

EverCommerce Contracts Policy

12/29/2023 9:45 am EST

Basic Rules

1. No Oral Agreements: All agreements that bind the Company to any obligation must be in writing.
2. Redact Credit Card/Personal Information: Redact full credit card numbers, bank account information, and any personally identifying information from each contract before storing the contract in any Company system.

Legal Department Review

In general, most contracts will require Legal review.

Email legal@evercommerce.com for legal review of any document that requires a signature or acceptance of online clickthrough terms that is:

- Not our approved template;
- Our template with changes (other than pricing or quantity); or
- Over \$250,000 in annual value (whether or not our template).

Approvals and Signature Authority

1. Ensure all signature blocks are complete
2. Only people identified in the Approval & Signature Authority Policy can sign contracts for us. If you're not sure who should sign, please email legal@evercommerce.com.
3. For the Approval & Signature Authority Policy, click [EverCommerce Approval and Signature Policy](#)

Storing Signed Contracts / Naming Convention

After a contract is signed by both parties, confirm that any credit card, bank accounts, or personally identifying information have been redacted and save the signed document(s) with the following naming convention:

[Our Name] - [Their Name] - [Document Name] - [Date]

e.g. EverCommerce - Customer XYZ - Software License Agreement - 9.1.2022

Send contracts to signedcontracts@evercommerce.com. This may be done manually or you can set up automatic emailing functionality in DocuSign, Salesforce, or another system you use.

Other policies: Refer to the Company's separate policies on EverHub regarding:

- Procurement
- Expense Reimbursement