



App4Legal

Webex Add-on User Guide

A document that provides a description about the Webex Add-on and a walkthrough for the user to explore its interesting features

Webex Add-on

User Manual

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Overview

The Webex Add-on is an embedded app that is developed by App4Legal within the Webex app. This add-on will allow hosts to have access on their contracts during their Webex meetings and make changes on the contracts in real-time as if they are logged into the App4Legal Core app. Moreover, the host will have the capability to share the updates with the meeting participants. Thus, the meeting participants can view and edit the contracts after being granted access from the host. Nonetheless, the host will be the only one who can approve and commit the changes that are done by other meeting participants.

This real-time collaboration includes editing the contract details as well as its corresponding documents. Consequently, all meeting participants can draft, collaborate, finalize all the contract details securely including the contract itself.

Note: All meeting participants can be external users except for the host that should be an App4Legal user.

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Login

Initially, the host will login into Webex Add-on by filling his/her App4Legal credentials. Upon user authentication, the host can have access to the contracts from the add-on so that the host can grant access to the meeting participants in the call.

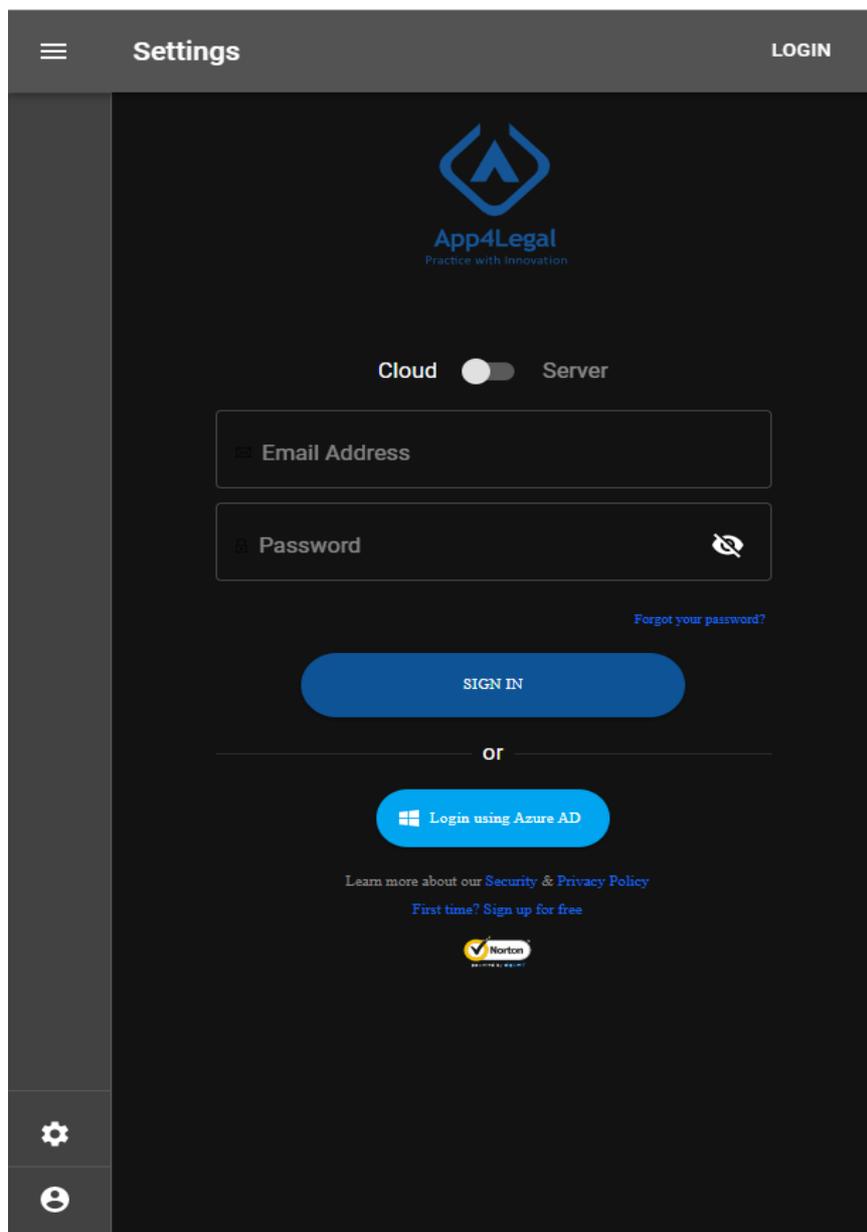


Figure 1: Login Screen

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View Recently Visited Contracts

After user login, the host will be redirected to the home page which renders a list of the recently visited contracts. This list includes about 15 contracts in which the host can navigate through this list during the meeting. Thus, the other meeting participants will also view the list of these contracts that are recently visited by the host from App4Legal Core app.

Also, the host has the capability to search either by contract Id or contract name in case the host intends to lookup for a specific contract that might not be among the recently visited ones.

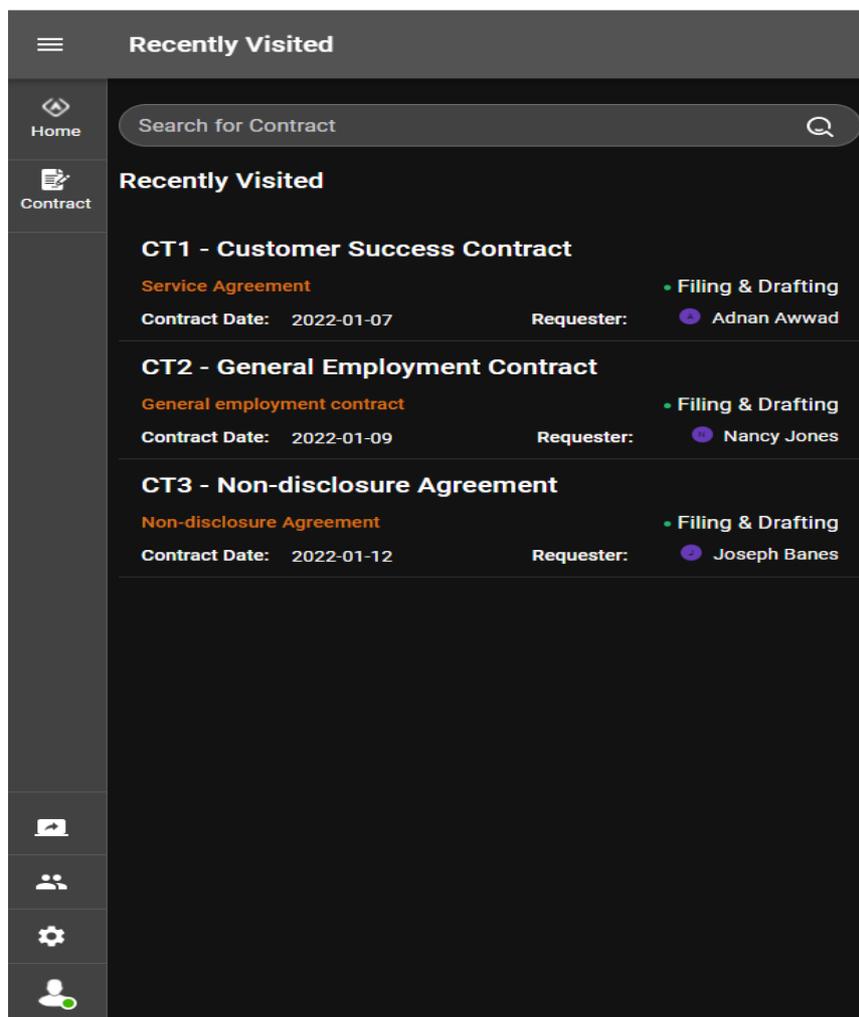


Figure 2: Recently Visited Contracts

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View Contract Details

The host can choose one of the contracts from the list in the home page by clicking on the contract that he/she intends to view its details.

The contract details will display all the details about the contract in the form of several sections in which each section contains a set of relevant fields under it.

Sections:

- Contract Details
- Parties
- Dates
- People
- Privacy
- Notes
- History
- Status Comments & Description
- Audit

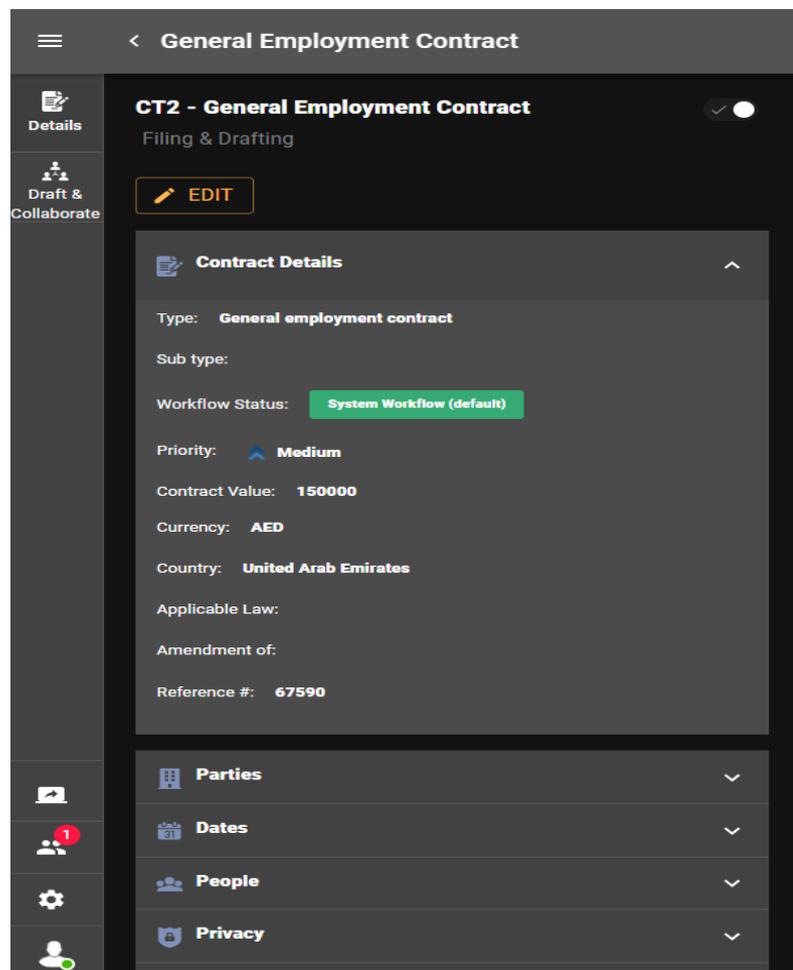


Figure 3: View Contract Details

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Edit Contract Details

The host and other meeting participants will have access to edit any field once the host changes the state of the contract details from **view-only mode** to **edit mode**. Then, each participant can make the required change and simultaneously other participants will be able to track who is making the change on a certain field within a section.

Eventually, these changes cannot be committed unless the host approves on that as he/she has the privilege to save these changes. This type of collaboration will allow all participants in the Webex meeting to track and manage all types of contracts in real-time.

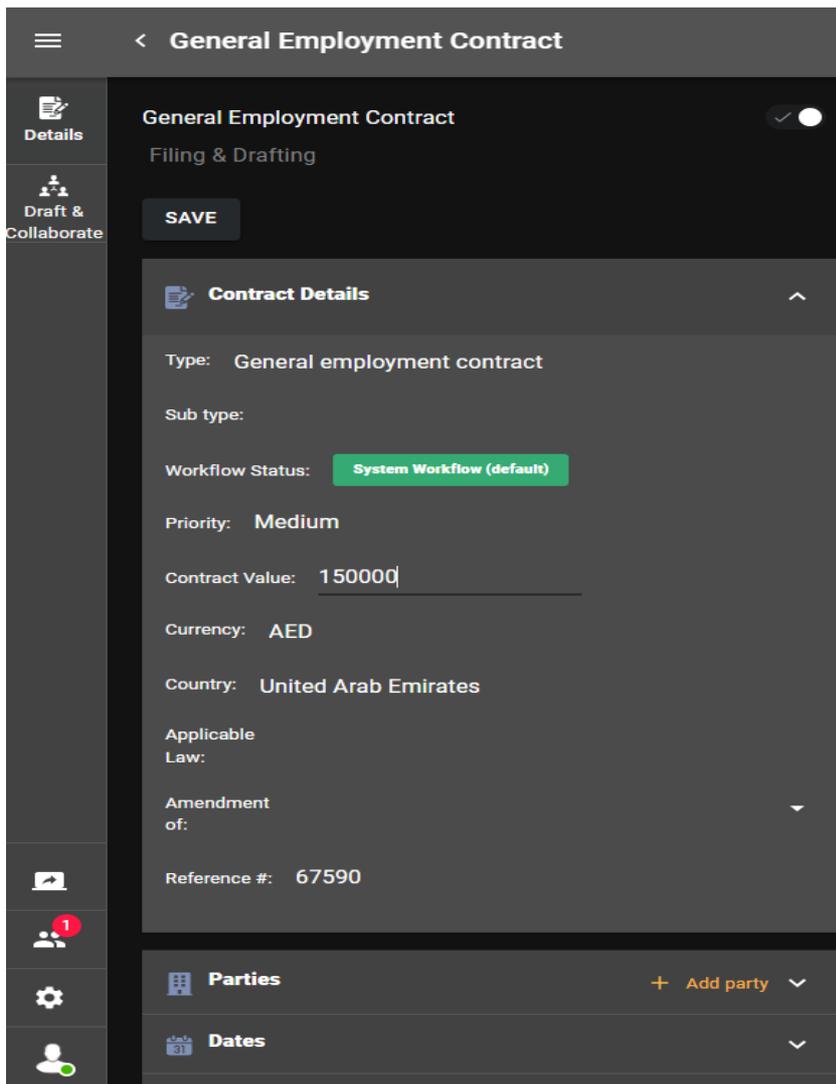


Figure 4: Edit Contract Details

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Draft & Collaborate Documents

In this section, the meeting participants can edit the contract document within real-time collaboration as the host makes the document editable in the Word Editor. Therefore, all the participants can review, make the required edits, and then finalize the document by removing or adding certain clauses to the contract.

As all the participants finalize the document, the host can submit the final version of the contract by saving the performed changes.

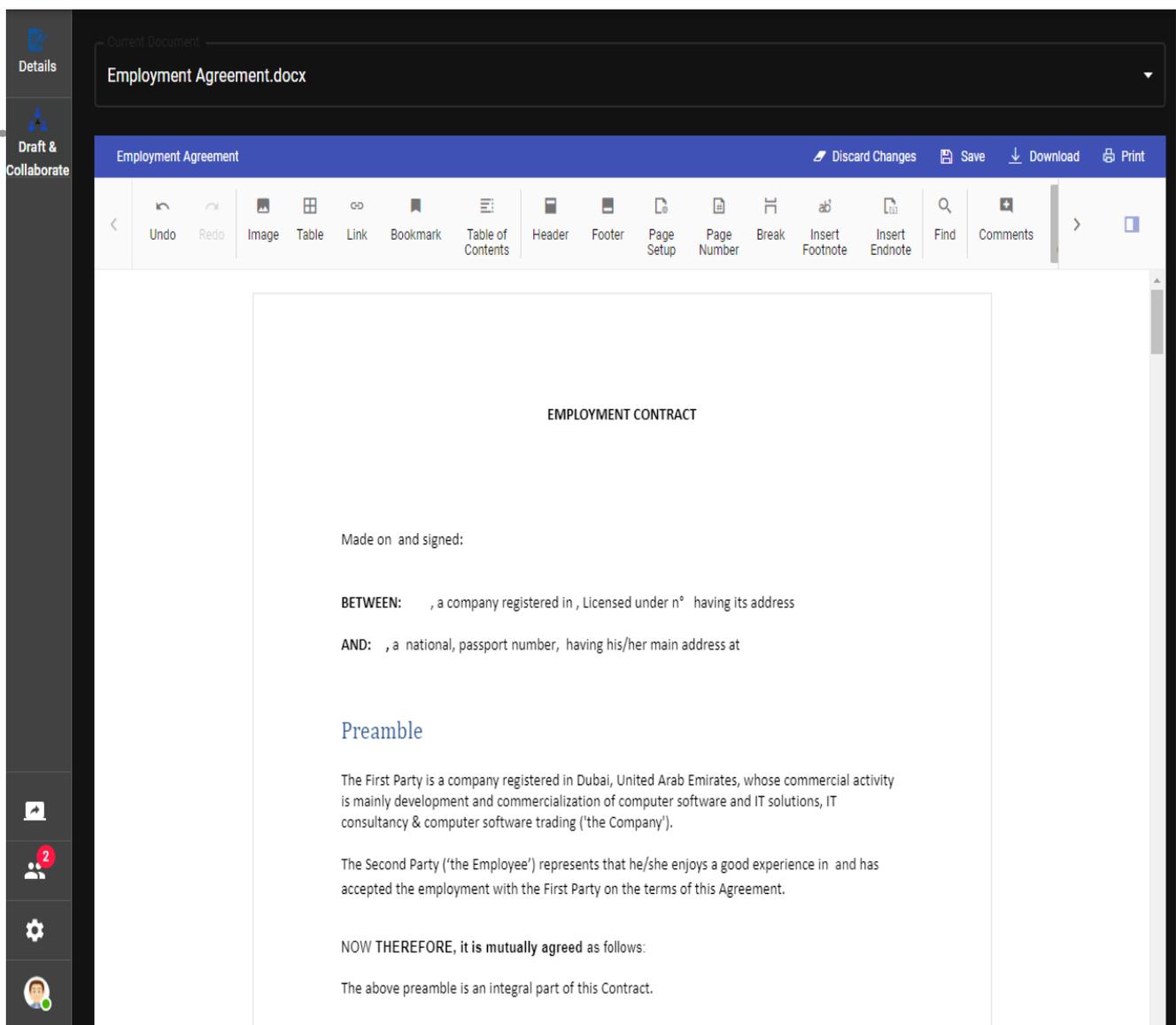


Figure 5: Draft & Collaborate Documents