Business Solution ELO Contract

Business Solution ELO Contract 1.08

Table of contents

Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO Contract together with ELO Contact.

Basics

The Basics chapter explains the basics of the ELO Contract program interface.

Possible actions

The remaining chapters address possible actions using ELO Contract.

Target audience

This documentation is addressed to Business Solution ELO Contract users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

Basics

ELO Business Solution Contract lets you manage and monitor incoming and outgoing contracts throughout their entire lifecycle.

Fig.: Contract lifecycle

Business Solution ELO Contract replicates the contract lifecycle in a company from creating a contract to contract negotiations, contract conclusion, and termination of a contract.

You can also add documents to the contracts.

A dashboard helps you to visualize contract phases, and reports provide an overview, helping you to plan the next steps.

General note

ELO Contract works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client.

Requirements

Your administrator must have configured ELO Contract for you.

Program interface

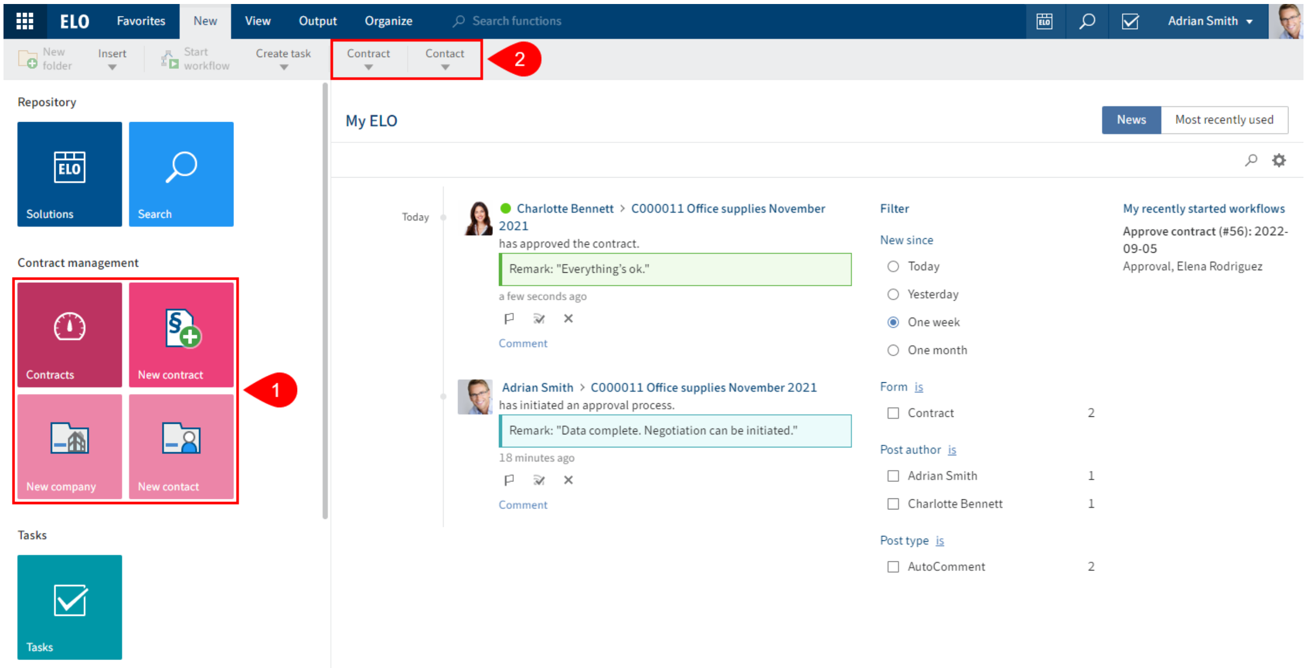


Fig.: Business Solution ELO Contract program interface

You will find ELO Contract functions in the following areas:

1 'Contracts' and 'New contract' tiles in the tile navigation area

You can access the contract monitoring dashboard by clicking the *Contracts* tile.

The *New contact* and *New company* tiles are used for contact management.

2 'Contract' group on the 'New' tab

The *Contact* tab is where you manage contacts.

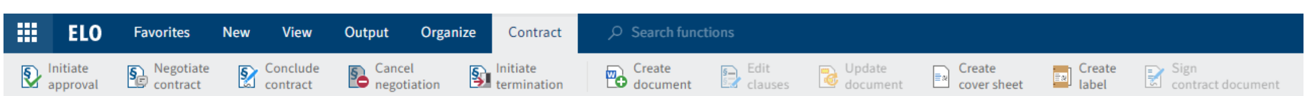


Fig.: 'Contract' tab

3 'Contract' tab

When you select an existing contract, the *Contract* tab opens.

You can access most contract management functions on this tab.

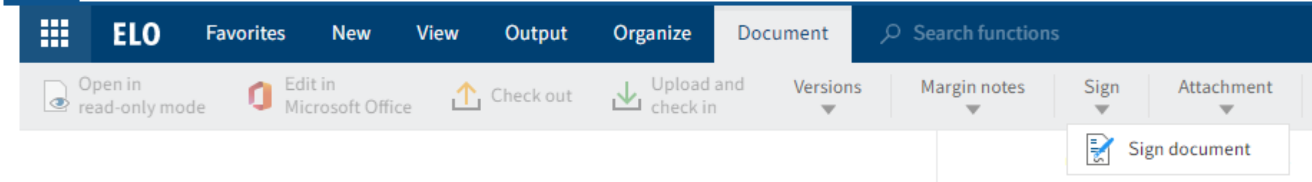


Fig.: 'Document' tab

Sign

When you select a document, the *Document* tab appears. You can request signatures for PDF documents using the Sign group.

> **Information**
>
> This is not a feature of ELO Contract and can also be used for PDF documents not related to contracts. The *Sign contract document* function on the *Contract* tab is specifically for contracts.

Repository

The structure and appearance of the repository depend greatly on your specific configuration. The default state is described here.

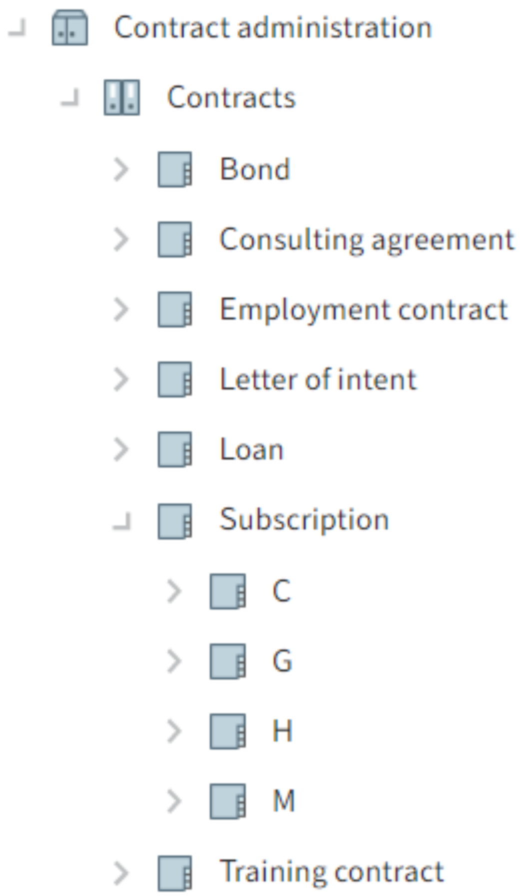


Fig.: Contract management in the repository

Contracts are filed to *// Contract management // Contracts // [Contract type]*.

You will also find references to contracts in dynamic folders. You can use these folders to search for specific contracts, such as by status.

Contract types

All contracts must be based on a contract type. Depending on the contract type, information is automatically entered when filing a contract.

If you don't have to select the contract type when creating a contract, this means that only one contract type has been configured, which is then selected automatically.

Contracts

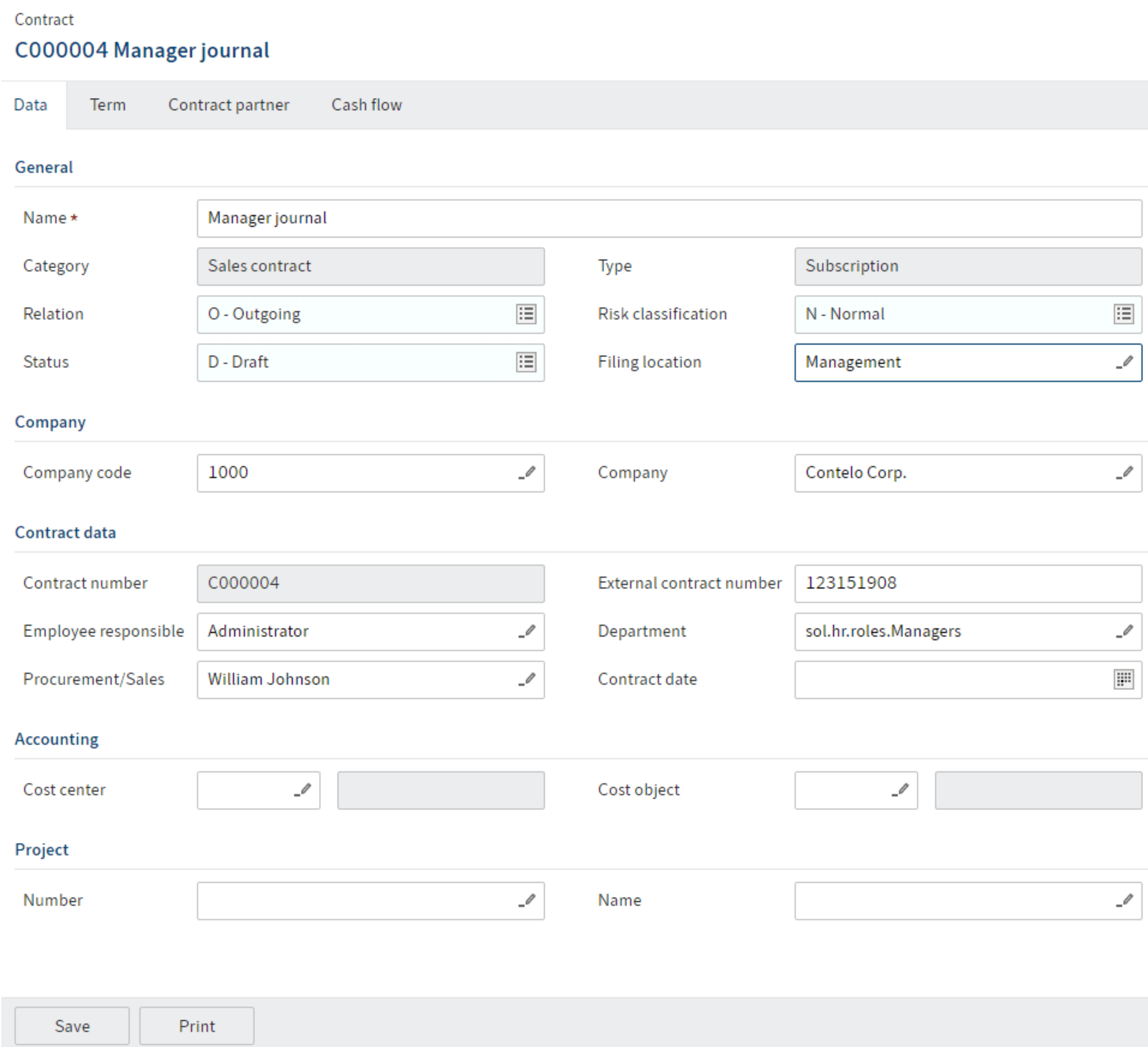


Fig.: Contract file form

Each contract file that is created contains a form.

This form contains the relevant information from the contract as well as its current status.

During the contract lifecycle, the form is edited or supplemented with information by the users involved in the process. The status changes automatically.

A contract can have the following statuses:

- D – Draft
- I – Approval initiated
- A – Approved
- N – In negotiation
-

S – Concluded
- T – Terminated
- C – Canceled

Contracts can be created without a term, with a limited term, and with an unlimited term.

Create contract

Information

You can create new contracts or existing ones in ELO.

When creating a contract, you can enter new contact data in the contact list as needed.

Method

1. On the *New* tab, click *New contract*.

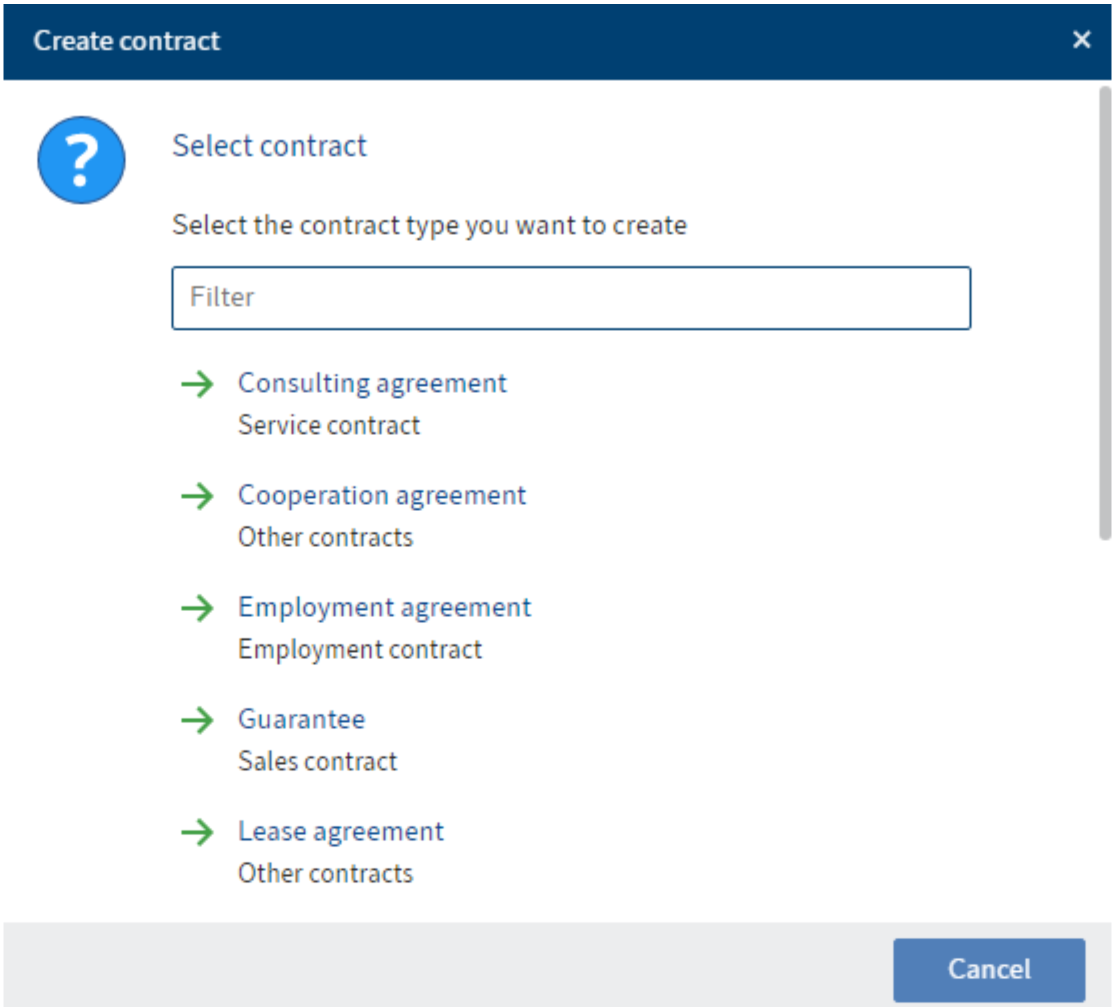


Fig.: 'Select contract' dialog box

Optional: If multiple contract types have been created, you first have to choose a contract type. By selecting a contract type, relevant information is automatically entered in the contract file.

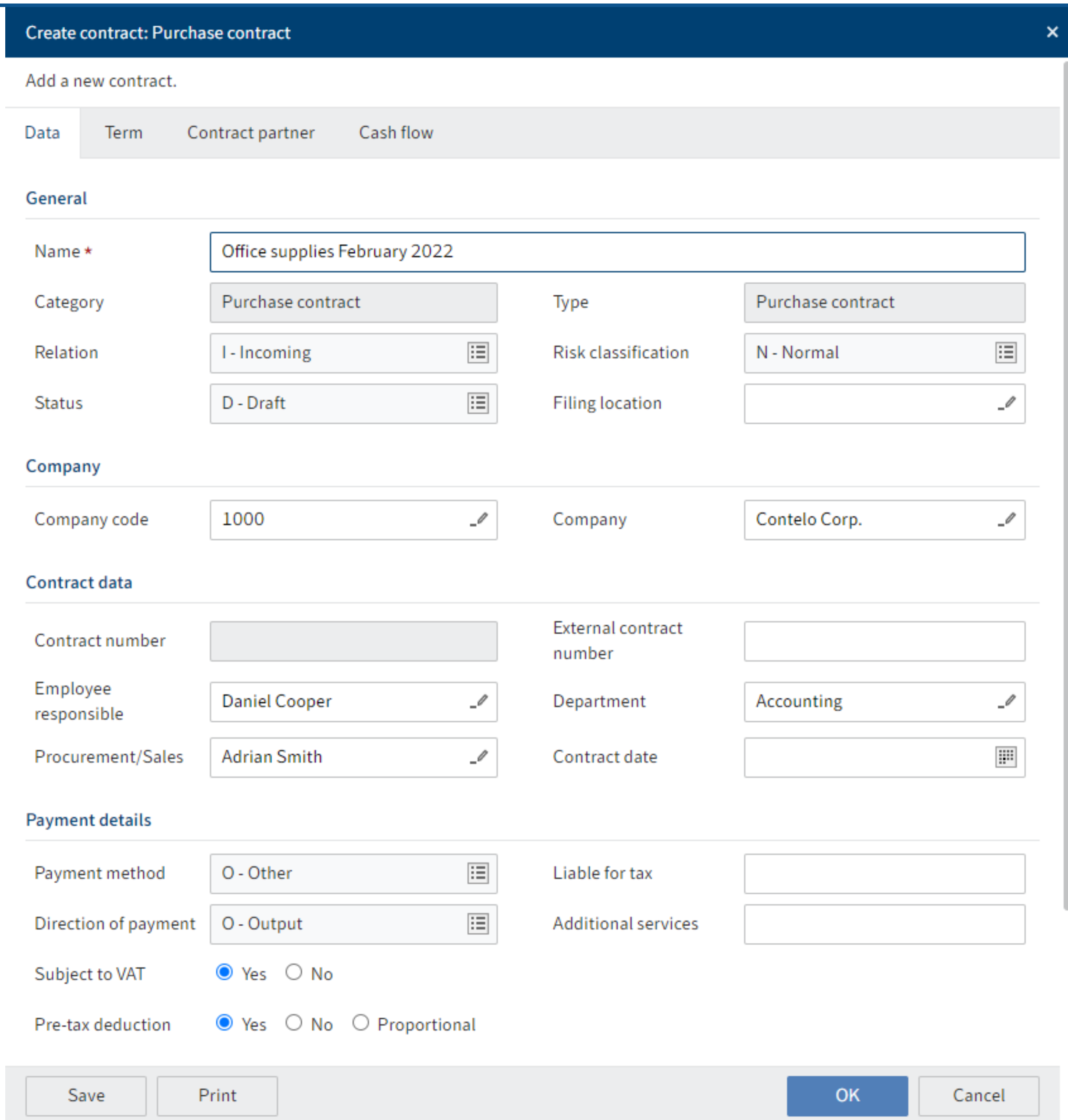


Fig.: 'Create contract' dialog box

2. Complete the fields in the *Create contract* dialog box as required.

You will find the input fields to create a contract on four tabs.

Depending on the contract type, master data may already be filled out. You will recognize such data by the gray background. You can change the entries in the *Relation*, *Risk classification*, and *Status* fields using the drop-down menus.

Mandatory fields are marked with a red asterisk. Combined mandatory fields are marked with a blue asterisk. One of the two fields must be completed.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Contract number: The contract number is generated automatically as soon as you have created the contract.

Create contact: If this is a new contact you want to create, enable the *Create new contacts* option on the *Contract partner* tab.

Result

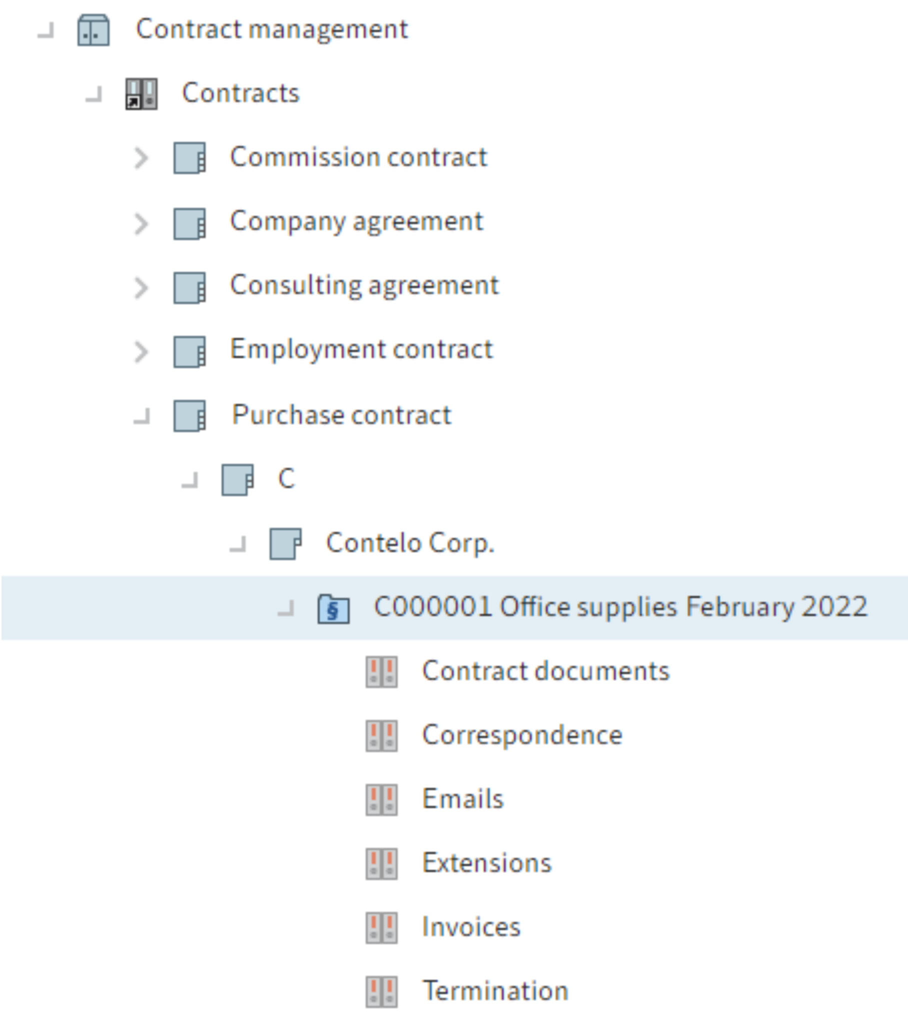


Fig.: New contract in the repository

A new contract is created with child folders.

Outlook

- You can file record objects related to the contract in the corresponding child folders.

Please note

When filing documents related to a contract, make sure to use the *Contract document* metadata form. This is the only way to inherit information relevant for searches.

- Depending on the status of the contract, you can perform actions described in the Contract processes chapter.
- Using the functions described in the Create contract documents chapter, you can automatically create documents with information from the contract.
- If you have added a new contact, the new contact data will be available in a keyword list when creating new contracts.

Contract processes

After creating a contract in ELO, you can map the following processes in ELO:

- Initiate approval
- Negotiate contract
- Conclude contract
- Cancel negotiation
- Initiate termination

These individual processes do not have to be performed as an overall process, meaning that less complex contracts can be completed without any steps.

Initiate approval

Information

You can initiate the approval process for a contract. Approval can be initiated during any phase. During approval, all involved parties can make changes to the contract.

Method

1. Select the contract you want to initiate the approval process for.
2. On the *Contract* tab, click *Initiate approval*.

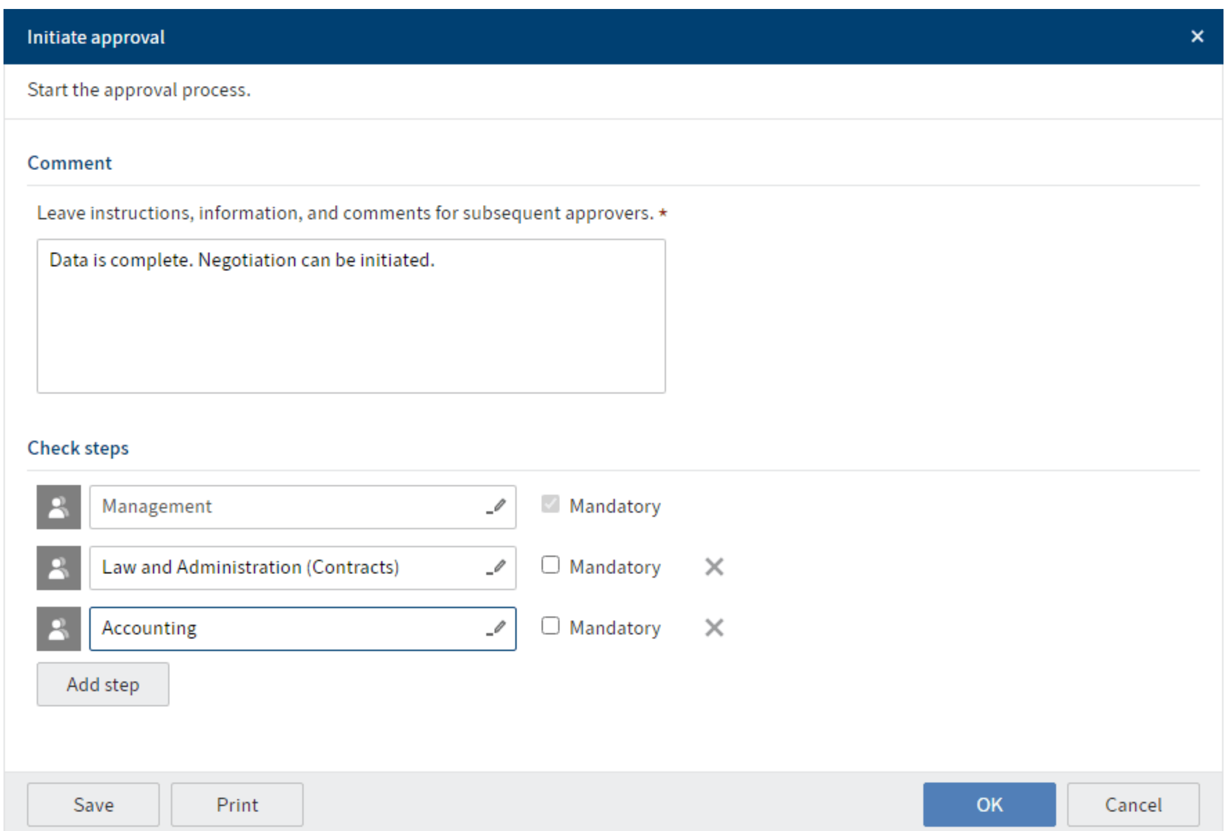


Fig.: 'Initiate approval' dialog box

3. In the *Initiate approval* dialog box, complete the fields as required.

Check steps: Enter the check steps. To prevent users from being able to skip a check step, check the box next to *Mandatory*. As a result, the subsequent check steps cannot be ignored.

Result

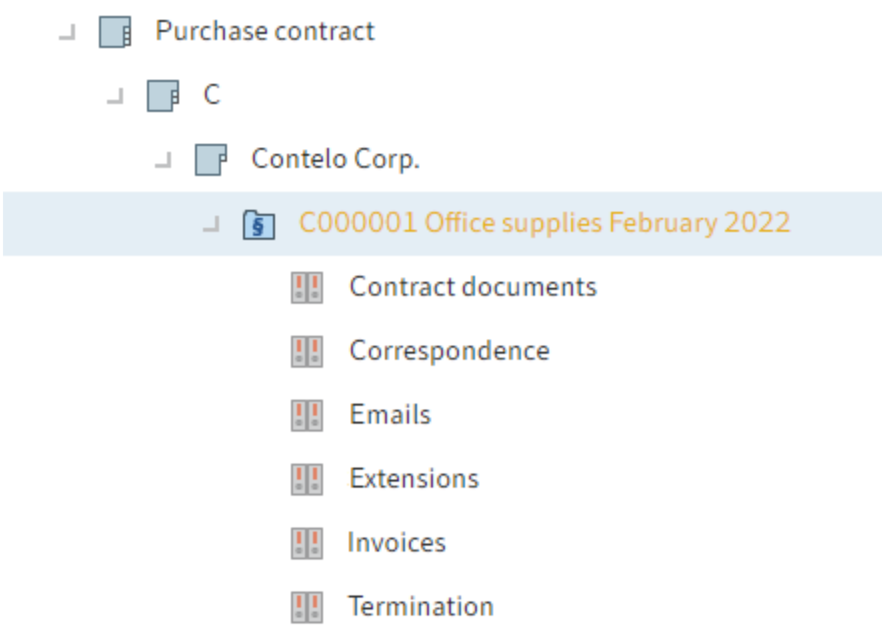


Fig.: Contract file in the repository

An approval workflow is started and is sent to the specified approver(s).

When the approval workflow is still pending, the contract has the status *I – Approval initiated*. After the approval workflow is completed, the contract has the status *A – Approved*. The contract file is shown in a yellow font.

Issue approval

Information

If you have received a contract for approval, it will appear in your *Tasks* work area.

Method

1. In the *Tasks* work area, select the workflow with the contract you are supposed to approve.

2. Click *Accept workflow* to process the form.

3. Check the contract you are supposed to approve and enter a comment in the input field for the next editors.

   Optional: Enter an additional check step as needed.

4.

Click *Approve*.

Result

The workflow is forwarded to the next check step/the responsible department.

Negotiate contract

Information

You can initiate negotiations for a contract.

Method

1. Select the contract you want to initiate the negotiation process for.
2. On the *Contract* tab, click *Negotiate contract*.

Result

The status of the contract changes to *N – In negotiation*.

An automatic feed post is created.

Conclude contract

Information

You can conclude a contract. To search for active and inactive contracts, valid contracts have to be marked as concluded.

Method

1. Select the contract you want to conclude.
2. On the *Contract* tab, click *Conclude contract*.

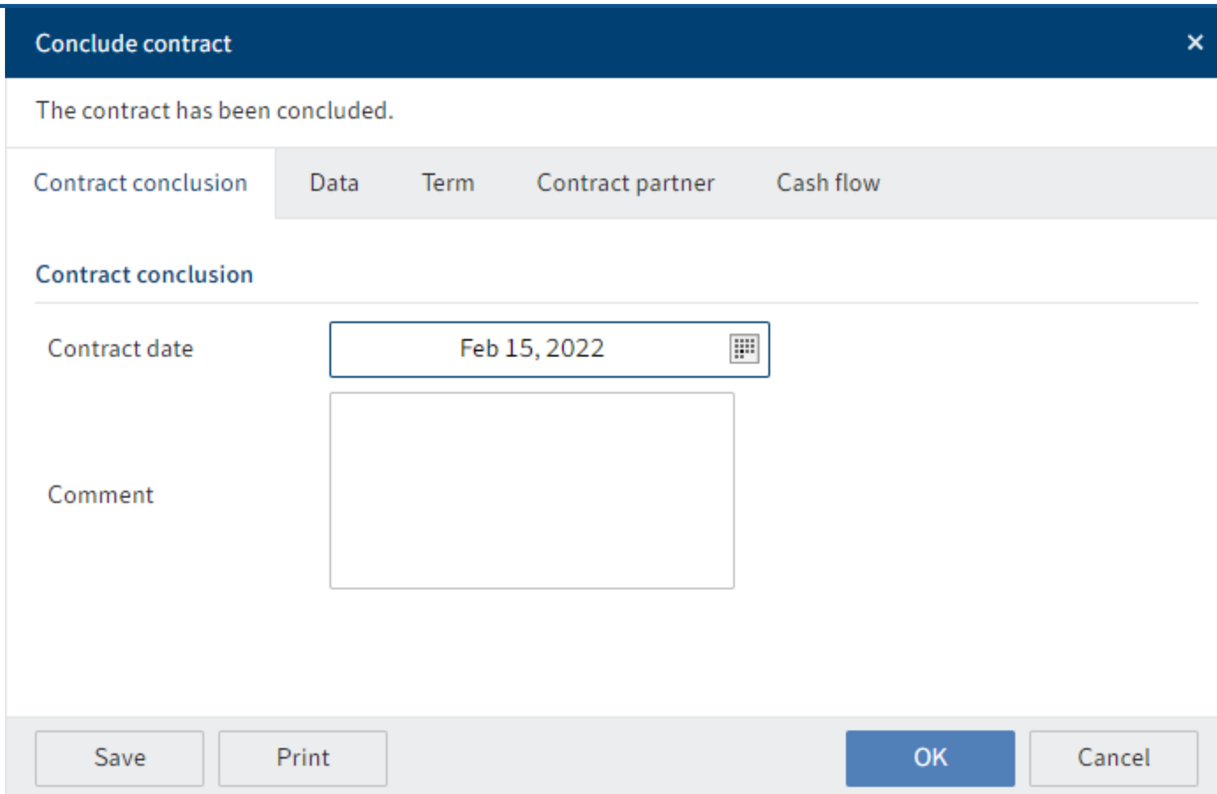


Fig.: 'Conclude contract' dialog box

3. In the *Conclude contract* dialog box, complete the fields on the *Contract conclusion* tab as required.

The fields on the *Data*, *Term*, *Contract partner*, and *Cash flow* tabs are already completed.

Result

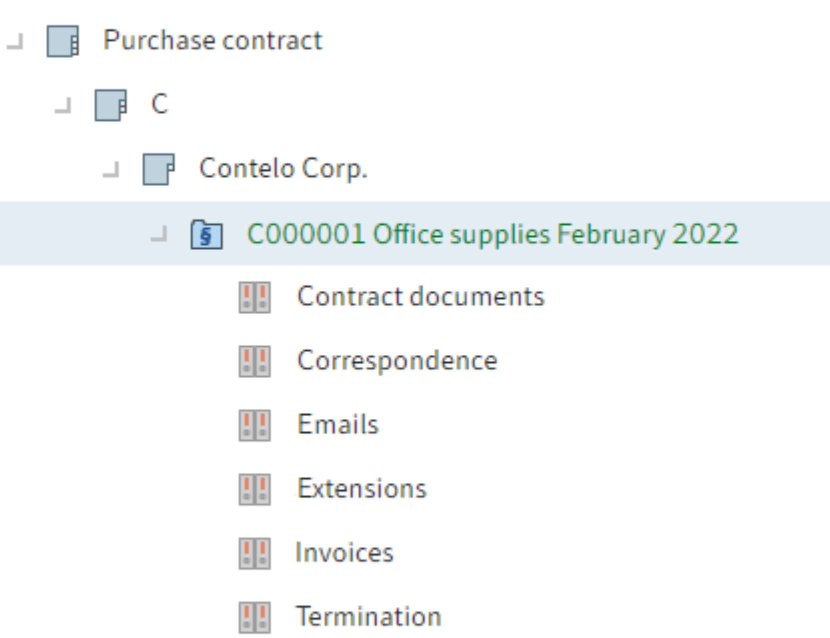


Fig.: Contract file in the repository

The status of the contract changes to *S – Concluded*. The contract file is shown in a green font.

Cancel negotiation

Information

You can cancel negotiations for a contract.

Method

1. Select the contract you want to cancel the negotiation process for.
2. On the *Contract* tab, click *Cancel negotiation*.

Result

The status of the contract changes to *C – Canceled*.

An automatic feed post is created.

Initiate termination

Information

You can terminate a contract. Once a contract is completed, it has to be terminated to signalize the end of the contract in ELO. Before concluding the contract, use the Cancel negotiation function.

Method

1. Select the contract you want to terminate.
2. On the *Contract* tab, click *Initiate termination*.

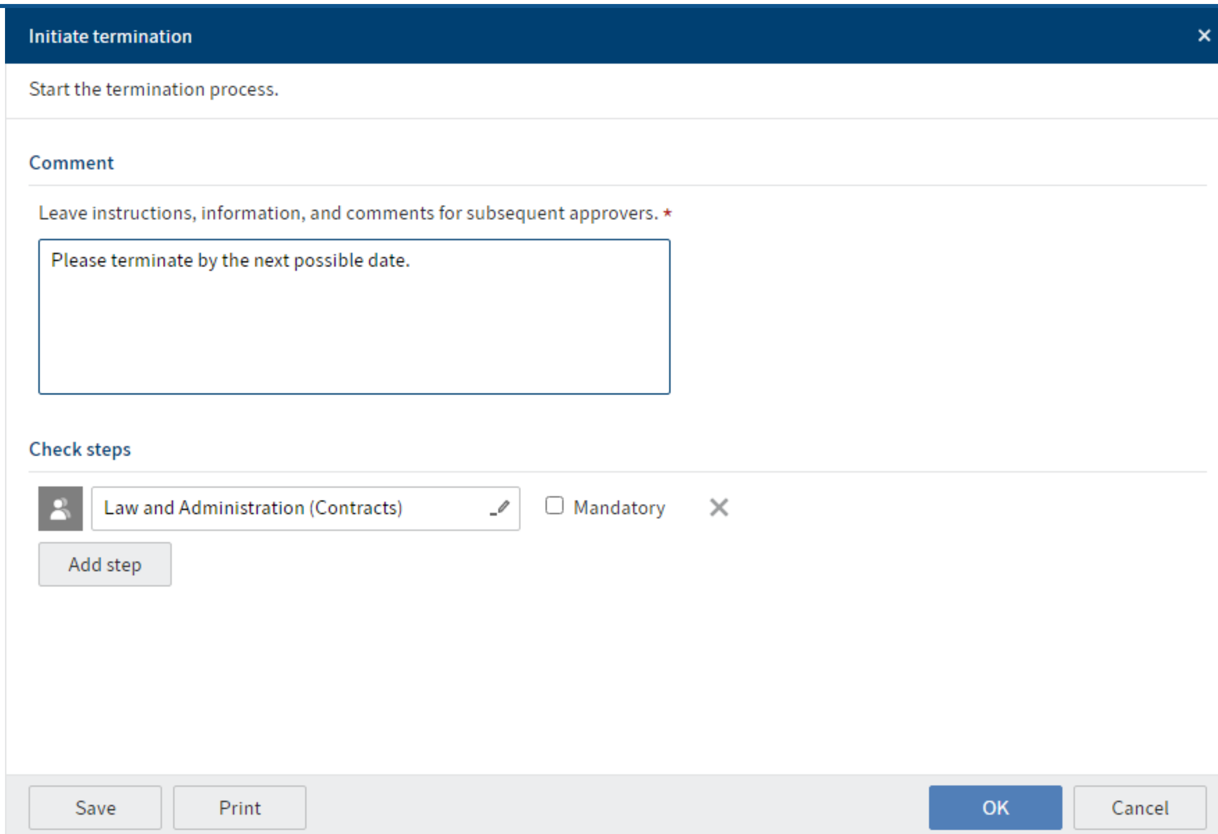


Fig.: 'Initiate termination' dialog box

3. In the *Initiate termination* dialog box, complete the fields as required.

Check steps: Enter the check steps. To prevent users from being able to skip a check step, check the box next to *Mandatory*. As a result, the subsequent check steps cannot be ignored.

Result

A termination workflow is started and is sent to the specified approver.

Outlook

During the termination process, the contract maintains its existing status. Once the contract is terminated, the contract status changes to *T – Terminated*.

Terminate contract

Information

If you have received a contract for termination, it will appear in your *Tasks* work area.

Method

1. In the *Tasks* work area, select the workflow with the contract you are supposed to terminate.

   Optional: Click *Accept workflow* to process the form.

2.

Check the contract you are supposed to terminate and enter a comment in the input field.

Optional: Enter an additional check step as needed.

3. Click *Accept*.

Result

The status of the contract changes to *T – Terminated*.

A feed post is created with the comment you entered.

Create contract documents

You can automatically create documents related to contracts.

This chapter addresses the following functions:

- Create contract clause
- Create document
- Edit clauses
- Update document
- Create cover sheet
- Create label

Create contract clause

Information

You can create contract clauses. Contract clauses are texts that you can use when creating contract documents.

Method

1. On the *New* tab, click *Contract > New contract clause*.

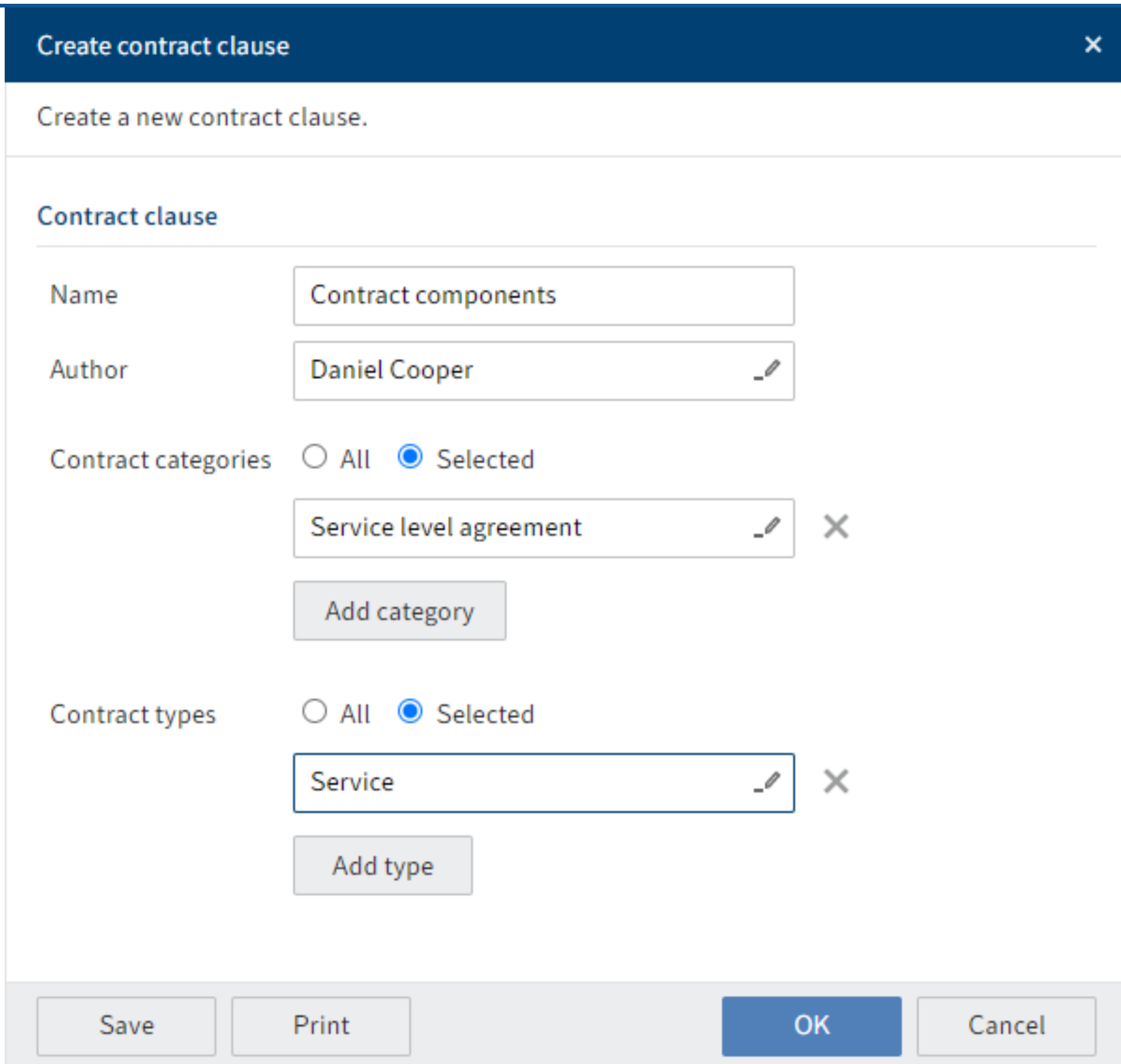


Fig.: 'Create contract clause' dialog box

2. Enter a name in the *Create contract clause* dialog box.

3. Select the contract categories and types that the clause can be used in.

4. Click *OK*.

   Optional: Depending on the setting, you will need to select the application to open the Word file that will be created during this action.

   A Word template with the *clause* placeholder opens.

> **Please note**
>
> In the ELO Java Client, you can edit this Word document, save it, and check it in. This feature is currently not supported in the ELO Web Client.

5.

Close the Word document without editing it.

6. Select the document in the repository and click *Check out* on the *Document* tab.

7. Enter your clause in the Word file.

8. Save and close the document.

9. Check the document back in.

Result

The clause is created in the *Contract clauses* folder.

Outlook

- You can apply the clause using the Create document function for contract documents.
- You can edit clauses by selecting the clause in the repository and checking it out using the function *Document > Check out*.
- If you change a clause, you need to update the documents it was used in with the function *Contract > Update document*.

Create document

Information

You can automatically create a document with the data from a contract. Use document templates for this. Document templates contain placeholders that are automatically replaced with the information from the contract.

You can also insert clauses into a document.

Requirement

At least one document template must be available.

Method

1. Select the folder for the contract you want to generate a document for.

2. On the *Contract* tab, click *Create document*.

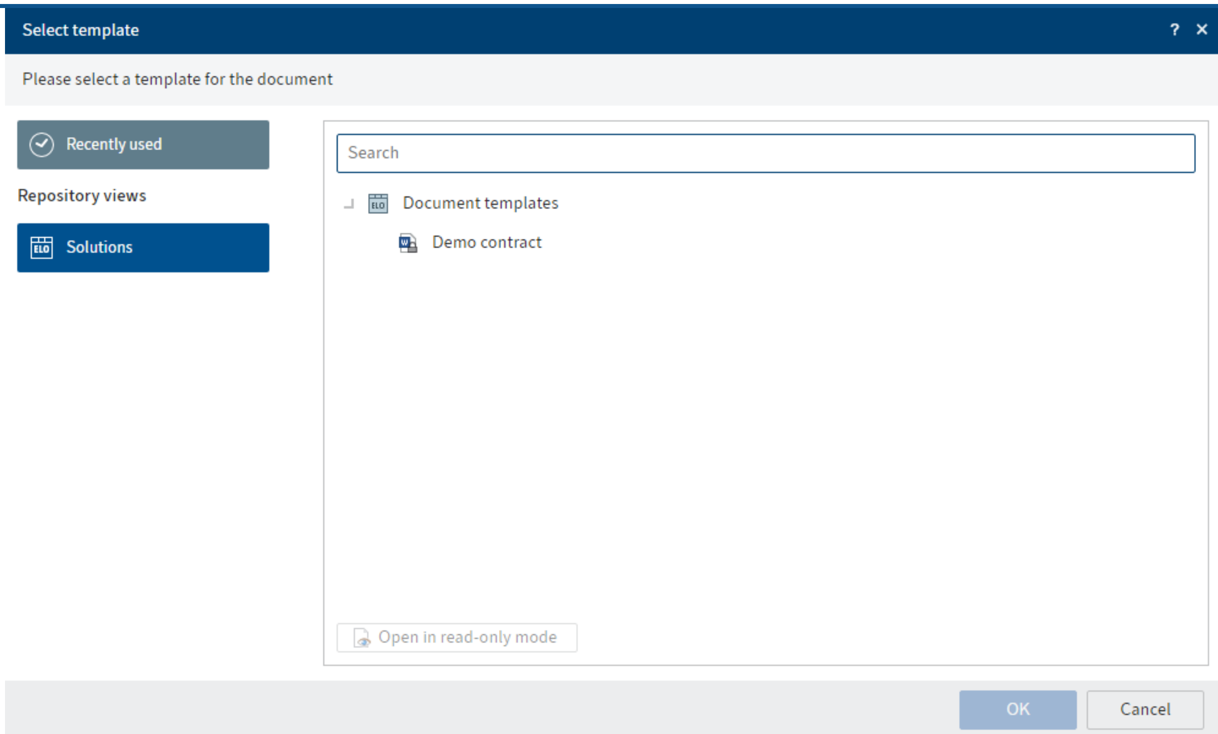


Fig.: 'Select template' dialog box

3. In the *Select template* dialog box, select a document template and confirm your selection with *OK*.

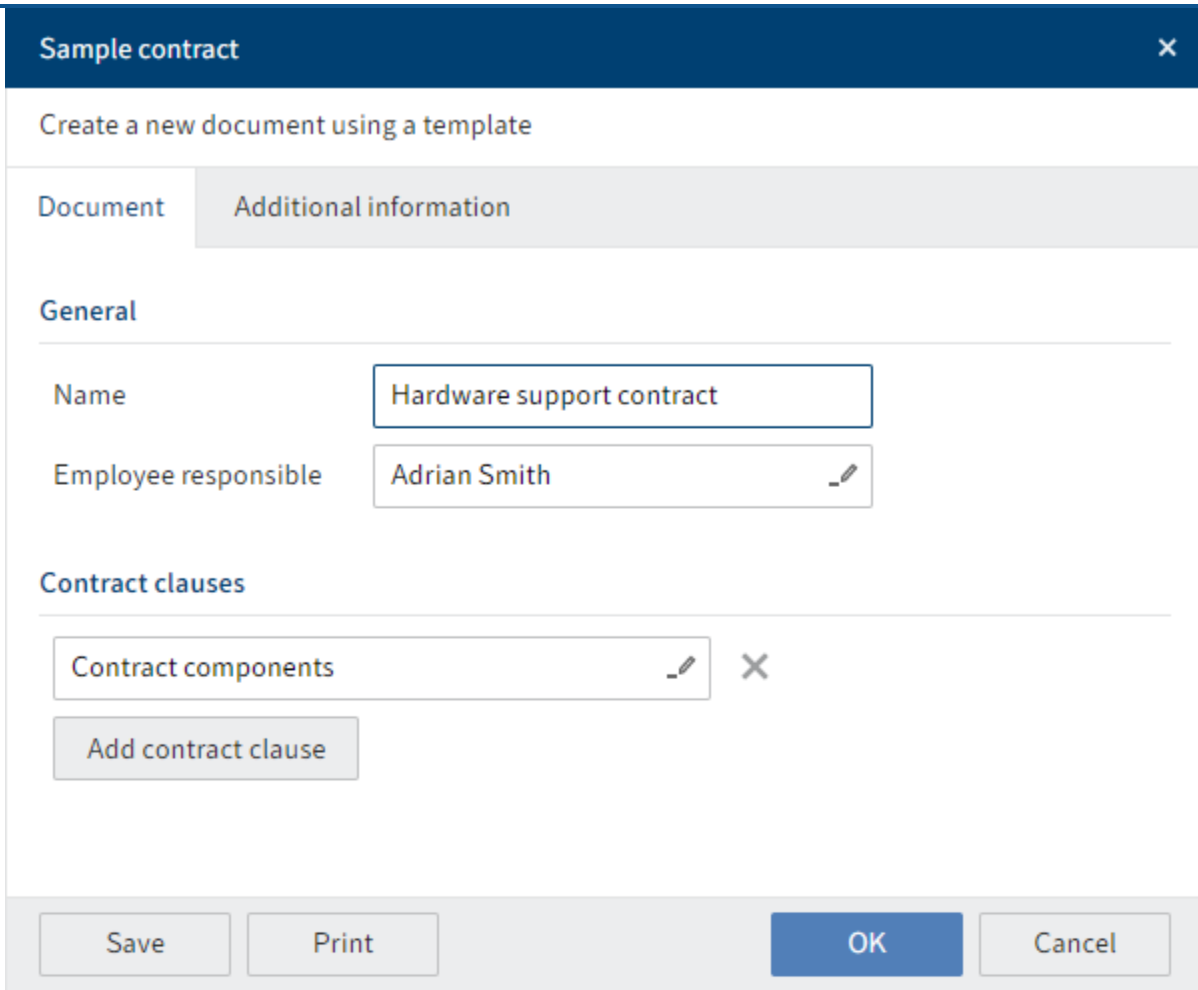


Fig.: 'Create new document' dialog box

4. In the *Create new document* dialog box, you can change the name of the document and the responsible user.

5. If you want to insert a contract clause into the document, select it here. It will be attached at the end of the document.

   The fields on the *Additional information* tab contain the contract information and cannot be changed.

6. Click *OK*.

Result

The document is added to the selected folder and opened.

Please note

In the ELO Java Client, you can edit this Word document, save it, and check it in. This feature is currently not supported in the ELO Web Client. If you want to edit the document in the ELO Web Client, you have to close the document and check it out for editing with the *Document > Check out* function.

Outlook

- You can edit the document and print it for use.
- If any contract information changes, you can apply changes using the Update document function. The *Update document* function has no effect on subsequent changes to the document. It only updates the information and/or clauses automatically transferred from the form.
- You can subsequently edit the clauses, i.e. add more or remove existing ones.

Edit clauses

Information

If you created a contract document using the Create document function, you can later add clauses to it or remove clauses again.

> **Please note**
>
> Always use this function to remove clauses. If you delete clauses from the document manually, the information will not be transferred to the metadata.

Method

1. Select the document you want to edit.

2. On the *Contract* tab, click *Edit clauses*.

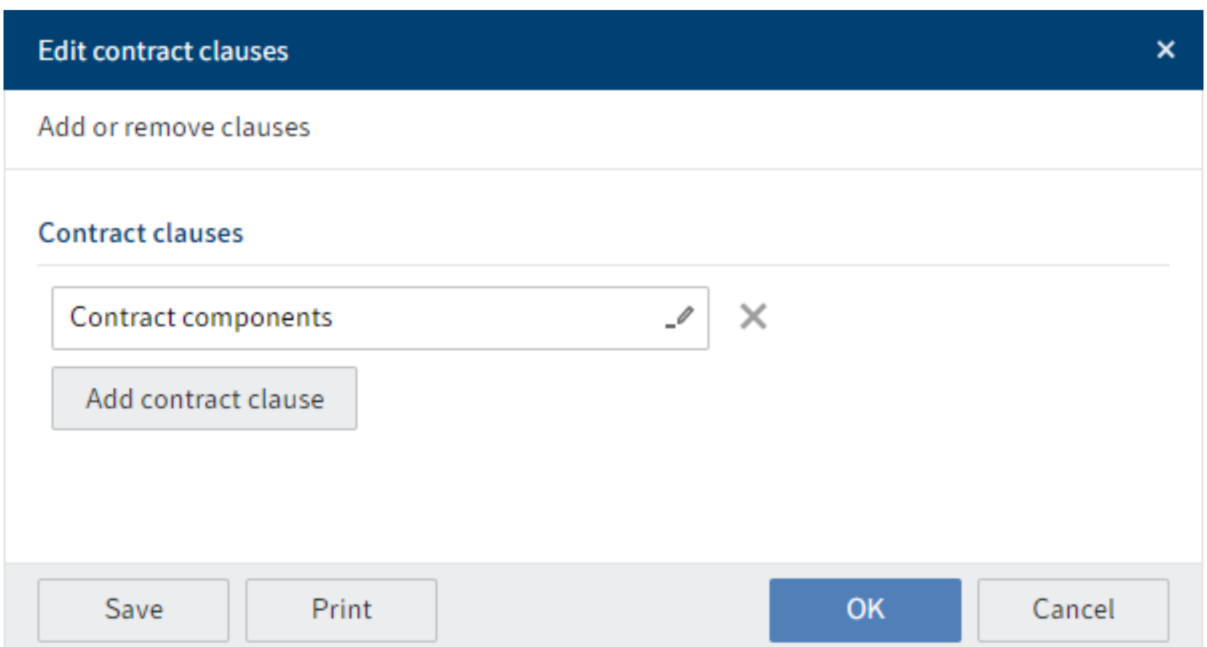


Fig.: 'Edit contract clauses' dialog box

3. In the *Edit contract clauses* dialog box, select or delete the contract clauses that you want to remove from the document.

4. Click *OK*.

Result

The document is updated and opened. You will find the clause at the end of the document.

Please note

In the ELO Java Client, you can edit this Word document, save it, and check it in. This feature is currently not supported in the ELO Web Client. If you want to edit the document in the ELO Web Client, you have to close the document and check it out for editing with the *Document > Check out* function.

Update document

Information

For example, if contract data changes after a document has been generated using the Create document function, you can update the document. As a result, you do not have to create a new document or make manual changes to an existing one.

The document also has to be updated if an existing clause in the document has been changed.

The *Update document* function has no effect on subsequent changes to the document. It only updates the information and/or clauses automatically transferred from the form.

Method

1. Select the document you want to update.

2. On the *Contract* tab, click *Update document*.

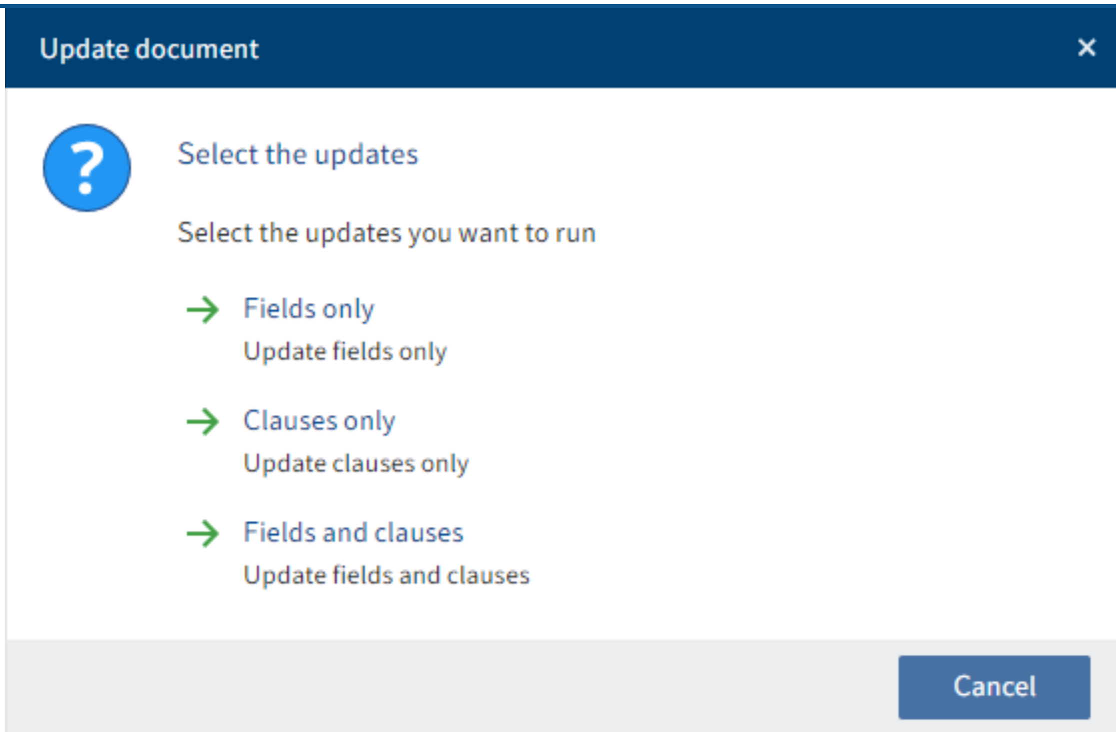


Fig.: 'Update document' dialog box

3. In the *Update document* dialog box, select the parts of the document that need to be updated.

Result

The old information will be overwritten according to your selection.

Create cover sheet

Information

Use this function to create a cover sheet for the selected contract.

Method

1. Select the contract you want to create a cover sheet for.
2. On the *Contract* tab, click *Create cover sheet*.

Result

Contract

C000010

Manager Magazine

Contract partner	Contelo Publishing Fisher, David
Employee responsible	Emily Thomson
Contract type	Subscription
Contract conclusion	12.11.2021
Relation	I - Incoming

Fig.: Cover sheet

The cover sheet is saved to the file.

Outlook

The cover sheet contains information on the contract as well as a QR code. If you print the cover sheet and store it in a physical file, you can scan the QR code with a mobile device to go straight to the digital file.

Create label

Information

Use this function to create a label for the selected contract file.

Method

1. Select the contract you want to create a label for.
2. On the *Contract* tab, click *Create label*.

Result

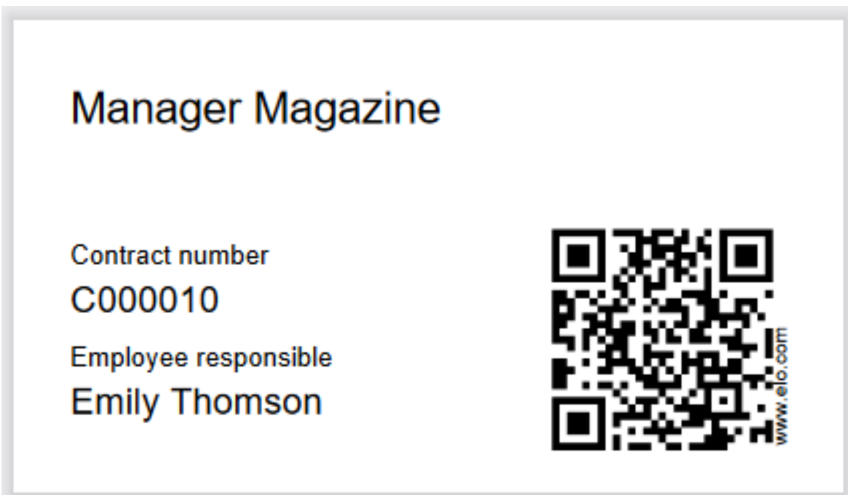


Fig.: Label with QR code

The label is filed to the contract file.

Outlook

- The label contains information on the contract as well as a QR code. If you print the label using a label printer and store it in a physical file, you can scan the QR code with a mobile device to go straight to the digital file.
- If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.
- You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.

DocuSign

You can send PDF documents for signing. The documents have the following statuses in the repository until they are signed:

Status	Meaning
[sent]	The document was sent and cannot be edited.
[received]	The document was received but hasn't been signed yet. It is still locked for editing.
[signed]	The document was signed by all the signers. The document can be edited again.

The following statuses are also available:

Status	Meaning
[rejected]	One of the signers has declined to sign the document. The document can be edited again.
[expired]	At least one signature was not provided within the given period of time. The document can be edited again.

If you have access to your company's account in DocuSign, you can view a list of all the documents that are currently in the signing process.

Get document signed

Information

You can send PDF documents for signing. The signers do not need an ELO account or a DocuSign account for this.

Alternative

To have a contract document signed, use the Get contract document signed function.

Method

1. Select the document you want to have signed.
2. On the *Document* tab, click *Sign > Document for signing*.

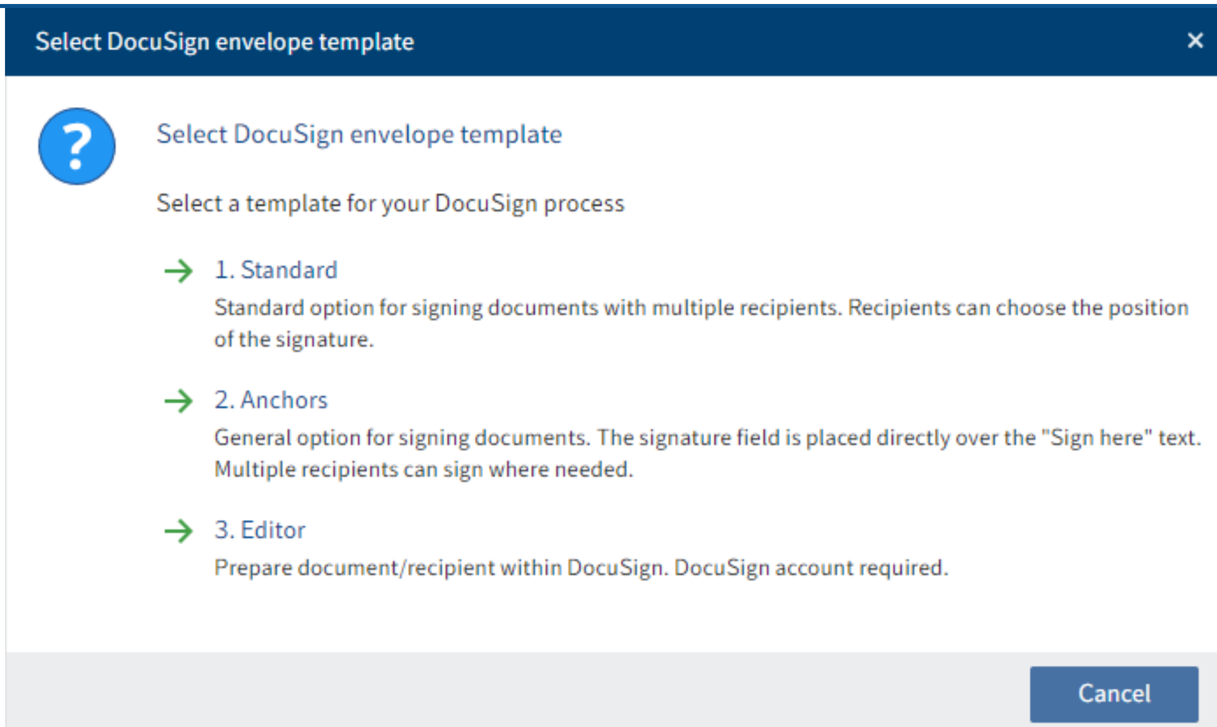


Fig.: 'Select DocuSign envelope template' dialog box

3. Select the template you want to use.

Standard or anchor

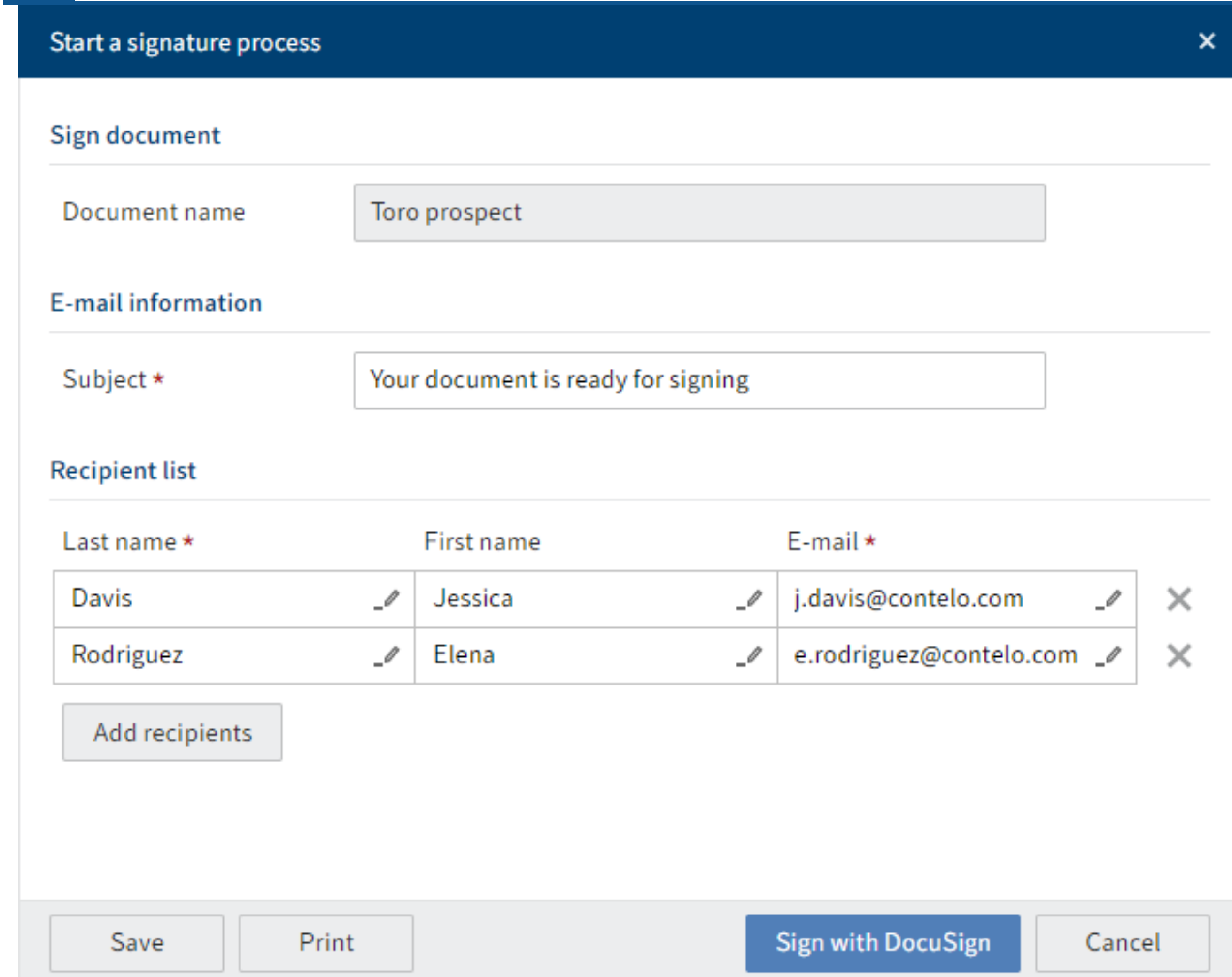


Fig.: 'Start a signature process' dialog box

1. In the *Start a signature process* dialog box, select who should receive the document for signature.

   The document will be e-mailed to the recipients in the order you select here. If you want to be the first to sign the document, put yourself at the top of the list.

2. Click *Sign with DocuSign*.

Result: Standard or anchor

The document is sent to the first e-mail address you entered. As soon as the document is signed, it is sent to the next e-mail address in the list.

In the repository, it is assigned the status [sent].

Outlook: Standard or anchor

If you do not get the signed document back or want to cancel the signing process for other reasons, contact a user with a DocuSign account in your company.

Editor

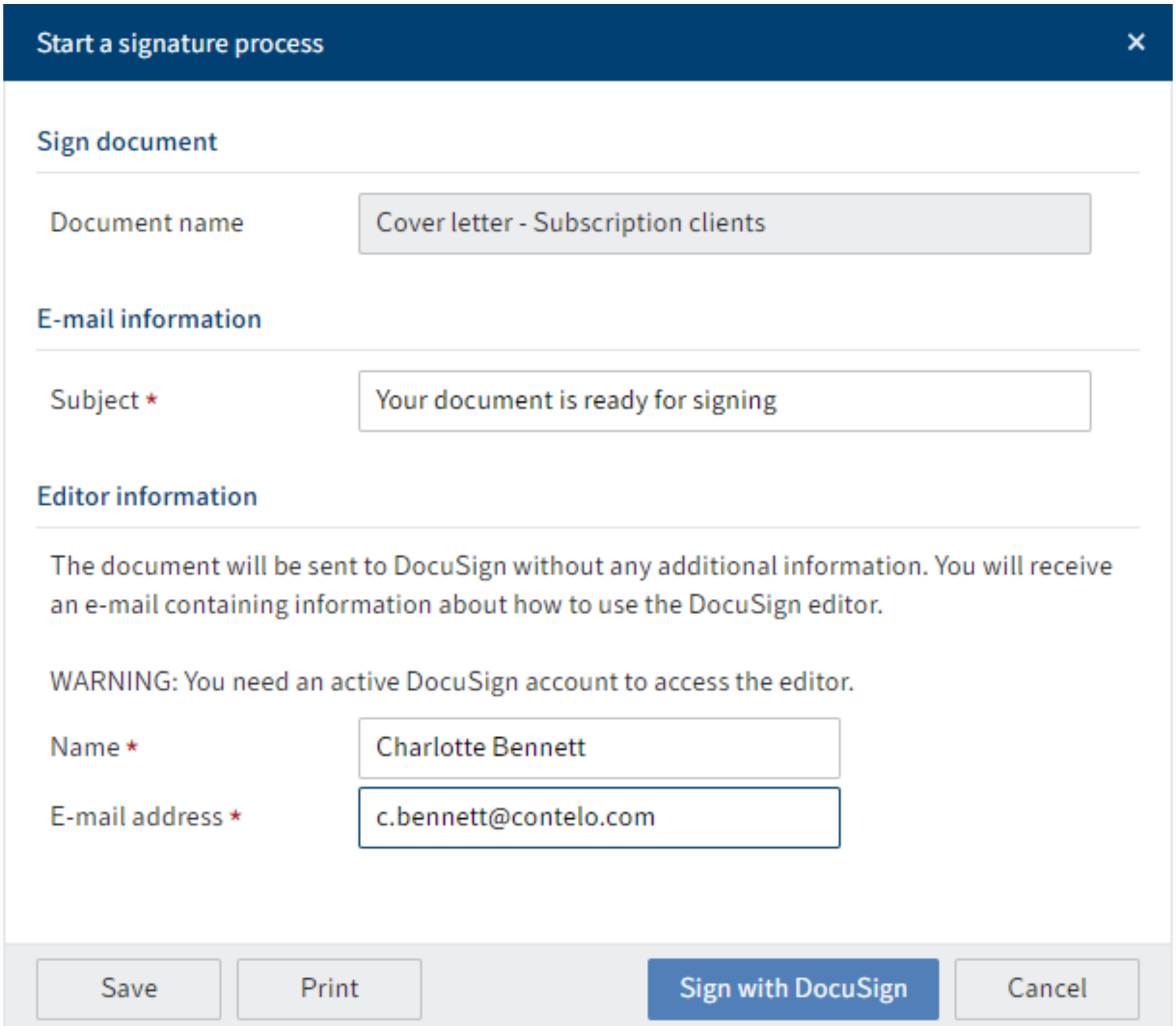


Fig.: 'Start a signature process' dialog box

1. In the *Start a signature process* dialog box, enter the e-mail address of the person who requires access to the DocuSign editor.

2. Click *Sign with DocuSign*.

Result: Editor

You will get an e-mail with a link that takes you to the editor in DocuSign. Change the settings as needed here.

Get more information about using DocuSign here: https://support.docusign.com/en/.

Get contract document signed

Information

You can send contract documents in PDF format for signing. The signers do not need an ELO account or a DocuSign account for this. Unlike the *Document for signing* function, the contractual partner is automatically extracted from the contract and does not have to be entered manually.

Method

1. Select the contract document you want to have signed.

2. On the *Document* tab, click *Contract document for signing*.

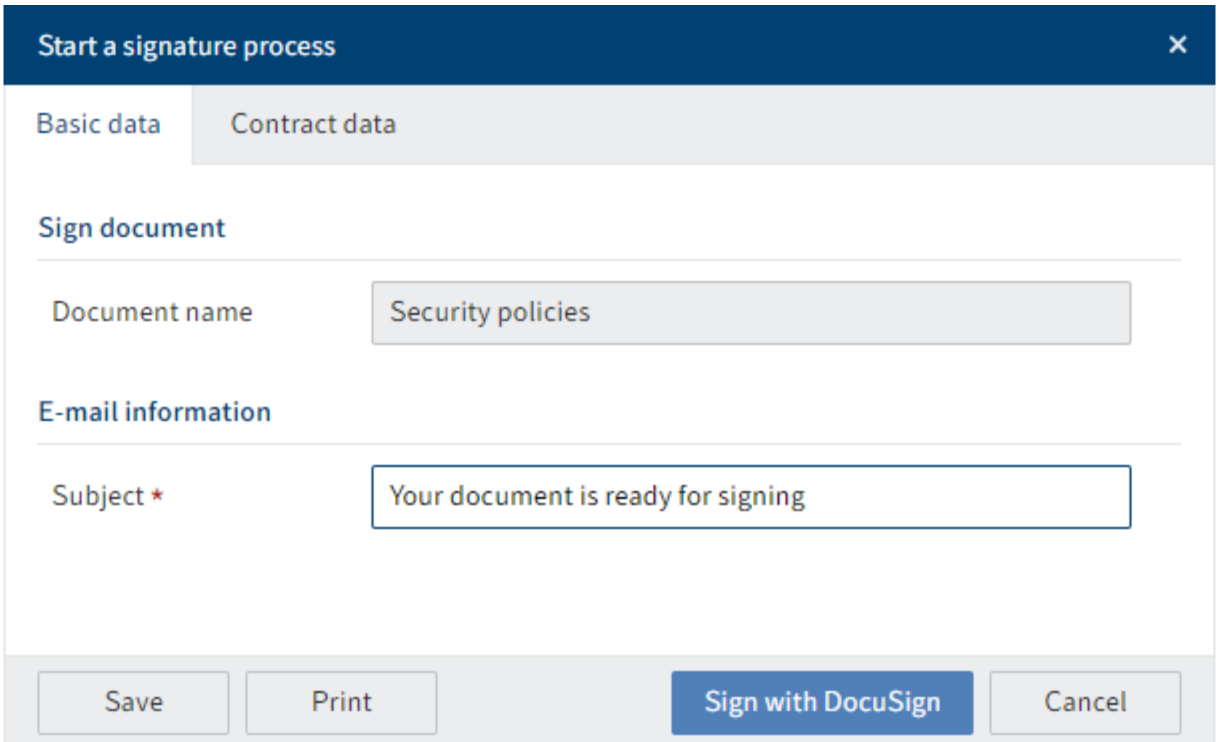


Fig.: 'Start a signature process' dialog box

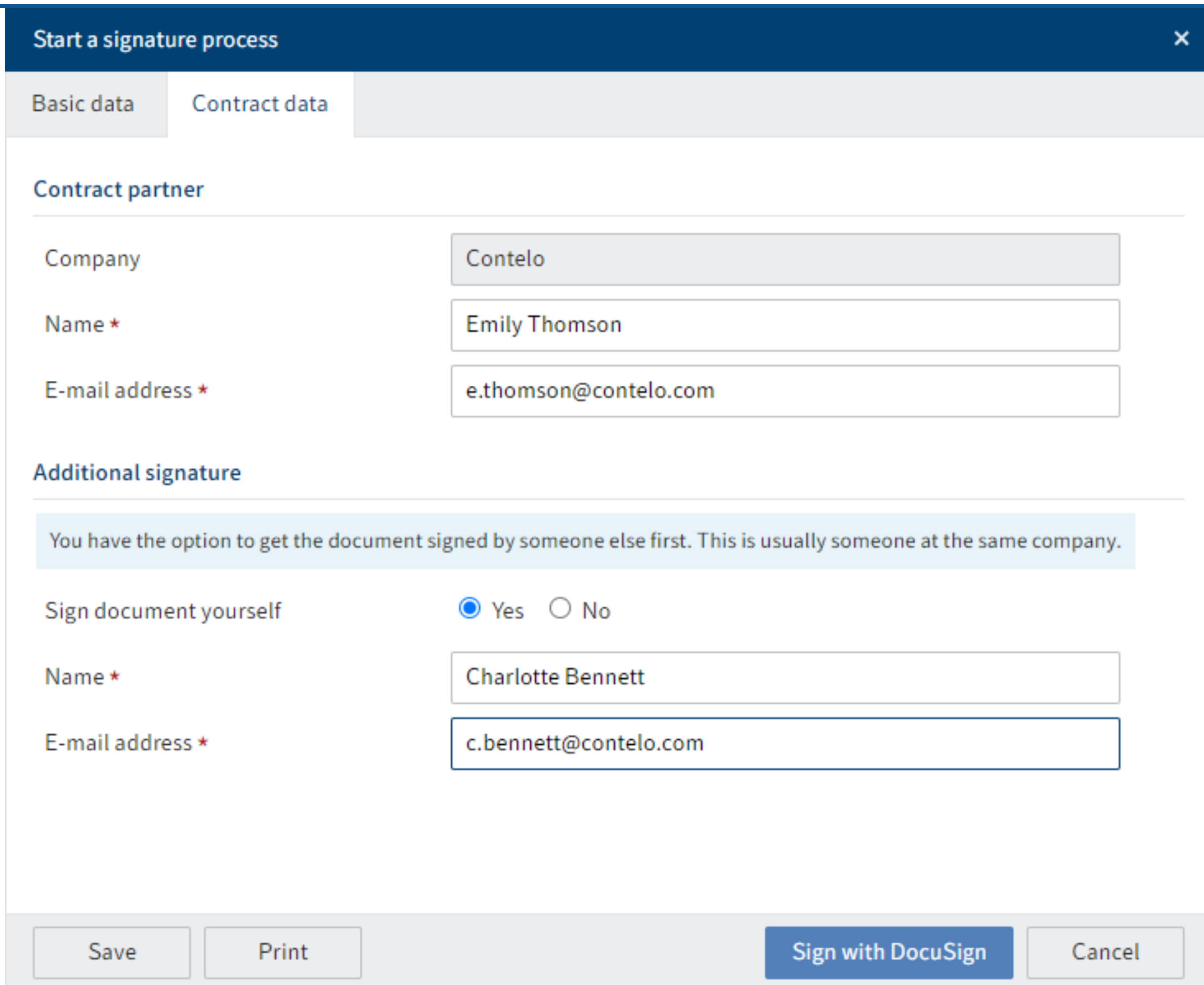


Fig.: 'Start a signature process' dialog box

The contractual partner is read out of the document.

You can have the document signed by another person.

3. Click *Sign with DocuSign*.

Result

The document can first be sent to the optional signatory and then to the contractual partner.

In the repository, it is assigned the status [sent].

Overviews

Reports and dashboards help give you an overview of your contracts.

Reports

Information

You can create reports to analyze contracts. A report is filed to your repository as an Excel table. When you create a report, it is only visible to you.

Reports are based on templates. These templates filter the contracts based on specified criteria.

The following reports are available:

- Contract report: This report type creates a report with the values within the selected folder.
- Cash flow: This report type creates a report with the cash flows for all contracts.

Method

1. Select the folder you want to create a report for.

   Information

   The contracts do not have to be located directly below the selected folder. But the more child folders there are, the more time it will take to create the report.

2. On the *New* tab, click *Contract > Create contract report* or *Contract > Create cash flow*.

Optional: Select a report template. If only one report template has been created, it is selected automatically.

Result: Contracts

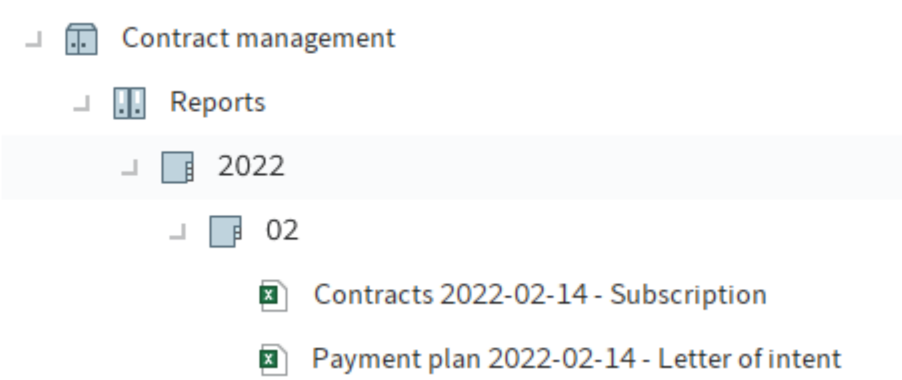


Fig.: Reports in the repository

The document with the contract overview opens and is created under *Reports* by default.

By default, the report contains the *Table1* and *Data* tabs.

Under *Table1*, you will find a visualization of the selected contracts. With a pivot table, you can customize the report and use it for calculations.

Under *Data*, you will find a list of selected contracts with the information preset in the report template.

Result: Cash flow

The document with the contract overview opens and is created under *Reports* by default.

By default, the report contains the *Data* tab. You will find a list of the cash flows here.

Dashboard

The dashboard provides an overview of all filed contracts.

You can reach the dashboard by clicking the *Contracts* tile in the *My ELO* area.

The dashboard remembers your settings. When you close then open the dashboard again, it remembers and displays your most recent view.

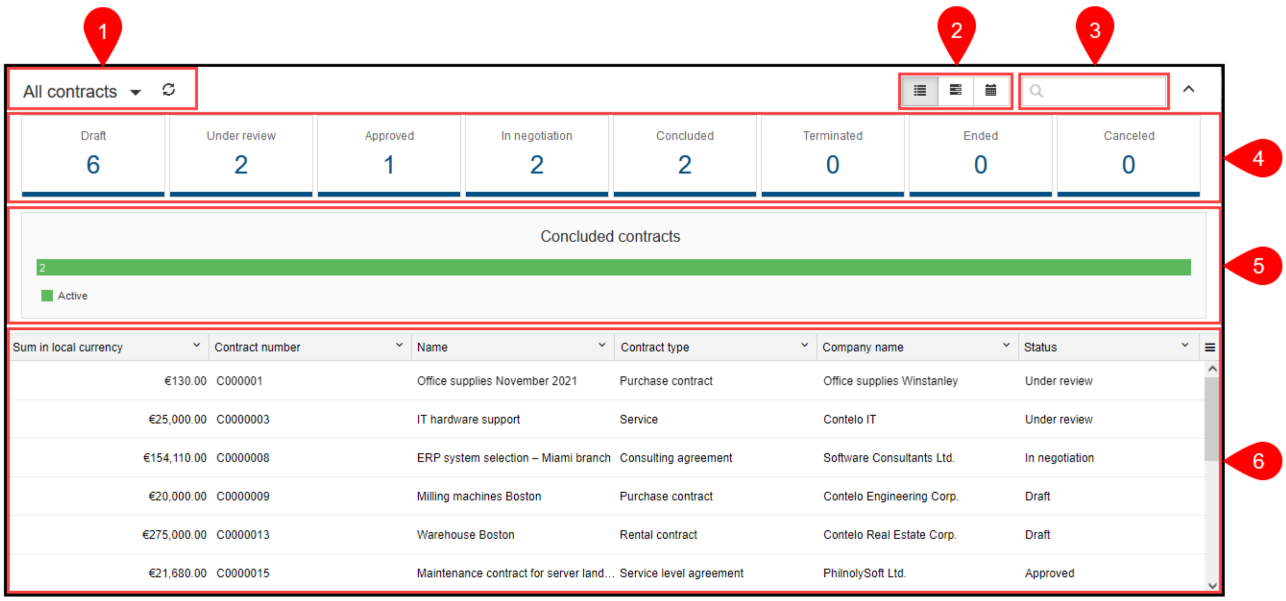


Fig.: Dashboard in the table view

The dashboard is divided into the following areas:

1 Database: In the dashboard header, use the drop-down menu (arrow icon) to select a database. A dashboard database is a list of contracts that is loaded for evaluation.

Information

> If there is only one database, this database is selected permanently and no drop-down menu is available.

2 Table/Timeline/Calendar: You can choose between three dashboard views: *Table*, *Timeline*, and *Calendar*.

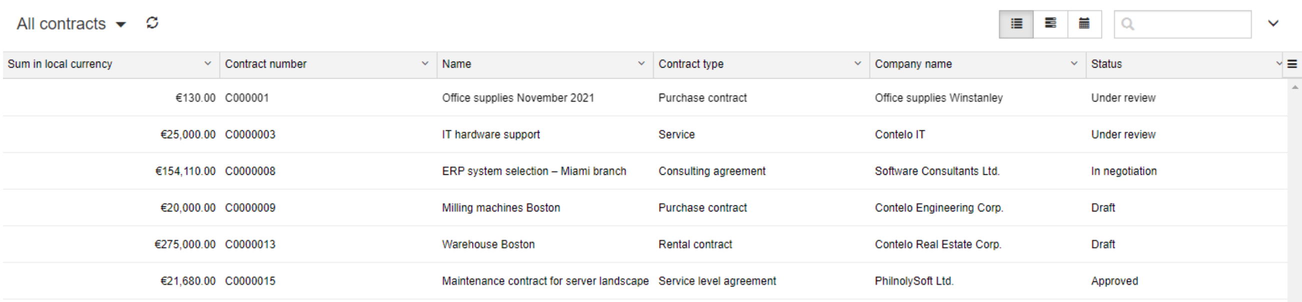
3 Search: In addition to text values, you can also search for deadlines and amounts. All data that you can select as column values in the table view serves as the basis.

4 Status: The dashboard header contains a button for each contract status. If a button is active, all contracts with the corresponding status are shown in the dashboard viewer pane.

5 Concluded contracts: If concluded contracts exist in the database, a bar appears with the statuses of the concluded contract. Entered contract deadlines serve as the basis.

6 Viewer pane: In the dashboard viewer pane, you will see a list of contracts. This list changes depending on the filter criteria applied.

Table



Sum in local currency	Contract number	Name	Contract type	Company name	Status
€130.00	C000001	Office supplies November 2021	Purchase contract	Office supplies Winstanley	Under review
€25,000.00	C0000003	IT hardware support	Service	Contelo IT	Under review
€154,110.00	C0000008	ERP system selection – Miami branch	Consulting agreement	Software Consultants Ltd.	In negotiation
€20,000.00	C0000009	Milling machines Boston	Purchase contract	Contelo Engineering Corp.	Draft
€275,000.00	C0000013	Warehouse Boston	Rental contract	Contelo Real Estate Corp.	Draft
€21,680.00	C0000015	Maintenance contract for server landscape	Service level agreement	PhilnolySoft Ltd.	Approved

Fig.: Table view

Clicking an entry shows a preview of the entry. Double-clicking an entry brings you to the repository.

Customize the table view using the drop-down menus.

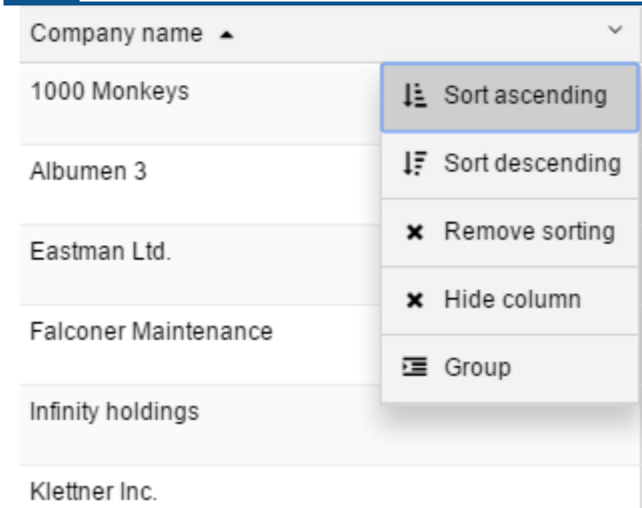


Fig.: Customizing the table view

The drop-down menus in the column headings contain the following functions:

- Sort ascending
- Sort descending
- Remove sorting: This option appears if you have sorted the column.

Alternative: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts the items in descending order. Clicking a third time clears sorting.

- Hide column
- Group: The content of a column is joined into groups. The number of contracts in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained contracts. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

Information

You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

- Ungroup: This option appears if you have grouped items. Click *Reset grouping* to discard the group.
- Agg: Total (only for number fields and when another column is grouped): The total of the group is shown.
- Agg: Minimum (only for number fields and when another column is grouped): The lowest value of the group is shown.
- Agg: Maximum (only for number fields and when another column is grouped): The highest value of the group is shown.
- Agg: Average (only for number fields and when another column is grouped): The average of the group is shown.

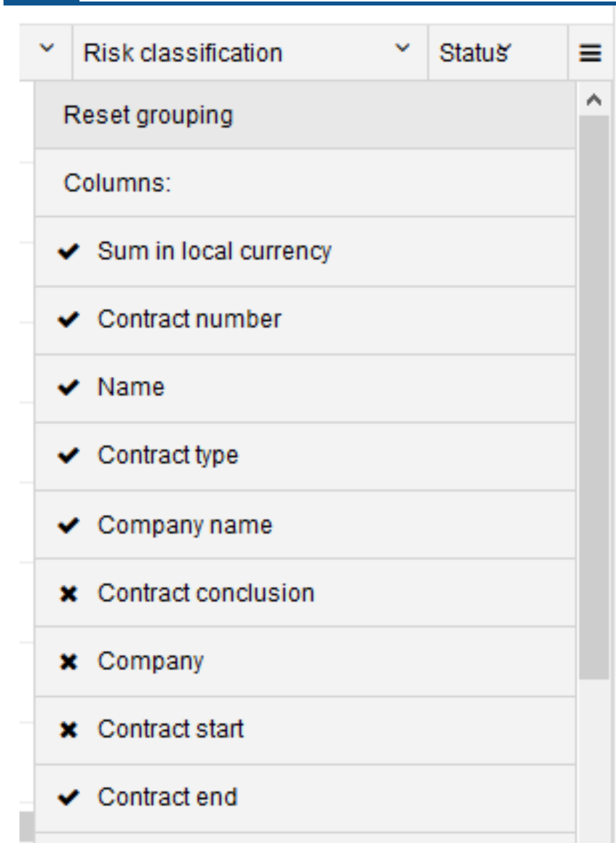


Fig.: Overview of all columns

Menu: You can show hidden columns.

Timeline

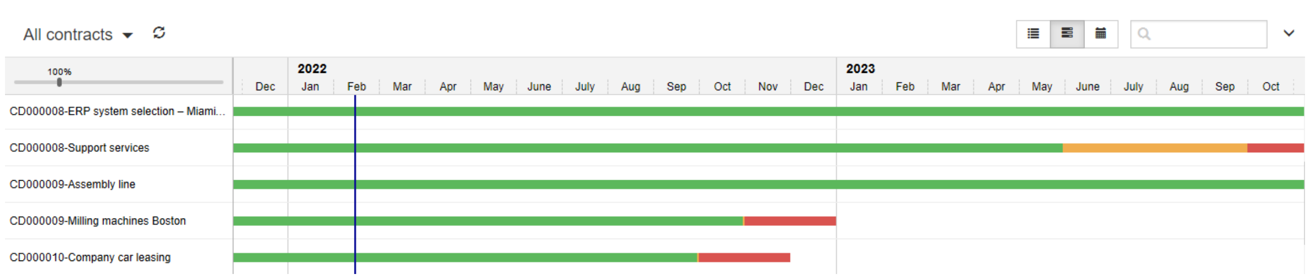


Fig.: Timeline view

The timeline view visualizes the duration of contracts with color bars.

If the beginning or end of the duration is outside of the time frame shown, this is indicated by an arrow at the beginning or end of the bar.

You can recognize the contract status by the color.

- Green: Active contract
- Yellow: Termination deadline coming up
- Red: Contract expiring
-

Green-expiring: Contract with extension

The current day is marked with a vertical blue line.

Calendar

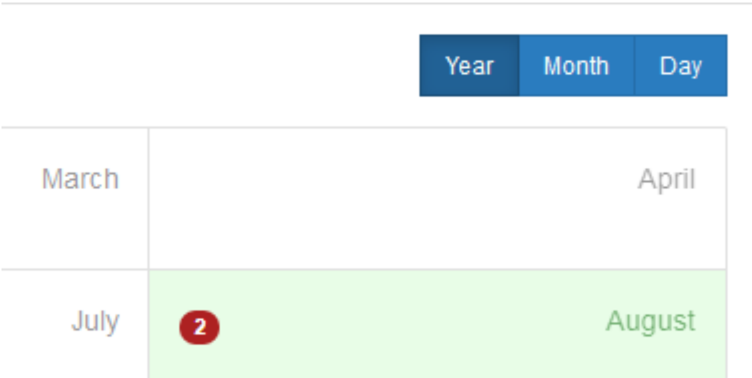


Fig.: 'Year', 'Month', and 'Day' buttons

The calendar offers three options: *Year*, *Month*, and *Day*.

Reminders, termination deadlines, and contract end dates are shown in all views.

Information

Only contracts with deadlines are shown in the calendar view.

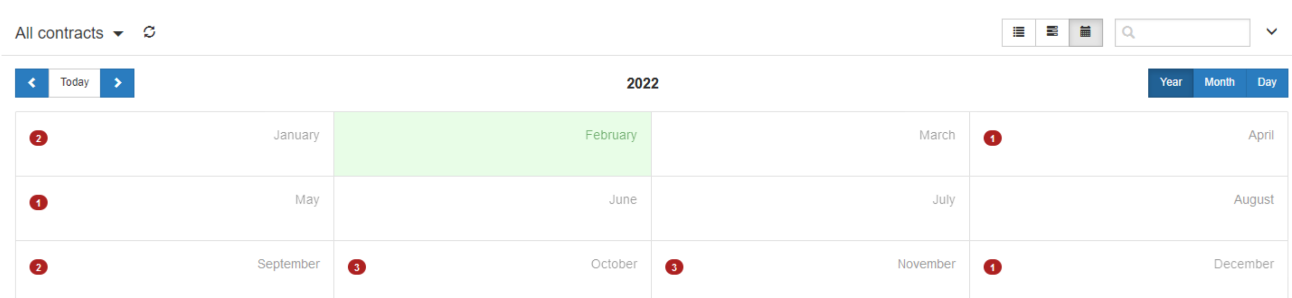


Fig.: Annual view

Year: The annual view shows the number of contract deadlines each month. For more detailed information on a month, click the month.

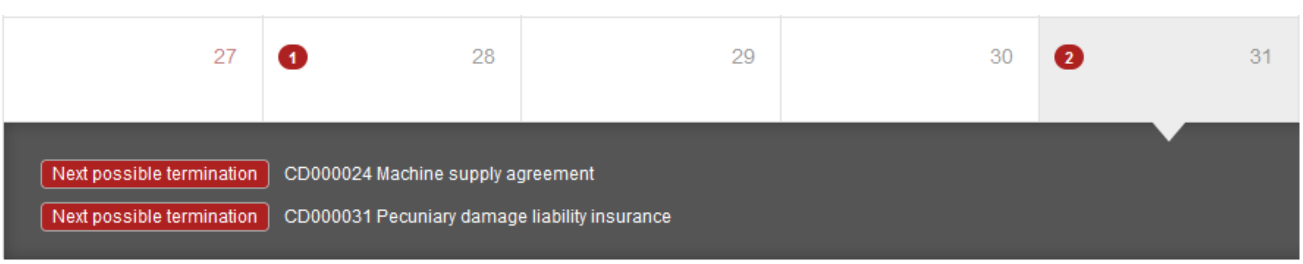


Fig.: Month view

Month: The month view shows the number of contract deadlines each day. For more detailed information on a day, click the day.

To preview a contract, click the contract.

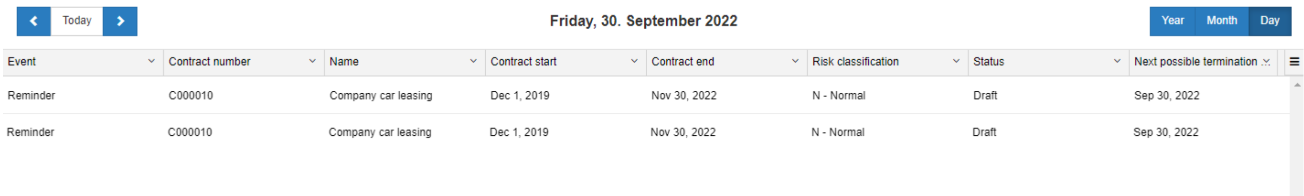


Fig.: Day view

Day: The day view lists the contracts for the selected day. It works in the same way as the table view.

Contact management

You can save companies and contacts to speed up the process of creating new contracts. If you select a contact when creating a contract, the data stored for this contact is automatically entered in the correct fields.

When creating a contract, you can save the contact you have entered or use the following functions on the *Contact* tab:

- New contact list
- New company
- New contact

Create overview of contacts

To get an overview of your contacts, use the *Create overview of contacts* function. The overview of contacts is filed as a PDF document at the selected position.

Create contact label

When you select a contact from your contact list, the *Contact* tab opens containing the *Create contact label* function.

This function creates a contact label that is stored in the contact's folder.

The label contains information on the contact as well as a QR code. If you print the label using a label printer and store it in a physical folder, you can scan the QR code with a mobile end device to go straight to the digital folder.

If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.

You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.