

Carizma in Focus

Key Features for Smarter Contract Management

CONTRACT MANAGEMENT SOLUTIONS

carizma





Carizma transforms your contract management – simple, efficient, and secure. Keep in control at every step.



Contract Management

Say goodbye to scattered data and missed deadlines. Carizma centralizes all your contract information, from partner details to critical milestones, keeping you in control at every step.

- Centralized storage of all contract data, including partner details, deadlines, obligations, and risks.
- Advanced monitoring tools for deadlines and obligations with automated reminders.
- Recording of crucial contractual terms and defining if such terms are according to company standard. This information is used for contract summary reporting and searching – "identify all contracts where the liability limitation deviates from company standards".



Case Management

Carizma empowers organizations to handle even the most intricate cases, providing a 360° view of all workflows, documents, and associated agreements. Whether managing inquiries to the legal department), pre-contractual negotiations, legal disputes, or large-scale projects, Carizma ensures all relevant details are organized, accessible, and actionable.

- Comprehensive Case Management: Easily manage a wide variety of case types, such as legal disputes, licensing opportunities, and procurement processes. Carizma centralizes all associated, documents, emails, and metadata, ensuring nothing gets overlooked.
- Linked Agreements and Documents: Effortlessly associate agreements and documents with cases to provide a holistic view of related activities.
- Contracts are created from cases by launching the self-service module, where metadata recorded in the case is pre-filled in the wizard.
- Comprehensive Tracking: Keep track of all associated documents, emails, and workflows with ease.



Document Management

Empower your teams with intuitive tools to create, edit, version, and finalize documents – all seamlessly integrated with MS Office. Carizma enables effortless organization, annotation, and tracking of every change, ensuring robust compliance and streamlined workflows.

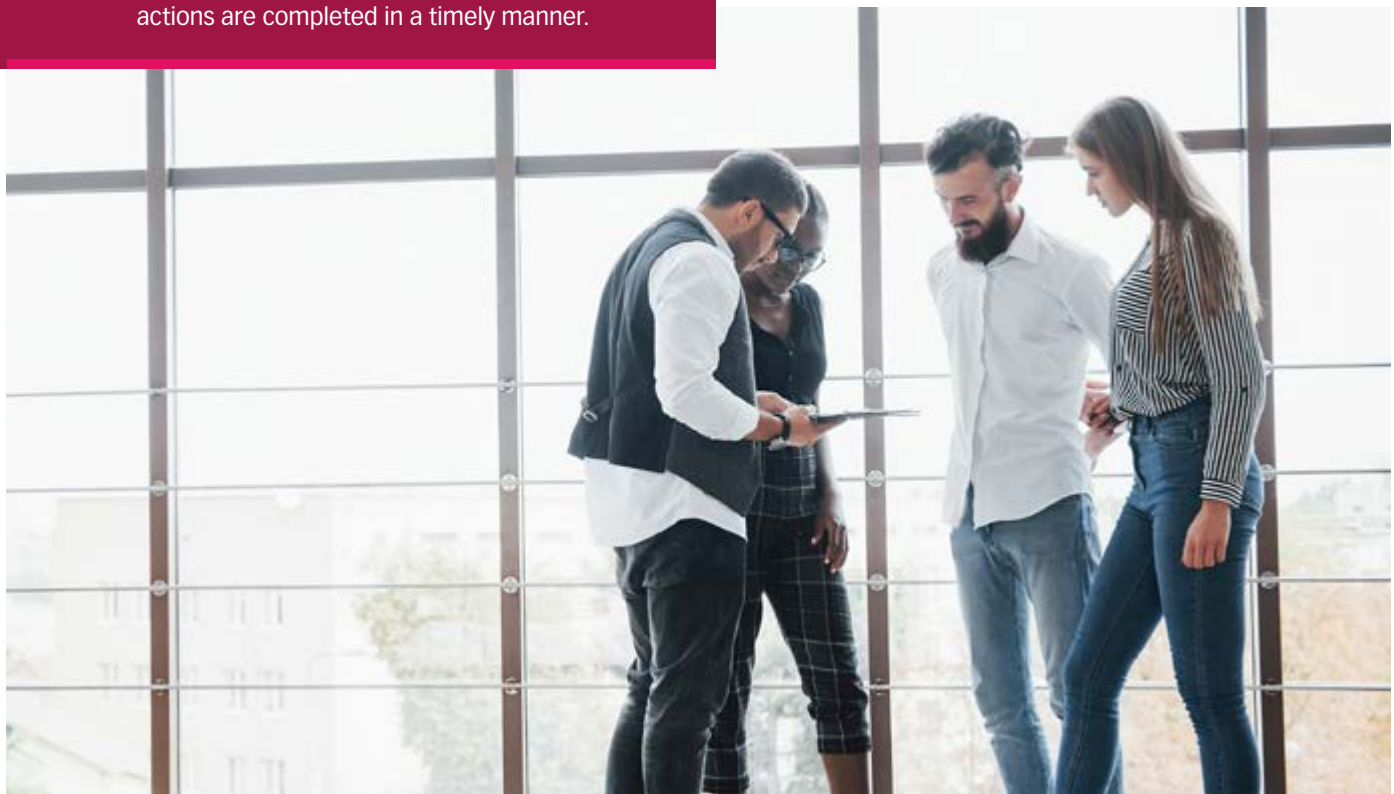
- MS Office Integration: Edit and track documents within a familiar environment, boosting productivity and reducing the learning curve.
- Template-Based Document Generation: Leverage pre-approved templates to generate documents efficiently and maintain consistency across your organization.
- Version Control with Check-In/Check-Out: Keep track of changes and maintain document integrity with comprehensive versioning functionality.
- Automated Folder Structures: Organize documents with auto-generated folder structures tailored to your needs, ensuring systematic and accessible storage.
- Drag-and-Drop Functionality: Easily import external documents and emails for centralized management.
- Multi-Level Approval Processes: Ensure transparency and control with customizable workflows for document approvals.
- Advanced Tools for Document Handling:
  - Compare MS Word documents (standard) and PDF documents (add-on)
  - Convert documents to PDF or merge several into one cohesive file.
  - Enhanced Content Comparison Using AI: In addition to standard comparison functionality in MS Word, Carizma uses OpenAI in Azure to evaluate changes in document content. This ensures that semantic shifts or alterations to the intent are detected, providing deeper insights into the impact of revisions.
- Integrated eSignature Support: Streamline signing processes with support for DocuSign, Adobe Sign, or FP Sign, ensuring legal and compliant digital signatures.

Predefined Process Steps for Cases and Contracts

Carizma ensures seamless workflow management by automatically generating process steps tailored to the type of contract or case. These predefined steps provide clear guidance to users throughout the entire lifecycle, ensuring consistency and efficiency.

- Step Automation: Process steps such as "Contract Created," "Internal Review," and "External Review" are automatically defined based on the contract or case type, reducing manual setup and errors.
- Customizable Timelines: Assign start and end dates to each step, enabling precise tracking and adherence to deadlines.
- KPI Monitoring: Link milestones to Key Performance Indicators (KPIs) for actionable insights into performance and bottlenecks.
- Task and Comment Management: Attach tasks and comments to each process step for effective collaboration and transparent communication.

This structured approach simplifies complex workflows, reduces delays, and ensures all necessary actions are completed in a timely manner.





Self-Service Contracts

Carizma puts the power in your hands with a fully guided, self-service contract creation process. From NDAs to complex agreements, users can create compliant contracts in minutes – without the bottlenecks.

- Simplified Contract Creation: Generate contracts using pre-approved templates guided by a structured questionnaire.
- Automated Workflows and Risk Assessment: High-risk contracts are flagged for legal review, while low-risk contracts proceed automatically.
- Integration and Tracking: Save completed contracts and metadata in Carizma's repository with versioning and audit trails.
- Regenerate and Version Control: Use previously submitted answers in the questionnaire to regenerate contracts and create new document versions, ensuring flexibility and consistency.
- Two-Stage Contract Creation: Generate a term sheet as a low-level approach and use the term sheet data to create the final complex contract, streamlining the process while maintaining accuracy.
- Legal Oversight and Control: Ensure templates and processes remain compliant through centralized administration.

Benefits

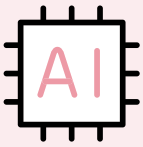
- Efficiency: Reduces the workload on the legal department by enabling self-service for routine contract types.
- Accuracy: Ensures contracts are compliant and based on the latest approved templates.
- Transparency: Provides a clear, traceable process from request to execution.
- Flexibility: Can be deployed as a standalone application or integrated with Carizma's full contract lifecycle management system.

By integrating automation, user-friendly design, and robust oversight, Carizma transforms contract creation – saving time while maintaining legal and procedural compliance.



Clause Library

- Centralized repository for reusable clauses enriched with metadata and advanced search capabilities.
- Seamless integration with MS Word for efficient insertion of clauses during drafting processes.
- Simplifies updates and ensure consistency across contracts by managing clause versions.
- Enables the creation of clauses by extracting text from existing documents and saving them with associated metadata and parameters.
- Facilitates the definition of company-wide preferred clauses, which are recommended for use whenever possible, alongside fallback clauses that can be applied if preferred clauses are not accepted by contractual partners. Categorization is managed by the legal team or relevant departments responsible for specific clauses.
- Supports the definition of “private” clauses, accessible only to the users or teams who defined them, ensuring secure and tailored use.



AI powered insights

Carizma’s cutting-edge AI capabilities are your secret weapon for smarter contract management. Unlock insights that were once buried in mountains of paperwork and take proactive steps to eliminate risks.

Here’s how AI works for you

- Extracts key metadata (party, dates, jurisdiction)
- Detects deviations from company-standard clauses
- Identifies common legal risks (e.g. missing penalty clauses) using OpenAI`s general legal model and user prompts
- Enables semantic search across various document formats (Word, PDF, emails, etc.) using AI-based content analysis

Key Features

- Metadata Extraction: Automatically identifies key information such as contract partner details, execution and expiration dates, contract type, and jurisdiction. This enables quick access to critical data across all contracts, even when stored in diverse formats and languages.
- Clause Analysis: Detects and evaluates standard clauses, such as liabilities, penalties, confidentiality obligations, and jurisdiction changes. The system can compare clauses across templates, identify deviations, and highlight frequently modified terms.
- Inconsistency Detection: Flags discrepancies in contracts, such as mismatched figures ("50 € (twenty)" instead of "fifty"), ensuring accuracy and reducing potential disputes.
- Risk Assessment: Proactively identifies compliance risks and highlights potential issues, such as missing mandatory clauses (e.g., ABAC clauses, affiliate clauses). This helps organizations adhere to legal and regulatory requirements.
- Semantic Search: Provides AI-driven natural language queries to locate relevant contracts or clauses, regardless of document format or language. Parameters can be combined for complex searches, with results displayed in an intuitive dashboard.
- Template and Clause Analytics: Analyzes templates stored in the system to identify usage trends, such as the percentage of contracts based on specific templates or frequently accepted vendor clauses. It can also suggest merging similar templates or clauses to streamline template management.
- Legacy Contract Import: Efficiently digitizes and imports paper-based or third-party contracts into Carizma, extracting metadata and creating necessary folders automatically. This supports seamless integration into existing workflows.
- Usage Insights: Tracks contract metrics, such as template adherence, average contract terms, and jurisdiction preferences. This data informs strategic decisions and enhances contract standardization.

By integrating these AI-powered insights, Carizma meets the evolving demands of modern contract management, delivering precision, compliance, and efficiency across all stages of the contract lifecycle.

Collaborative Editing with Microsoft Teams

Carizma enhances team collaboration with realtime editing features integrated into Microsoft Teams and SharePoint. Key capabilities include:

- Real-Time Collaboration: Multiple users can edit documents simultaneously, with changes instantly visible to all collaborators.
- Integrated Commenting: Inline comments and annotations streamline discussions and reviews.
- Version Tracking: Automatic versioning ensures a transparent editing process, with full change histories for conflict resolution.

This functionality is powered by Azure and Microsoft Graph API, ensuring secure and efficient document workflows. Future enhancements include detailed progress tracking and advanced monitoring tools.

The “Document Owner” manages the workflow, from document selection in Carizma to assigning internal and external collaborators. Completed edits are reintegrated into Carizma with an audit log, ensuring seamless integration and version control.





Search and Reporting

Carizma offers robust search and reporting capabilities, empowering users to quickly locate, analyze, and derive actionable insights from contract and case data.

Multi-Layered Search Options

Quick Search
Locate agreements and cases instantly by entering keywords, numbers, or phrases. Key fields include contract numbers, titles, partner names, and agreement types.

Advanced Search
Refine search results using filters like agreement type, partner details, or date ranges. Logical operators ("AND"/"OR") enable tailored queries for specific needs.

Full-Text Search
Search within document contents, including contracts and emails, for clauses, terms, or specific keywords.

Reporting with Power BI Integration

Custom Reports
Generate detailed insights, such as the number of contracts created per month or obligations nearing deadlines.

Real-Time Dashboards
Visualize key metrics, including contract statuses, types, and partner distribution, with dynamic Power BI dashboards.

Exportable Data
Export search results and reports to Excel or Power BI for deeper analysis.

Data Accessibility and Security

Integrated Data Access
Include both internal and external partner data in searches with flexible parameters like names, cities, or trade styles.

Role-Based Access
Ensure secure, compliant access to search results and reporting data, tailored to user roles such as Core Users, Info Users, or Requestors.

Enhanced User Experience

- Real-Time Results: Quickly view up to 50 search entries per query with high-performance indexing.
- Saved Queries: Save and reuse custom search queries, reducing repetitive efforts and improving efficiency.
- Actionable Insights: Monitor KPIs such as contract renewal deadlines and compliance metrics, ensuring proactive contract management.

Integration Benefits

- Streamlined Workflows: Search results and reports directly link to Carizma's contract management system for immediate action.
- AI-Enhanced Analysis: Extract metadata such as contract types, dates, and key clauses for advanced filtering and reporting.
- Customizable Dashboards: Adapt Power BI reports to organizational needs, supporting strategic decision-making.

Benefits

- Reduces time spent locating critical information.
- Improves decision-making with data-driven insights.
- Enhances transparency and compliance through detailed reporting.

Technical Highlights



Architecture
Built on ASP.NET and C#, with SQL Server for robust performance.



Integration
Interfaces for SAP, XML, and MS Office ensure seamless connectivity.



Reporting
Leverages Microsoft Reporting Services for detailed insights.



Security
Comprehensive access controls based on user roles and organizational hierarchies.



Multi-language Support
Available in German, English, and French.



With Carizma's search and reporting tools, users gain unparalleled control and visibility into their contract data, ensuring efficiency and compliance across all levels of the organization.



Ready to Transform Your Contract Management?

Schedule a personalized demo today and experience Carizma in action.

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