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## Create a new Agreement

An agreement is described as a type of contract that your organization signs with two or more parties or a third party for legal or business purpose.

In this tutorial, we will understand how to create an agreement from the Agreement tile on the ICM Homepage.

### To create an agreement from ICM Home Page:

1. On the ICM Home page, click **Agreements**.
2. The **Agreements** page consists of the following tabs.
  - Contract Type Details
  - Attributes
  - Select Template
  - Verify

## Contract Type Details

On the *Contract Type Details* page, enter the following information and click **Next**.

Field	Description
Category	Select the appropriate category from the drop down list. In this example, we will select <b>Default</b> .
Contract Type Name	Select the appropriate contract type name from the drop down list. In this example, we will select <b>MSA</b> as the contract type name.
Type of Paper	Select the appropriate type of paper. In this example, we will select <b>Own</b> .

## Attributes

The fields that appear on the **Attribute** tab vary based on the contract type you select.

On the **Attributes** tab, enter the following information.

- Organization Unit: Select the organization unit to which you belong.



Under Organization Unit, you will find the following sections.

- General Info
- MSA Info
- Other Info
- Supplier Info

Now, let us go through each section in detail.

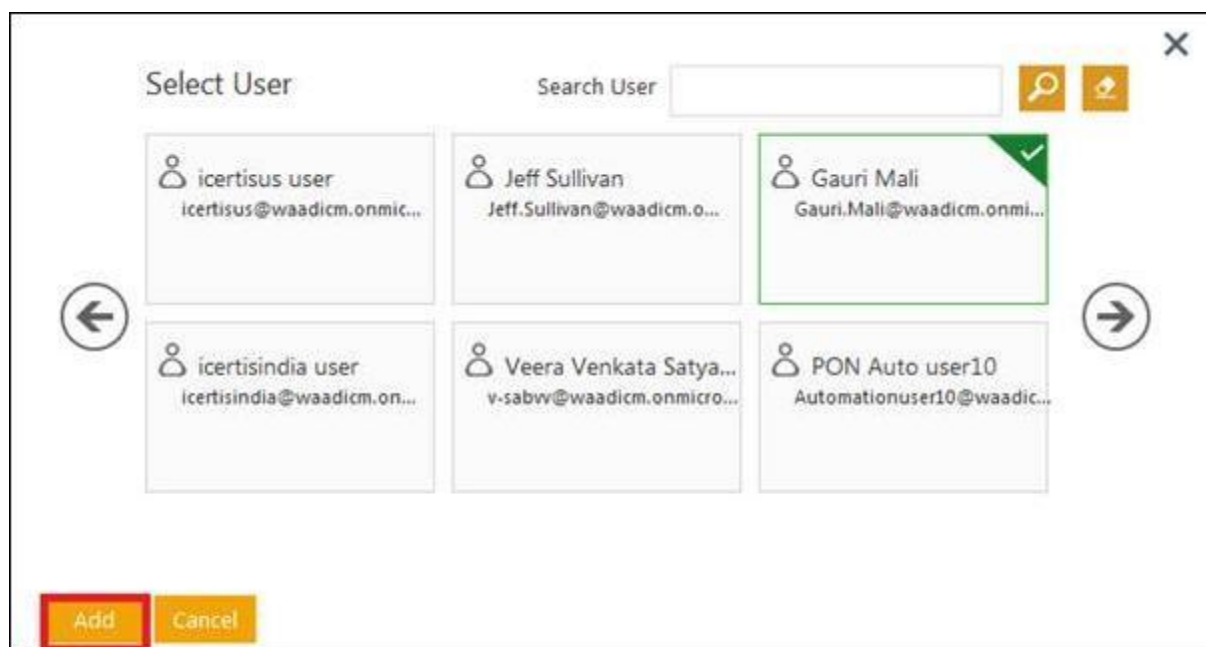
### General Info



Enter the following information under the **General Info** section.

Field	Description
Agreement Code	It is a unique agreement id that is generated automatically once you complete the agreement creation process.
Name	Enter an appropriate name of the agreement. In this example, we will enter <b>MSA for IT services</b> .
Effective Date	Enter or select the appropriate effective date for the agreement.
Expiry Date	Enter or select the appropriate expiry date for the agreement.
Signature Type	Select the appropriate signature type for the agreement. In this example, we will select <b>Electronic Signature</b> .
External Signatory	Click the  icon to select an external signatory or third party user for the agreement.
Internal Signatory	Click the  icon to select an internal signatory for the agreement.

**To add an external or internal signatory:**

- On the *Select User* page, select the user that you want to add and click **Add**.



**Note :** If you want to search for a specific user, click  icon. If you want to reset your search, click  icon.


## MSA Info

Enter the following information under **MSA Info** section.




Field	Description
Contract Value	Select an appropriate contract value for the agreement. In this example, we will select the contract value as <b>1</b> .
Select Currency	Select an appropriate currency from the drop down list. In this example, we will select the currency as <b>USD</b> .

## Other Info

Enter the following information under **Other Info** section.

Is Amendment	Select <b>Yes</b> if you want to allow making amendment to this agreement, else select <b>No</b> . In this example, we will not allow making amendment so we will select <b>No</b> .
Parent Contract	Click  to search for the Parent Contract.

On the *Lookup Search* page, select the appropriate contract name and click **Select**.

Previous Agreement Id	<p>Click  to view the list of agreements created earlier.</p> <p>On the <i>Select Agreement</i> page, you can select the required agreement.</p> <p>To select an agreement, select the agreement on the <i>Select Agreement</i> page and click <b>Add</b>.</p> <p><b>Note:</b> You can also search for a specific agreement by clicking the  icon. To close the <i>Select Agreement</i> page, click  icon.</p>
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## Supplier Info

Enter the following information under **Supplier Info** section.

Field	Description
Supplier Name	Select the appropriate supplier name from the dropdown list. In this example, we will select the supplier name as <b>Cloud</b> .

**Note:** Once you select the supplier name, information in the following fields will be auto-populated.

- Supplier Code
- Supplier Contact
- Supplier Contact Person
- Supplier Email

Enter the required information in the following fields.

Field	Description
Site Locations	Select the appropriate site location from the drop-down list. In this example, we will select the site location as <b>US</b> .
Company URL	Enter the appropriate URL of the company. In this example, we will enter the company URL as contoso.com
Link Text	Enter the appropriate link text for the company URL that you entered. In this example, we will the link text as <b>Contoso</b> .
Company Profit	Select the appropriate percentage of company profit.
Summary	Enter the appropriate text for summary of the agreement. In this example, we will enter the summary as <b>This is the summary of the MSA Agreement</b> .

### Create Agreement - MSA

- 1 Contract Type Details
- 2 **Attributes**
- 3 Select Template
- 4 Verify

Organization Unit: /icertis

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#### General Info

Agreement Code	<input type="text"/>	?
Name	MSA for IT services	?
Effective Date	May 10, 2016	?
Expiry Date	June 10, 2016	?
Signature Type	Electronic Signature	?
External Signatory	Gauri Mali;	?
Internal Signatory	Gauri Mali;	?

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#### MSA Info

Contract Value	1.00	USD	?
Contract value is grated than 1000	<input checked="" type="checkbox"/> No		

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#### Other Info

Is Amendment	<input checked="" type="checkbox"/> No	?
Parent Contract	ICMMSA_168	?
Previous Agreement Id	<input type="text"/>	?





## Select Template

On the **Select Template** tab, select the appropriate template as shown in the image below and click **Next**. In this example, since we are creating an MSA agreement, we will select **MSA Template**.



## Verify

On the **Verify** tab, verify all the information that you have entered for creating the agreement.

You can perform the following tasks from the *Verify* tab.

Button	Description
Previous	Click <b>Previous</b> to go back to the earlier pages and make changes, if any.
Create	Click <b>Create</b> to create the agreement.
Create and Publish	Click <b>Create and Publish</b> to create and publish the agreement.
Create and Send for Approval	Click <b>Create and Send for Approval</b> to create, publish, and send the agreement for approval.

**Note:** When you click **Send for Approval**, the agreement is sent to the approver that is set by a rule. If no rules are set on a particular contract type, the agreement status changes to **Approved**.

Once you click **Create**, the *Agreement Details* page appears on which you can perform the following functions.

- **Lock:** This allows you (primary owner) to lock the agreement. Only you (primary owner) can unlock the agreement.
- **Collaborate:** This allows sharing the agreement with external users.
- **Confidential:** This allows making the agreement confidential.

- **Edit:** If you want to make changes to the agreement, click **Edit** to go back and edit the agreement.
- **Publish:** Once you click the **Publish** button, the agreement goes into the **Draft** state and the following options are available.
  - **Download:** To save an agreement on your local computer.
  - **Download All:** To save an agreement and its associated documents on your local computer.
  - **Upload Document:** To upload the document in ICM.
  - **Lock:** To lock the agreement and restrict others from taking any action on it.
  - **Edit:** To make changes to an agreement.
  - **Confidential:** To move an agreement to a confidential organization unit.
  - **Assemble Contract:** To include the associated documents if any along with the agreement.
  - **Request Review:** To send the agreement to the reviewer for review.
  - **Send for Approval:** To send the agreement to the approver for approval.