

CSM Contract Retrieval and Documentation Process

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Purpose

This process explains how the CSM team should locate, verify, and use contract documents when working on customer records, including OAFs, SOWs, executed agreements, and related supporting files.

When to Use This Process

Use this process whenever you need to confirm:

- the master agreement for a customer
- the executed contract or OAF
- an SOW or supporting exhibit
- the effective date, activated date, or go-live date
- add-ons or amendments to a master contract
- invoice details tied to an OTF or contract record

Systems to Check

Start in Salesforce and use the customer's opportunity record. If the document is not there, check the available alternate storage sources in this order:

1. Salesforce
2. [SharePoint](#)
3. [LinkSquares](#)
 - If you don't have access to LinkSquares enter a Jira ticket.

Step-by-Step Process

1) Open Salesforce

- Search for the customer in Salesforce.
- Go to the opportunity record.
- Confirm which platform the customer is on.

2) Identify the Platform

Determine the correct platform before searching documents. Common platforms include:

- SO = SedonaOffice
- Manitou
- MG = Managely
- AB = AlarmBiller

- SIMS
- Stages

3) Find the Master Agreement

- Look for the master contract in Salesforce first.
- If available, open the opportunity and review:
 - Files
 - Quote
 - Details
 - Files
- Download or review the PDF version of the contract if present.

4) Check for Supporting Documents

If the master agreement is not found in Salesforce:

- check SharePoint
- check LinkSquares
 - if needed, request access

5) Review the Contract Package

Look for these document types:

- **OAF:** Order Acknowledgement Form
- **SOW:** Statement of Work
- **Exhibits:** Supporting documents attached to the OAF or contract
- **Amendments:** Add-ons or changes to the master agreement

Document Definitions

OAF

- OAF stands for **Order Acknowledgement Form**
- It is treated as the **quote** and the **executed contract**
- An executed OAF means it is signed by both parties

Executed Contract

- A contract is executed when both parties have signed it

Effective Date

- The effective date is usually the date signed by the customer
- In some older contracts, the effective date may be the customer's sign date or the listed go-live date

Activated Date

- The activated date is the customer's signed date

OAF Old Contract Structure

- Older OAFs may include T&Cs listed as additional terms and conditions
- Older contracts may also reference:
 - SUA
 - Software Use Agreement
- This is where the legacy T&Cs were located

OAF New Contract Structure

- New OAFs use the **MSA**
- The MSA is the legal link
- There may also be additional terms and conditions
- If additional terms exist, they supersede the matching sections in the legal link

Exhibit

- An exhibit is any supporting document that lives with the OAF or master agreement

SOW

- SOW stands for **Statement of Work**
- It may appear at the bottom of the OAF
- It may also exist as a separate PDF

Add-Ons

- Add-ons are treated as amendments
- An amendment is an addition to the master contract

Invoice Review

If contract details are still unclear:

- review invoices to help identify the correct agreement
- look specifically for the invoice tied to the OTF
- use the invoice to confirm contract references, dates, or platform details if needed

Final Check

Before closing the record, confirm:

- correct customer platform
- correct master agreement
- whether the document is an OAF, SOW, exhibit, or amendment
- signed date, effective date, and activated date if applicable
- whether the contract is old structure or new MSA structure

Summary

The CSM team should always start in Salesforce, verify the platform, locate the master agreement, and then confirm supporting documents and key dates. If the document is not available in Salesforce, move to SharePoint or LinkSquares.
