

CoCounsel Release Notes: 8/2/23

Released:

“Contract policy compliance” – Redline author

In the “Contract policy compliance” feature, **you can now customize the author name in the saved redlines**. For general information on how to use this skill, please refer to this [article](#), or watch this 2.5 minute [video tutorial](#).

Here is a step-by-step walkthrough for how to use this feature:

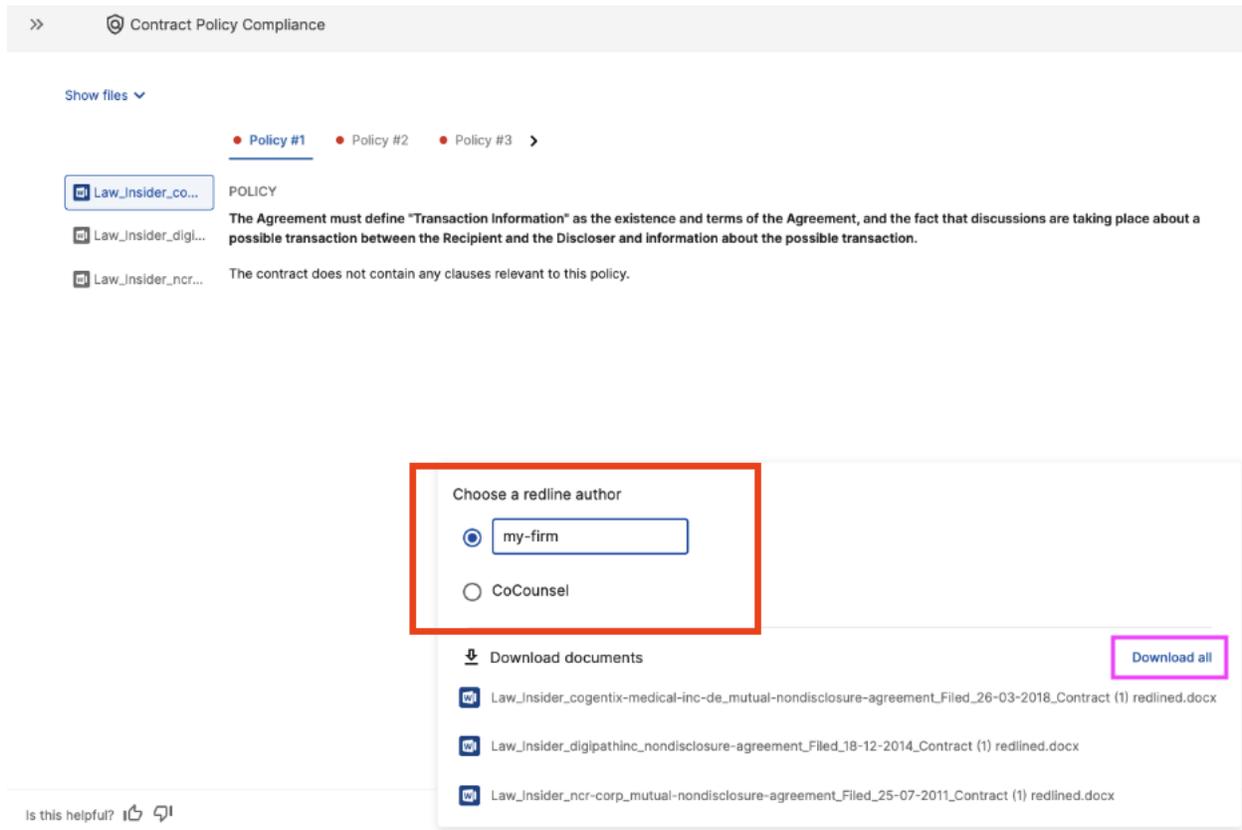
Step 1: Enter policies, click on “Download redlined docs”

After entering your document into the “Contract policy compliance” skill, and entering your policies, click on “Download Redlined Docs,” shown in the **green** box in the screenshot below. Reminder, you can only upload word documents (.docx format) to utilize the Redlining feature.

The screenshot shows the CoCounsel interface for the "Contract Policy Compliance" feature. At the top, there is a breadcrumb trail: ">> Contract Policy Compliance". Below this, there is a "Show files" dropdown menu. Underneath, there are three policy selection buttons: "Policy #1", "Policy #2", and "Policy #3", with "Policy #1" being the active selection. A list of policies is displayed below, each with a document icon and a snippet of text. The first policy is titled "POLICY" and contains the text: "The Agreement must define 'Transaction Information' as the existence and terms of the Agreement, and the fact that discussions are taking place about a possible transaction between the Recipient and the Discloser and information about the possible transaction." The second policy snippet reads: "The contract does not contain any clauses relevant to this policy." At the bottom of the interface, there is a footer area with the text "Is this helpful?" followed by feedback icons. On the right side of the footer, there are three buttons: "Download Redlined Docs" (highlighted with a green box), "Download", and "Copy".

Step 2: Choose a redline author

After clicking on “Download Redlined Docs,” a modal will appear on the bottom-right corner of the screen. You can either assign a specific person as an author, or you can assign a generic name (such as the name of your firm), or designate “CoCounsel” if you do not want to assign a specific owner. This is shown in the **red** box in the screenshot below:



Note for multi-seat SMB and ENT Users: Authored redlines will NOT be saved across your organization and will not be accessible to everyone in your organization.

Step 3: Download Redlined documents, Accept/Reject redlines with authors
 Upon clicking “Download all” (in the **pink** box in the Step 2 screenshot), you will be able to download the redlined version of your original documents. When you click on each redline in your downloaded Word document, the author will be displayed, shown in the screenshot below.

NOW THEREFORE, the parties mutually agree as follows:

1. Purpose of Agreement. The Company has agreed to disclose certain of its Confidential and Proprietary Information (as defined below, which includes Transaction Information) to the Contracting Party to evaluate, negotiate, and consummate a business relationship (the "Purpose"). Any disclosure of Confidential or Proprietary Information by the Company to the Contracting Party under this Agreement is solely for the Purpose as set forth above.

my-firm Fri 3:38 PM

Added: below, which includes Transaction Information

✓ Accept × Reject < >

Information (as defined below, which includes Transaction Information) to the Contracting Party to evaluate, negotiate, and consummate a business relationship (the "Purpose"). Any disclosure of Confidential or Proprietary Information by the Company to the Contracting Party under this Agreement is solely for the Purpose as set forth above.