Contracting Al User Guide



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1 Contracting Al overview

Contracting AI is an AI-powered web-based application that automates the, creation and negotiation of contracts. The application works by ingesting all of bp's supplier contracts and analysing these, to recommend standard bp approved clauses and bp pre-approved clause options from these clauses.

All of the clause options in the application are clauses that bp have agreed to in the past, and it is entirely up to you whether you choose to select one of these or remain with the standard bp clause option. Any clauses with no clause options mean that bp have previously never had to negotiate a change to that clause.

Each deviation may cost a number of allocated points based on the impact to the bp business. All suppliers will be allocated 100 points at the start of the process, enabling you to freely use this allocation to carry out changes to the contract as required.

Any proposed amendments remain confidential to you until your nominated person submits the contract. The contract is then saved as a pdf and becomes visible to bp.

The commercial aspect of the contract and any Statement of Works are still negotiated outside the application.





What's in it for me as a Supplier?

Contracting AI automates the analysis, creation and negotiation of contracts. We're using it at bp to accelerate the negotiation prcess of T&Cs and increase value creation between us and our suppliers.





Streamlined negotiation process

Save time, money and effort by removing the need for multiple rounds of manual red lining and digitising the negotiation process.







Easily identify negotiable clauses

Negotiable clauses are clearly presented enabling you to tailor the contract to meet your exact requirements.



Add colleagues to internally review the contract or defined clauses and collaborate using private messaging.



Win-win negotiation outcomes

Spend allocated 'points' on defined clause options to achieve a favourable outcome for both you and bp.

Increased process transparency

Internal visibility of amendments you've made and where you are in the contract evaluation process enables greater control.

Collaborate with internal reviewers

3.1 Registration & login

Upon receiving an invitation to join a deal or contract, follow the link to complete the user registration, if you do not already have an account.

There is no cost for registration.

Populate all of the required information and register your account.

Once you've done this, you can sign in to the application via the Access Contract button and get started!





Powered by Contract Qi

Laura Weir,

We are glad to inform you that **Laura Weir Inc** has qualified as a potential supplier. Please refer to the details below.

Deal name: Test for Laura Inc.Plc Customer/Client name: BP

The review period for this deal is 6 days beginning on 09/24/2020.

Don't have an account? Register here

Access Contract

If you have any questions, feel free to message us at support@apporchid.zendesk.com

3.2 Registration & login

After you've logged in, the initial pop up window displays instructions on how to navigate through the application.

Select the Do not show this again checkbox to stop displaying these instructions after every login.





Welcome Laura Weir Inc

It uses App Orchid as a prerequisite to qualify suppliers to participate in their sourcing events. This tool will guide you through the process to agree a contractual framework with company that can be executed if you are successful in the future sourcing event. Suppliers must refrain from contracting any company employees directly regarding this process.

Don't Show this again

3.3 Registration & login

The landing page will display the contract you have been invited to negotiate, as well as any other contracts previously negotiated using Contracting AI.

From here, you can check the status of your contract(s), the progress you have made in reviewing and acknowledging the clauses, as well as the expiry date of the contract negotiation period.

You can see the categorisations of your contracts based on the progress and status in the top left corner. For example, **In Progress** indicates the contracts that you have started to review and **Signed** indicates that a contract has been reviewed and submitted back to bp. **Pending** means no action has been taken on the contract.

To help you search through your contracts, there are filtering options on the bottom left-hand side and a search box for inputting key words.





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All Contracts								
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Pending	Laura Weir Inc Testing 2	Last updated Oct 14, 2020	Signer Laura Weir	Point of Conta Laura Weir	Viewed 0%	Acknowledged	Close date Jan 10, 2021 87 days remaining	ì
In Progress	Test For Laura	Last updated Oct 05, 2020	Signer Laura Weir	Point of Conta Laura Weir	Viewed	Acknowledged	Close date Oct 10, 2020 Expired	ł
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3.4 Registration & login

You can access your profile by clicking on the icon displaying your initials in the top right hand corner.

If required, you can change your password by clicking the Change Password option from the user profile menu.





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4.1 Review contract

From the landing page, navigate to the deal or contract you want to review and click on it to open the contract. You will arrive on the contract page, where you can see each clause in the contract from the menu on the left.

After clicking on a clause, the related sub-clauses appear on the centre of the screen. You will see a dashed line under a sub-clause to indicate that it has alternative options available, click on the sub-clause to see the various options on the right of the screen.





If you hover over any terms that have a solid line underneath them, it shows you the definition for that term.



4.2 Review contract

The number of points each sub-clause is worth is outlined below the deviation, based on its weight or risk profile. When you select your deviation, the points will be deducted from the total of the allocated points - you can see this at the top of the screen.

A red dot will also appear in front of all clauses where you have made a change by selecting one of the clause options. Once you have reviewed all sub-clauses within a given clause, select the Acknowledge checkbox available at the bottom.

A tick will then show up once you have acknowledged the section. This helps you to track your progress as you navigate through the contract review.

There is an option to acknowledge all areas, upon clicking the Finalize button, rather than completing them individually.





You can use the search bar on the left to search for clauses using keywords.



Rema 85

Stage of contract

IN PROGRESS BEING GENERATED SUBMITTED IN BUYER REVIEW RESULT

3. Scope of Services

- 3.1 From the relevant Service Commencement Date, the Supplier shall provide the Services and meet any applicable Service Levels in each case in accordance with the terms of the applicable Release Order. In addition to the Services, and except where specifically stated otherwise in a Release Order, the Applicable Supplier shall, at its cost, provide all activities, functions, responsibilities and obligations for the proper provision of, ancillary to or customarily included as part of the Services.
- The Services and any deliverables provided under a Release 3.2 Order may be subject to acceptance by the Customer pursuant to any acceptance process and acceptance criteria set out in or referred to in the Release Order.

3. Scope of Services Schwarz Acknowledged

View notes



 From the relevant Service Commencement Date, the Supplier shall provide the Services and meet any applicable Service Levels in each case in accordance with the terms of the applicable Release Order. In addition to the Services, and except where specifically stated otherwise in a Release Order, the Applicable Supplier shall, at its cost, provide all activities, functions, responsibilities and obligations for the proper provision of, ancillary to or customarily included as part of the Services. ORIGINAL CLAUSE Points : 0

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4.3 Review contract

As you navigate through each section of the template and review the associated clauses, the bar on the left-hand side shows the progress you have made in reviewing the contract.





Remaining	points
85	

Stage of contract

IN PROGRESS BEING GENERATED SUBMITTED IN BUYER REVIEW RESULT



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3. Scope of Services

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- 3.2 The <u>Services</u> and any deliverables provided under a <u>Release</u> <u>Order</u> may be subject to acceptance by the Customer pursuant to any acceptance process and acceptance criteria set out in or referred to in the Release Order.

3. Scope of Services Schward Schwa

5.1 Supplier collaboration

To facilitate the contract review and support collaboration with colleagues in your organisation, you have the ability to add reviewers to the contract and share notes with them to review, before you finalize it.

To add a note to the contract, select the sub-clause you wish to add a note to and then click on the Add Notes button in the right-hand corner. It's important to know that these notes will only be visible to you and the reviewers you add from your organisation – no one from bp will be able to see these.

Once you have added a note to a sub-clause, an orange mark appears next to the Clause in the menu on the left.

You or any of your reviewers can then see which clauses have notes against them.





6. Information Security	90	IN PROGRESS BEI	ING GENERATED BUBMITTED IN BUYER REVIEW RESULT	+ Finalize
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5.2 Supplier collaboration

Once the comment has been addressed, you can then mark the note as resolved using the check box.

You can check all notes in a contract using the button on the bottom left hand corner. Use this to ensure you have not missed any notes left by your colleagues. After completion, all notes are removed to ensure confidentiality for your organisation.





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5.3 Supplier collaboration

You have the ability to add reviewers from your organisation to the contract, for example from legal or compliance, to verify specific clauses or sub-clause options.

You can add a reviewer by clicking on the plus icon in the top right-hand corner. A pop-up box will appear, where you can add the reviewer's email address. You can add multiple email addresses for multiple reviewers by separating their emails with a comma.

Reviewers will receive an invitation to register for the application and should follow the steps outlined at the start of this guide in order to view the contract.





Click on the question mark on the bottom left of the page to display a list of frequently asked questions.



Remaining points	Stage of contract		(+)	
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Laura Iaura	Weir @bp.com	×		
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Prov	isions) to the Release Order as appropriate;			
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6.1 Finalize contract

Once you have acknowledged all clauses in the contract, you may finalize the contract by clicking the Finalize button in the upper-right corner of the screen.

Once clicked, it brings up a scanning for contract errors window, which shows you if you missed any required fields that need populating, checks if you used more points than allotted and shows any unresolved notes.

There is also an option to acknowledge all areas rather than completing them individually.





al points)		Stage of contract	+	Finalize
	3.	Scope of Services	Clause Options	View notes
	3.1	From the relevant Service Commencement Date, the	 3.1 Scope of Services 	×

- Supplier shall provide the Services and meet any applicable Service Levels in each case in accordance with the terms of the applicable Release Order. In addition to the Services, and except where specifically stated otherwise in a Release Order, the Applicable Supplier shall, at its cost, provide all activities, functions, responsibilities and obligations for the proper provision of the Services.
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3. Scope of Services Scope of Services

Order, the Applicable Supplier shall, at its cost, provide all activities, functions, responsibilities and obligations for the proper provision of, ancillary to or customarily included as part of the Services.

specifically stated otherwise in a Release

ORIGINAL CLAUSE Points : 0

From the relevant Service Commencement Date, the Supplier shall provide the Services and meet any applicable Service Levels in each case in accordance with the terms of the applicable Release Order. In addition to the Services, and except where specifically stated otherwise in a Release Order, the Applicable Supplier shall, at its cost, provide all activities, functions, responsibilities and obligations for the proper provision of the Services. Points: 10

6.2 Finalize contract

Once you finalize the contract, verify the user details, before sending the contract and completing the contract negotiation process.

Please note by clicking finalize this is seen as contractual acceptance and no further changes can be made post this point. A workflow is triggered which converts all of your changes into a pdf version of the contract.

You will not be able to finalize your contract if you have used more than your allocation of points.





	ContractAl - Collaboration	Case Management User Guide	1
Remaining points 90	Stage of contract	+ Protor	×
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10.00	good shape before you finalizing.		
	No mission fields		
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	Min clauses are acknowledged.		
	All notes are resolved.		

7 Where to get help?

To further guide you, access our demo videos that help you navigate through the Contracting AI application.

These videos can be accessed through the initial pop up instructions, once you have logged into the application. You may also return to these videos at any point, via the video button displayed in the bottom-left of your screen on both the home page and contract review page.

If you need help with a general query or any technical issues, get in touch with your bp point of contact who will be able to assist you further.







