perform searches
- Run reports
- Reassign own tasks



Contract Approver

- Approve contracts
- View requests created by other users
- View contracts created by other users
- View Supplier / Customer Performance
- Perform searches
- Run reports
- Reassign own tasks



Administrator

- Create and update Users, Customers & Vendors
- Create and modify reports
- Configure Email Events
- Configure Reference Table data
- Create and manage Library Groups
- Create and manager Templates

About Upside Software

Founded in 2000, Upside Software is a profitable, rapidly growing software company. Upside Software is the leading provider of Contract Lifecycle Management (CLM) solutions.

Customers use Upside Software's suite of products to confidently perform Contract Management, Commitment Management, Sourcing & Procurement, and Invoice & Billing management activities.

Upside Software's products address the needs of companies of all sizes. Customers realize significant cost savings while improving customer and supplier relationships. Upside Software's solutions typically provide a full return on investment (ROI) in under a year.

Get started using UpsideLive now with our **Free Trial!**
No risk. No obligation.

UpsideLive

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