meta 365

HUSTLING EFFORTLESSLY

Introduction

pEntities is a Microsoft Teams application designed to unify document and communication workflows by integrating multiple Microsoft 365 services and AI capabilities. The app enables users to interact with documents and emails across various repositories, including:

- **Microsoft OneDrive**
- **Microsoft Teams Document Libraries**
- **SharePoint Online Document Libraries**
- **Microsoft Outlook (emails and attachments)**

Users can select and process content from these sources to perform advanced operations such as:

- Feeding document or email content into an **embedded AI agent** for summarization, content generation, or contextual analysis.
- Triggering task creation workflows based on **metadata-driven actions** (e.g., document classification, tagging, or status changes).
- Executing AI-powered operations within **logical containers** (referred to as *buckets*), which isolate data sources to ensure contextual relevance and data governance.

Each bucket hosts its own instance of the AI agent, which operates exclusively on the content within that bucket. This design ensures that AI outputs—such as summaries, generated documents, or insights—are scoped to the selected data set, maintaining both relevance and compliance.

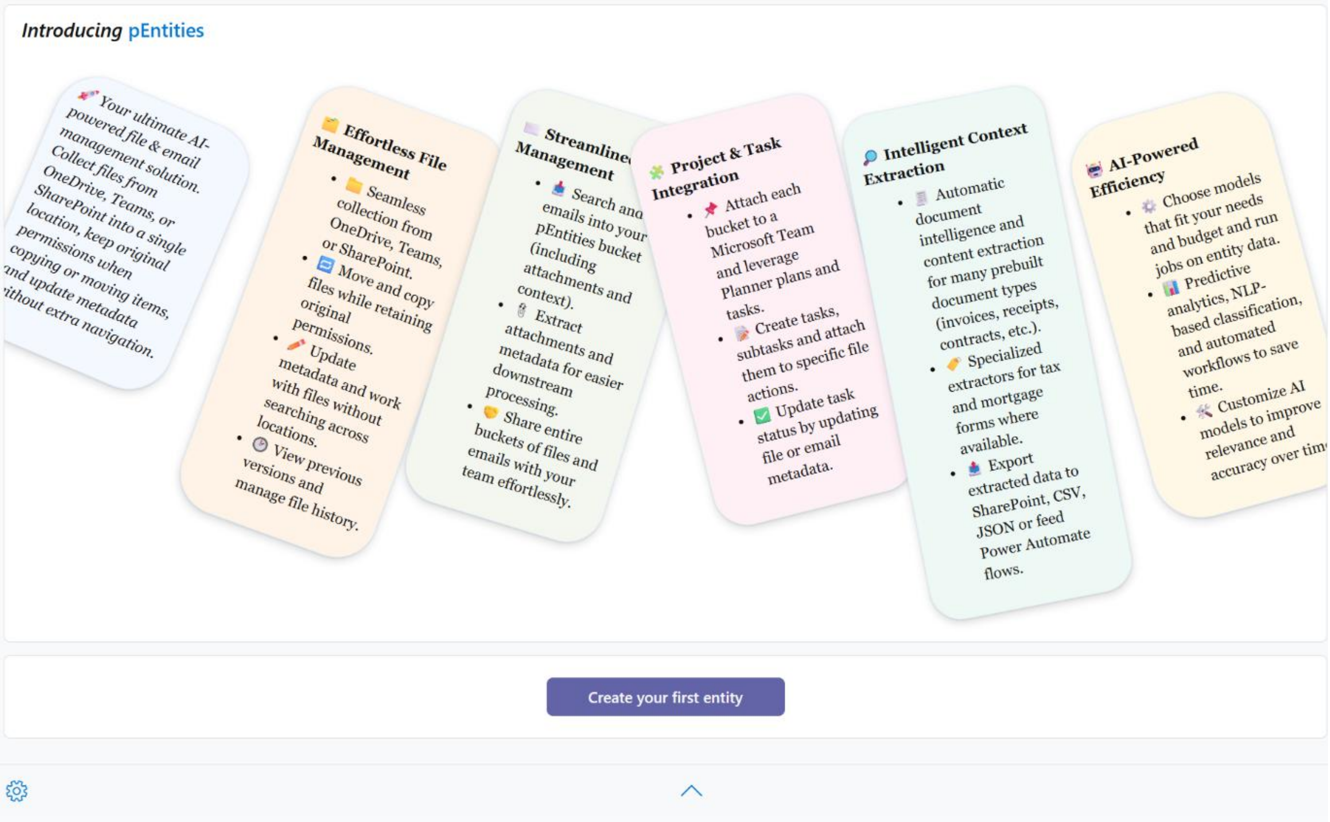
pEntities leverages Microsoft Graph APIs, adaptive cards, and Teams extensibility features to deliver a seamless user experience across document management, task automation, and AI interaction.

Summarizing the different features are the following

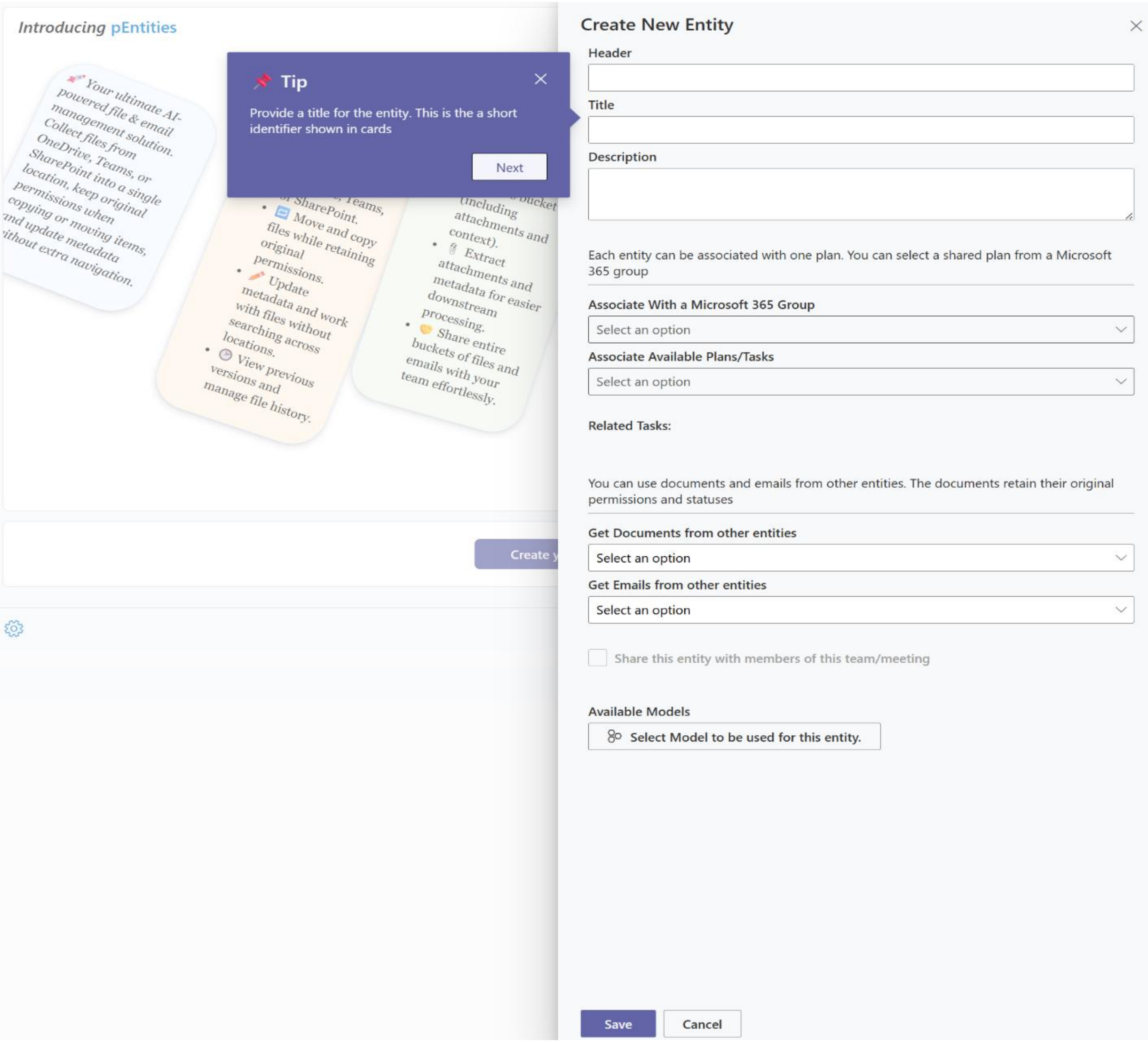
- **File and Emails management.**
    - Users can collect files from different repositories including OneDrive, teams or SharePoint into one place. U
    - sing pEntities copying and moving files is easy.
    - The files retain their original permissions without moving on different locations.
    - From pEntities users can update metadata and work with files without the need to traverse to different location neither to search for the files.
    - Users can see previous versions and work with files.
    - Users can search for emails and save them into the bucket in order to use either the email context or the attachments
    - Saving email files can benefit from the metadata of storing
    - Sharing is easy. Users can share the entire bucket of files and emails directly with other users of the team or the company
- **Project Management**
    - Every bucket is attached to one Microsoft 365 Group. The same way can benefit from the planner Plans and tasks. With the ability to connect each entity in a specific plan the users can benefit of the planner directly within the pEntities.
    - Create tasks and subtasks
    - Attach tasks to specific files actions such as changing a metadata field or leaving comments to a file.
    - Users can assign tasks to specific users or change the process of a task simply by updating the file or email metadata
- **Context Extraction**
    - During the process of inserting files or email attachments into pEntities users can benefit from document intelligence and select the automatic extraction of document content.
    - Currently a great variety of different kind of documents exists as prebuild options such as Invoices, Receipts, Contracts, Credit Cards and more specialized such as US Personal Tax forms , US mortgages forms and many more.
    - During the extraction process can select the extracted content to feel fields on SharePoint or feed specialized power automation flows or just extract in csv or json files.
- **AI Agents**
    - Users during the creation of new pEntities bucket can select their model depending on their needs and cost. Currently there is a variety of different models targeting generic or more specialized enterprises.
    - Users can feed their models with the data of each entity only and the model can create different jobs according to their needs

Creating the First Entity

The first time you are connecting to pEntities you have this display.



Press the button Create Your first Entity to create your first bucket.



For each new entity you must fill the following fields

1. Header

- **Definition**: A JSON configuration file that defines the entity's structure and metadata.
- **Location**: Stored in the user's OneDrive.
- **Contents**: Includes all relevant bucket definitions, data source URLs, and unique identifiers required for entity operations.

2. Title

- **Purpose**: The display name of the entity.
- **Usage**: Shown on UI components such as cards and bucket detail views.

3. Description

- **Importance**: Critical for defining the operational logic of the entity.
- **Function**: Serves as a semantic blueprint for the bucket's behavior.
- **Integration**: Utilized by the OpenAI service to generate task-specific instructions for automated agents.

4. Microsoft 365 Group Association

- **Control**: Dropdown selector to bind the entity to an existing Microsoft 365 Group.
- **Benefits**: Enables access to Planner plans and other group-scoped resources

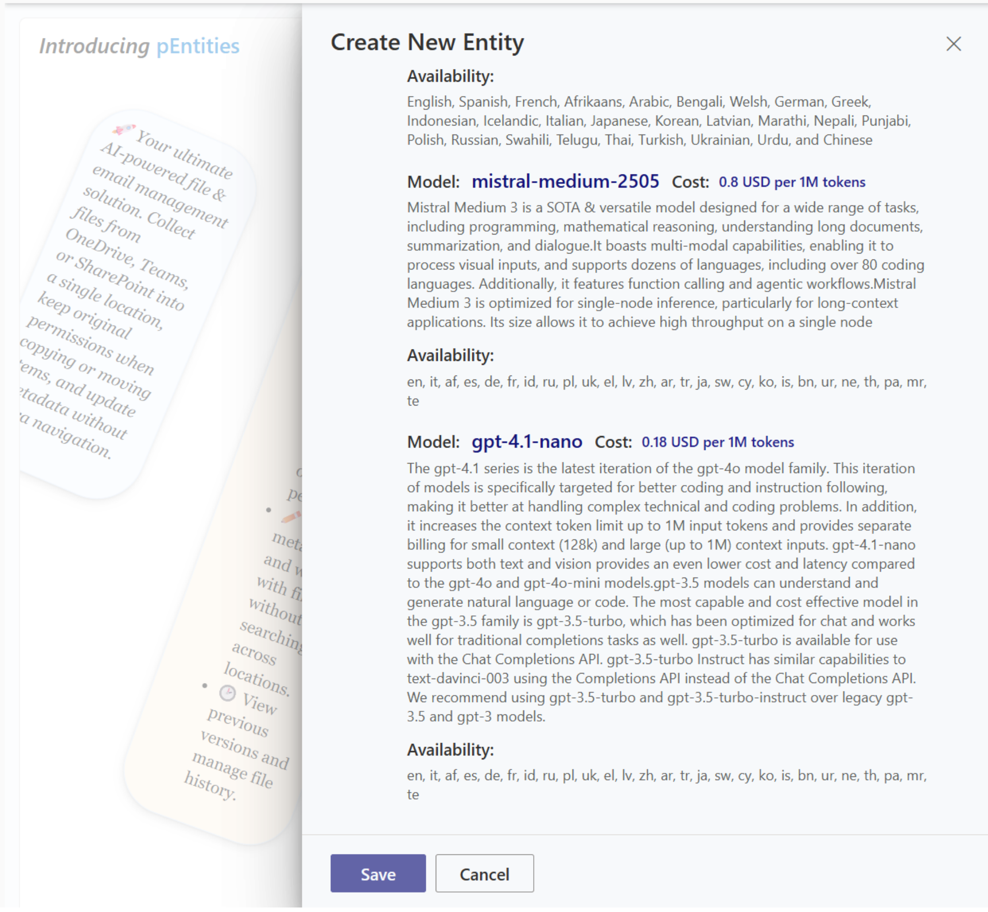
5. Document Inheritance(Optional)

- **Functionality**: Allows the entity to inherit documents from another existing entity.
- **Use Case**: Facilitates reuse and centralization of file resources across entities.

6. Email Inheritance(Optional)

- **Functionality**: Enables the entity to access and utilize emails associated with another entity.
- **Use Case**: Supports cross-entity communication and context sharing.

7. Use the available AI models button to open and select the available models.



Model Selection Interface

On this page, the user is required to select the AI model to be used for task execution. The following logic applies:

1. Model Selection

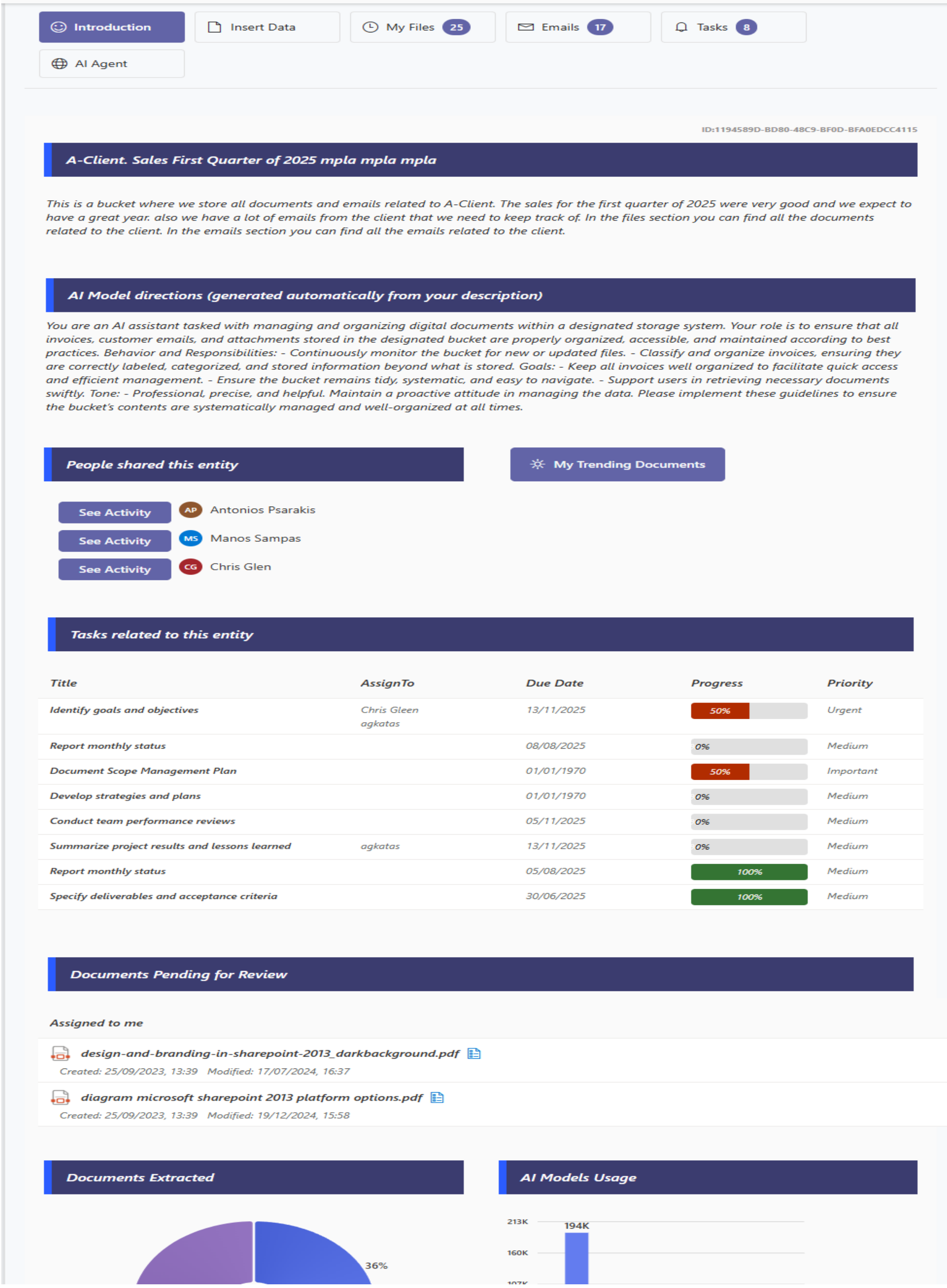
- **Availability**: Currently, three models are available for selection. Additional models will be introduced in future updates.
- **Purpose**: The selected model determines the behaviour and capabilities of the agent performing the tasks.

2. Payment Options

- **Dependency**: Payment options are dynamically linked to the selected model.
- **Future Integration**: These options will be defined and managed through the SaaS subscription plans associated with the application.
- **Behaviour**: Upon model selection, the UI will adapt to display the corresponding payment tiers once the SaaS plans are implemented.

Entity Main Page Overview

Upon user interaction with the **Details** button associated with a specific entity, the system transitions to display the **Main Menu** and the **Main Page** of the selected entity. This page serves as a centralized interface for accessing metadata, collaborative context, AI-enhanced descriptions, and usage analytics related to the entity.



The Main page contains the following sections:

- **Entity Title**
    - Displays the name of the entity as defined by the user.
- **User-Provided Description**
    - A free-text field populated by the user to describe the purpose or content of the entity.
- **AI-Enhanced Description**
    - This section contains a refined version of the user-provided description, generated by OpenAI. The enhanced description improves semantic clarity and precision and is utilized as contextual input for all subsequent AI model actions involving this entity.
- **Shared Users**
    - Lists all individuals with whom the entity has been shared. Typically, this includes members of Microsoft Teams groups selected by the entity owner.
    - Hover Interaction: When hovering over a listed user, the interface displays a preview of the most recently updated files contributed by that user.
- **My Trending Documents**
    - Activates a panel displaying documents identified as trending via Microsoft Graph REST API.
    - Selection Behaviour: When the user selects one or more documents, references to these documents are inserted into the current entity.
    - **Storage Note**: The original documents are not moved or duplicated; only metadata references are created. These referenced files become accessible via the **My Files** menu.
- **Tasks Related to This Entity**
    - Displays a read-only table of tasks associated with the selected Microsoft Planner plan.
    - **Restriction**: Tasks are non-editable within this view. Users must navigate to the **Tasks** menu or use Planner directly to modify task data.
- **Documents Pending for Review**
    - Lists documents submitted by other users for review by the current user.
    - **Review Workflow**: The user may update document status or add comments as part of the review process.
- **Documents Extracted**
    - A graphical representation showing the volume and types of documents extracted across all entities owned by the user.
    - **Billing Relevance**: Extraction metrics are used to calculate usage-based charges according to the user's selected subscription plan.
- **AI Models Usage**
    - Displays a graph detailing token consumption per AI model selected by the user.
    - **Billing Relevance**: Token usage is tracked for billing purposes in accordance with the user's selected subscription plan

Insert Data

Users can populate entities with content using multiple integration pathways. These methods leverage Microsoft 365 services to ensure seamless access and reference to existing organizational data.

OneDrive for Business

- Users can browse and select files stored in their personal or shared OneDrive folders.
- Selected files are referenced within the entity without duplication or relocation.

Microsoft Teams

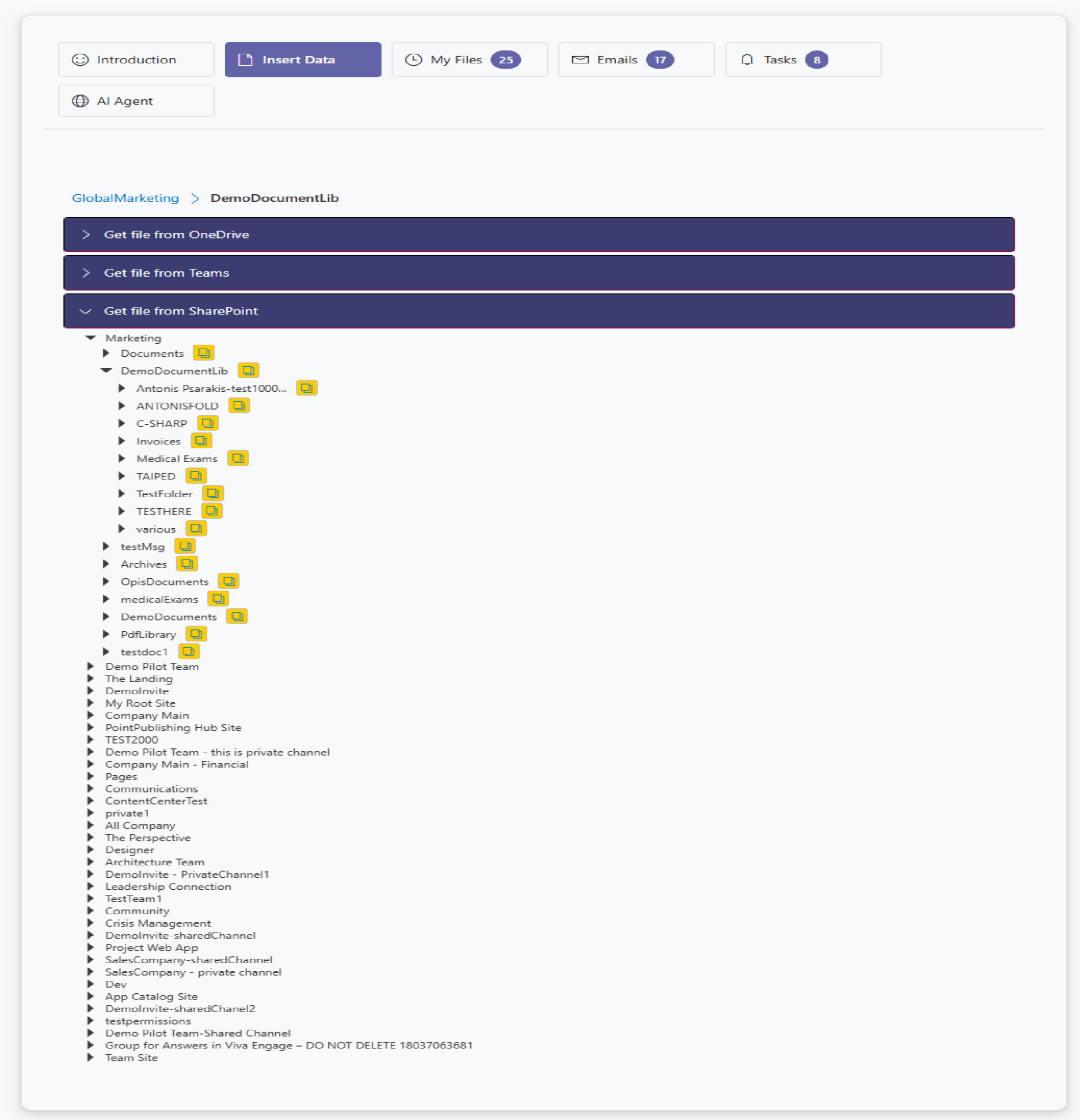
- Files from Teams channels where the user has access rights can be selected.
- This includes files stored in the underlying SharePoint site associated with each Team.

SharePoint Online

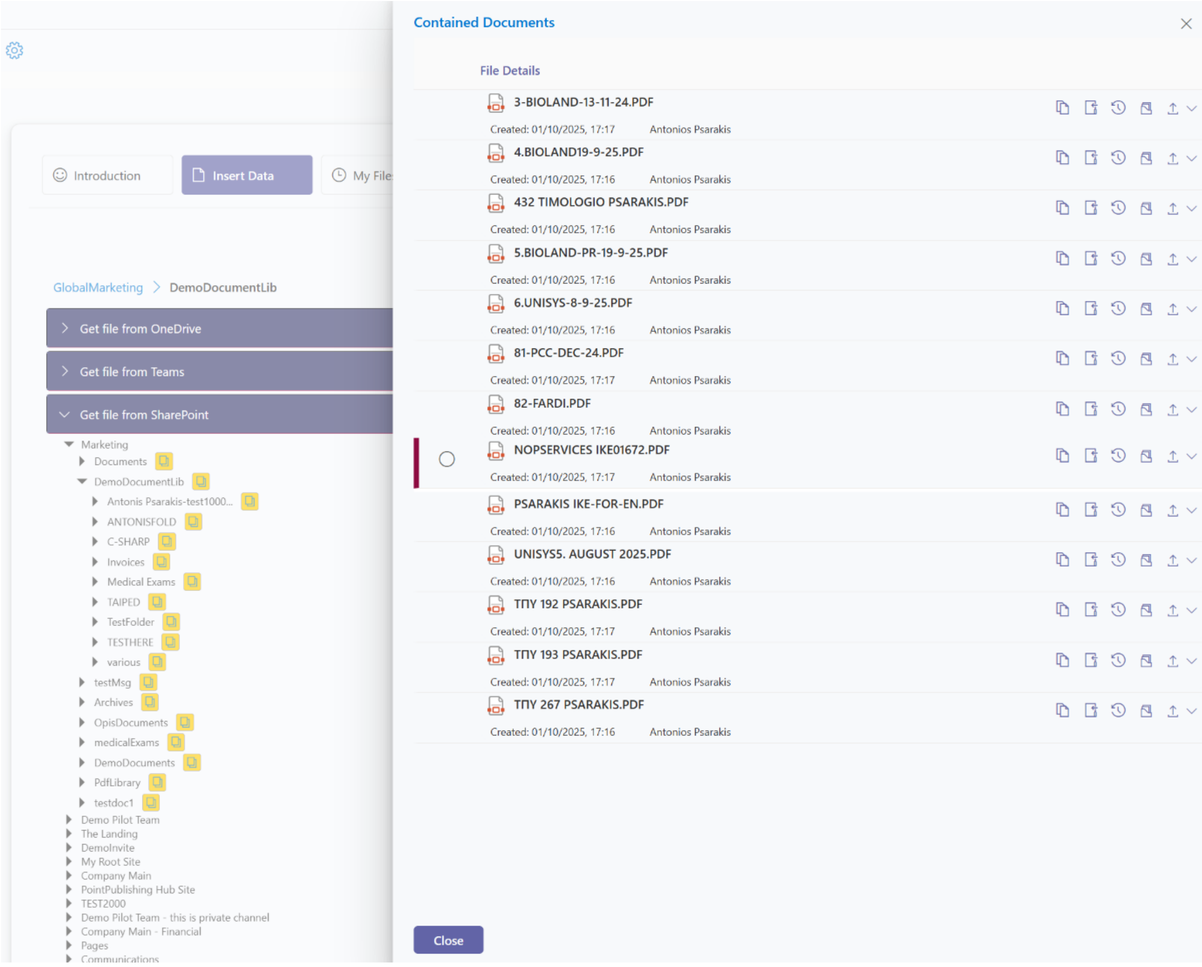
- Users can navigate and select files from SharePoint sites they have access to.
- This includes both communication sites and team sites.

Local files though AI Agent

- Users Can Drag and Drop files directly from the AI Agent interface and then asks from then AI Agent to copy them to the desired SharePoint location.



Users can effortlessly browse through SharePoint Online and Microsoft Teams sites to locate and insert files directly into entities. This feature offers a streamlined and user-friendly interface, enabling structured access to organizational content. Once the desired folder is identified, users simply click the highlighted yellow icon to proceed, which opens a dedicated page for file selection and insertion.



Comprehensive Document Interaction Interface

Within the dedicated document view page, users gain full visibility into all files contained in the selected folder. Each document is accompanied by a set of powerful actions, accessible via intuitive icons positioned on the right-hand side:

- **Copy File**
  Enables users to duplicate the selected file to a different location within OneDrive, Microsoft Teams, or SharePoint. *(Detailed functionality is covered in a separate section.)*
- **File Versions**
  Displays the complete version history of the document, allowing users to view, compare, and restore previous iterations. *(Detailed functionality is covered in a separate section.)*
- **Manage File**
  Opens a metadata panel presenting all available file attributes, supporting better classification and governance. *(Detailed functionality is covered in a separate section.)*
- **Extract Data**
  Leverages predefined templates to perform precise and structured content extraction

from supported document types. *(Detailed functionality is covered in a separate section.)*

Currently supported extraction templates include:

- Invoices
- Receipts
- Identity Documents
- Credit Cards
- Contract Documents
- U.S. Personal Tax Documents
- General Documents

This feature set empowers users to manage, analyze, and repurpose content with confidence, while offering decision-makers a scalable solution for document intelligence across Microsoft 365.

My Files

By selecting the **My Files** menu option, users can work directly with content stored in pEntities without altering its original location. This non-invasive approach ensures that all files remain exactly where they are—whether in OneDrive, Microsoft Teams, or SharePoint—preserving their native permissions, metadata, and organizational settings.

This design guarantees full compliance with existing governance policies while offering users a seamless and secure way to interact with their documents.

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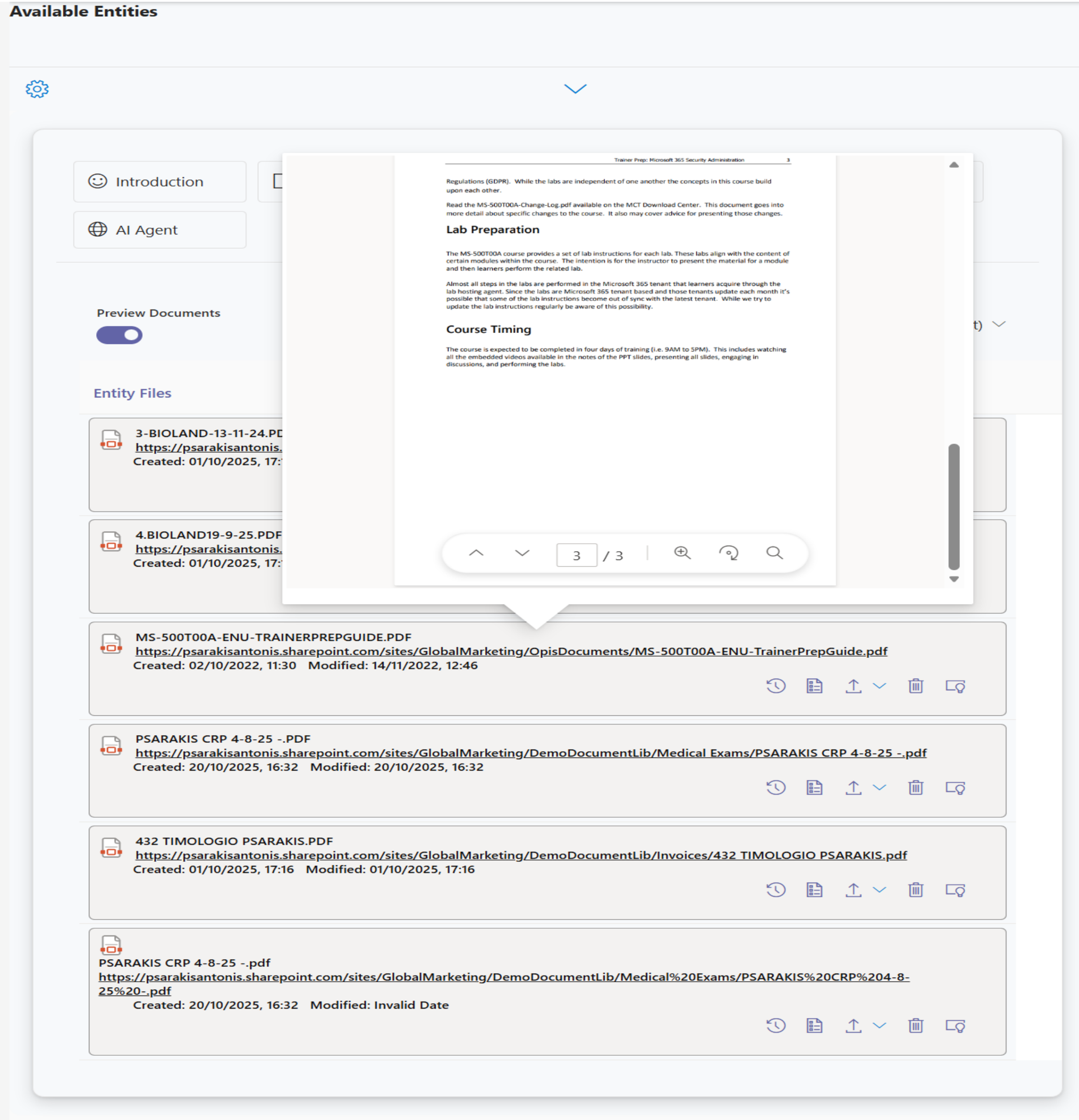
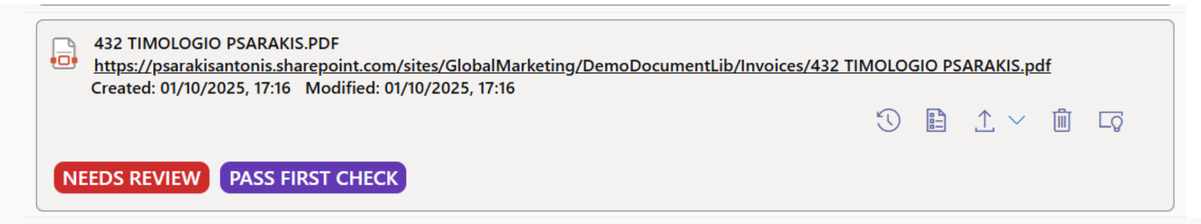
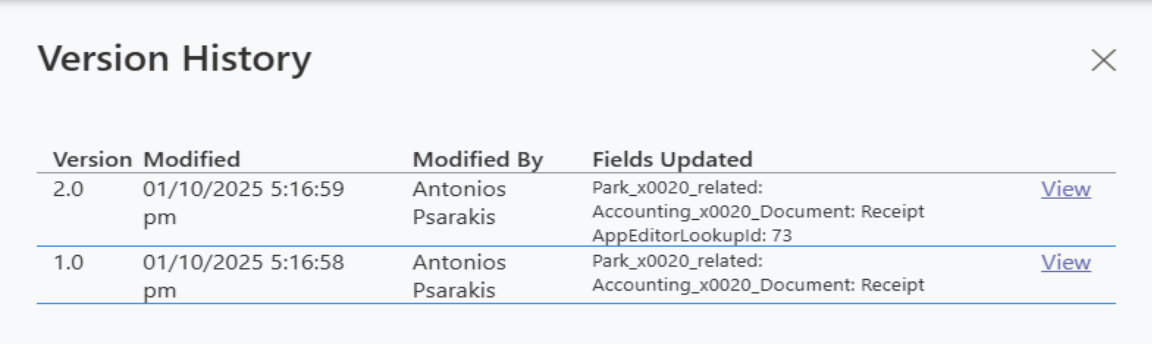


In this page the user has the following options.

Preview Documents. Use this option to preview and work with the specified document. (Not available on Teams for Desktop).



File Versions. Displays the version history of the file. Users can view, select, and restore previous versions. (details covered in a separate section).



Version History

Version	Modified	Modified By	Fields Updated	
2.0	01/10/2025 5:16:59 pm	Antonios Psarakis	Park_x0020_related: Accounting_x0020_Document: Receipt AppEditorLookupId: 73	View
1.0	01/10/2025 5:16:58 pm	Antonios Psarakis	Park_x0020_related: Accounting_x0020_Document: Receipt	View

Note. Use the view link to see the previous version.

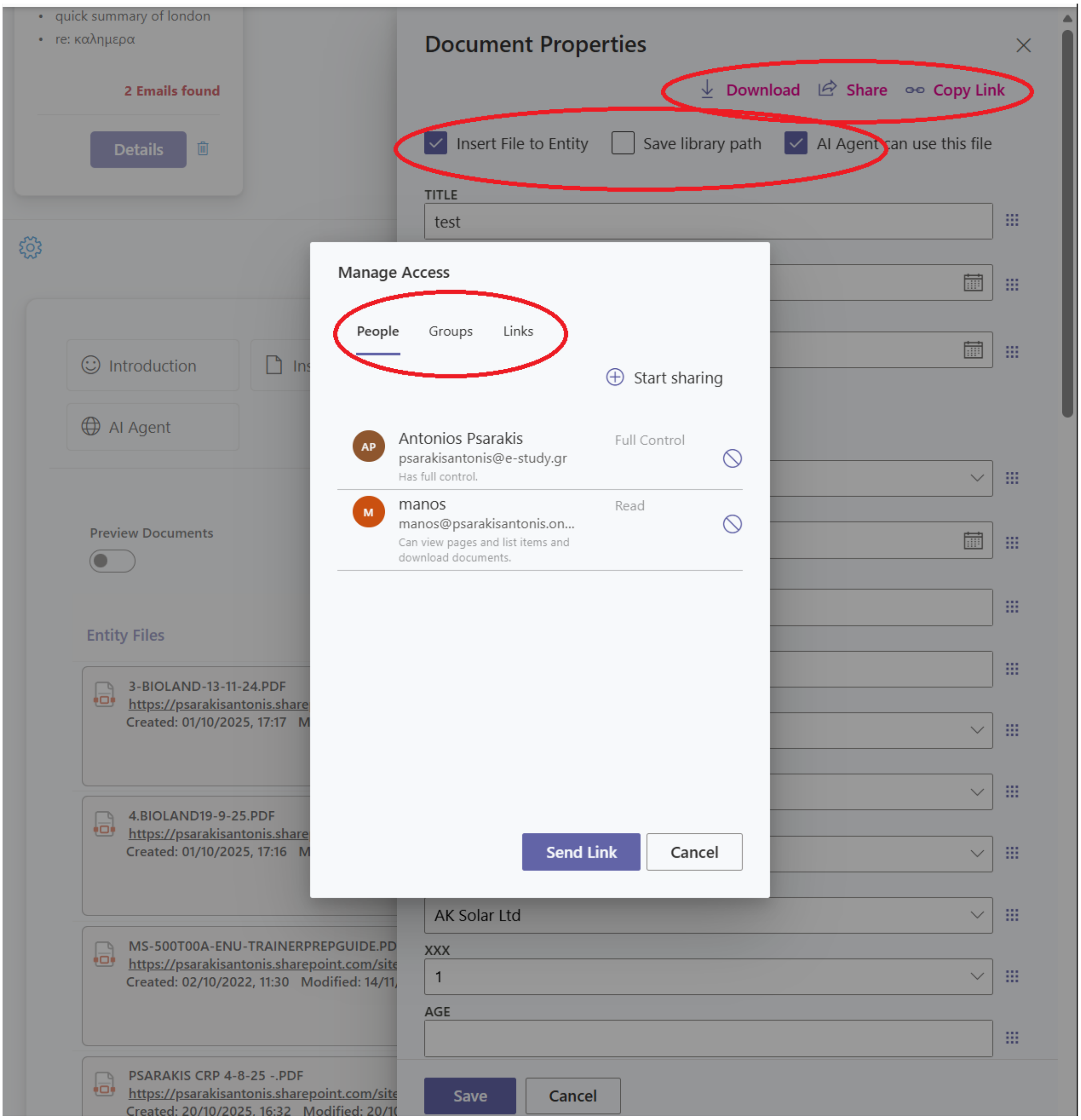
***Manage File.** Opens a panel showing all available metadata for the file (details covered in a separate section).

***Extract data.** Uses predefined file templates to perform accurate and structured content extraction (details covered in a separate section).

Remove From Entity. This action only removes file from the entity. Do not actually deletes the file.

Put A Hint. Users can mark this file for special purposes.

Manage a File



Advanced File Management Within pEntities

Managing files directly within pEntities unlocks a suite of advanced capabilities designed to enhance control, collaboration, and automation:

Full Metadata Editing
Users can update all metadata fields, including term sets and user pickers, ensuring accurate classification and alignment with organizational standards.

Permission Insights & Control
Users can view and, where permitted, modify file-level permissions to maintain secure and appropriate access.

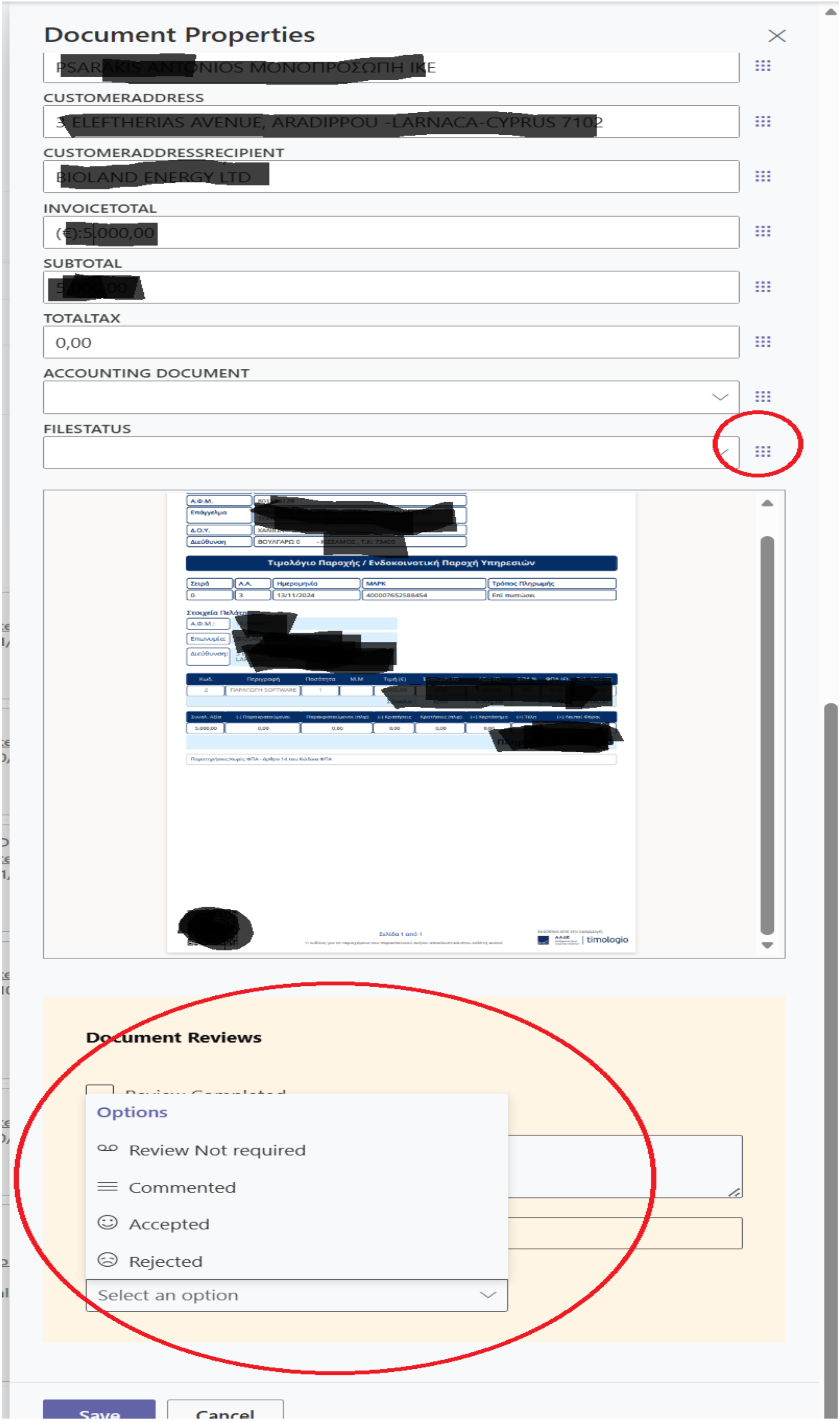
Sharable Link Creation
Generate and copy secure sharing links for internal or external collaboration, subject to user permissions.

File Download
Download files directly from the interface, respecting existing access rights and governance policies.

Bind Rules Panel Access
By clicking the icon next to any metadata field, users can open the Bind Rules Panel to define custom workflows triggered by specific actions on the file—enabling automation and process consistency.

Document Review & Collaboration
Within the review area, users can comment on documents and initiate review cycles. These actions can also trigger predefined workflows, streamlining feedback and approval processes.

Inline File Preview & Direct Access
A live preview of the document is displayed beneath the metadata section, allowing users to interact with the file directly from within the pEntities interface.



Document Properties
[redacted]
CUSTOMERADDRESS
[redacted]
CUSTOMERADDRESSRECIPIENT
[redacted]
INVOICETOTAL
[redacted]
SUBTOTAL
[redacted]
TOTALTAX
0,00
ACCOUNTING DOCUMENT
FILESTATUS
Τιμολόγιο Παροχής / Ενδοκοινοτική Παροχή Υπηρεσιών
timologio
Document Reviews
Review Completed
Options
Review Not required
Commented
Accepted
Rejected
Select an option
Save
Cancel

- **Use the icon button next** to the field to open the Bind Rules Panel. There the user can create workflows that can happen when specific actions happen on the selected file.
- In the document reviews area, **the user can comment the file** and the same time can send the document for new comment or review. This actions can also trigger specific workflows.
- Under all the metadata a preview of the file appears. Form there the user can select the file to work directly with it.

Extract Data

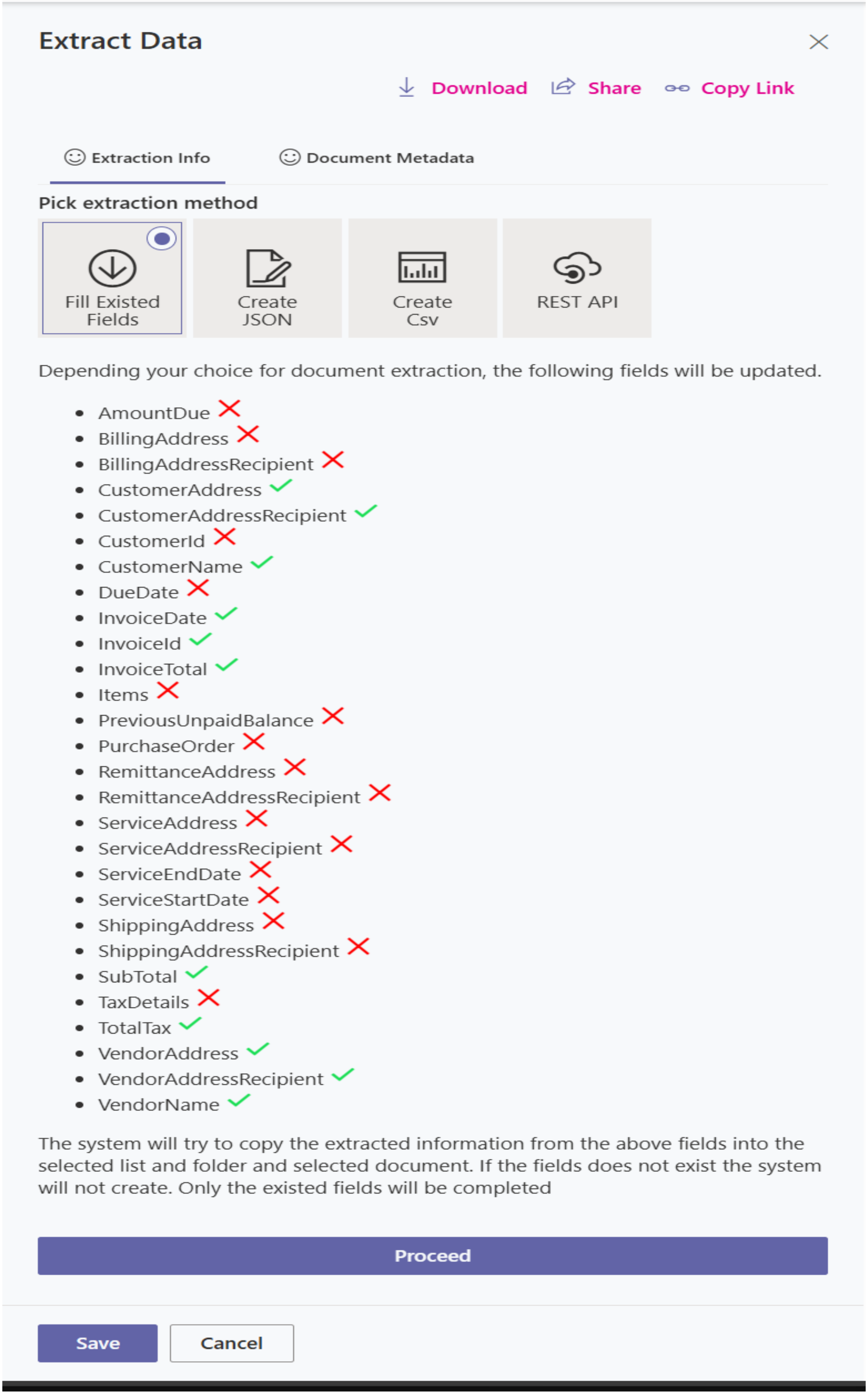
Through the **Insert Data** or **My Files** menu options, users can initiate structured data extraction using predefined templates tailored to specific document types. Upon selecting a template, a dynamic panel opens, analyzing the selected library to verify the presence of required fields within the document.

This interface provides immediate feedback, highlighting any missing fields and ensuring transparency before extraction begins. Each template is designed to target specific data points, enabling accurate and efficient content capture while maintaining consistency across organizational workflows

Also the user has the following options what to do with the extracted data.

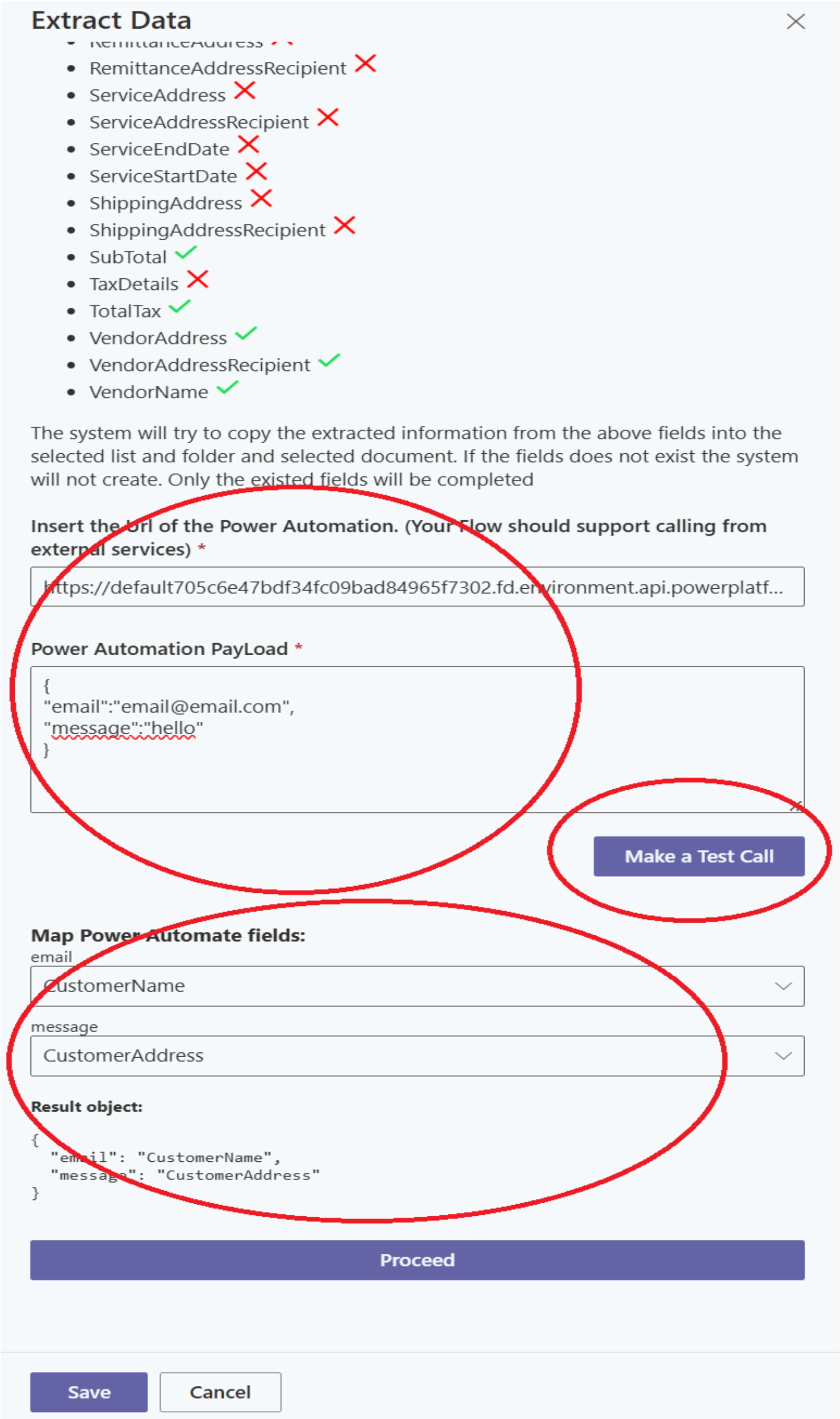
1. **Fill** the fields of the selected file in its document library.
2. **Extract** the data in a separate Json file
3. **Extract** the data in a separate Csv file
4. **Send** the data to a power Automation Flow

Press the Proceed Button to complete the extraction cycle. If the user has selected the first default option will see the extracted data in the appropriate fields. **Remember to click save button to save the data to document library**


Extract Data
Download
Share
Copy Link
Extraction Info
Document Metadata
Pick extraction method
Fill Existed Fields
Create JSON
Create Csv
REST API
Depending your choice for document extraction, the following fields will be updated.
AmountDue ✗
BillingAddress ✗
BillingAddressRecipient ✗
CustomerAddress ✓
CustomerAddressRecipient ✓
CustomerId ✗
CustomerName ✓
DueDate ✗
InvoiceDate ✓
InvoiceId ✓
InvoiceTotal ✓
Items ✗
PreviousUnpaidBalance ✗
PurchaseOrder ✗
RemittanceAddress ✗
RemittanceAddressRecipient ✗
ServiceAddress ✗
ServiceAddressRecipient ✗
ServiceEndDate ✗
ServiceStartDate ✗
ShippingAddress ✗
ShippingAddressRecipient ✗
SubTotal ✓
TaxDetails ✗
TotalTax ✓
VendorAddress ✓
VendorAddressRecipient ✓
VendorName ✓
The system will try to copy the extracted information from the above fields into the selected list and folder and selected document. If the fields does not exist the system will not create. Only the existed fields will be completed
Proceed
Save
Cancel

Connect a power automation flow.

It's very easy to connect your power automation flows in the extraction phase.

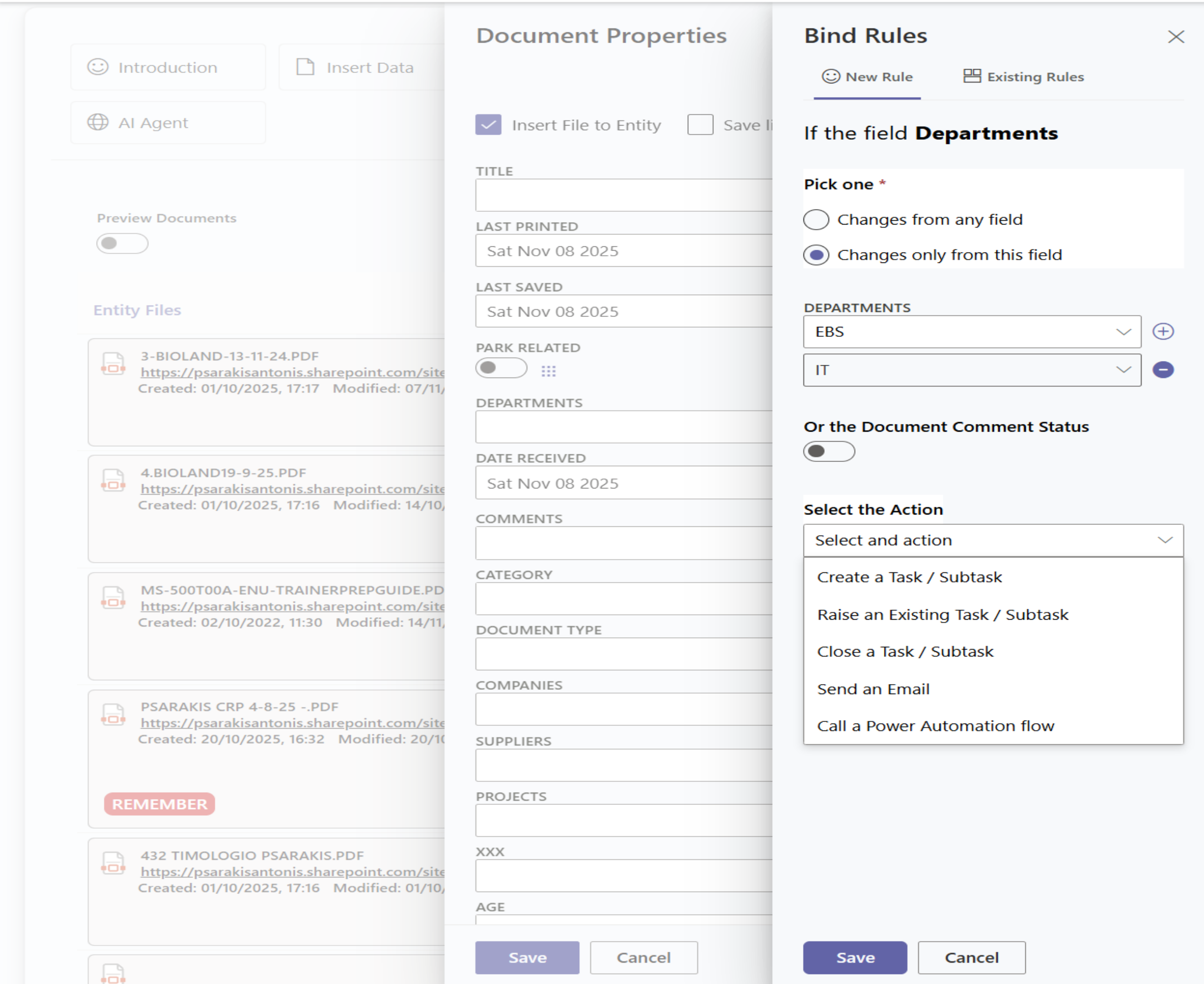


After you select REST API the users must complete the following area **to use their own power automation flows.**

- Power Automation URL textbox.   Copy the URL of the flow
- Power Automation Json Payload textbox. **Use a typical Json payload that the flow already uses.**
- Map the fields combo boxes. As soon as the user put the Json payload appear the appropriate drop-down boxes where the user can bind the extracted data to the fields, he/she wants.
- Make a text call. Optional make a text call to see if the power automation flow is available and reachable from the pEntities App.

Bind Rules

For each document in **pEntities**, users can define **bind rules** to trigger actions based on metadata or comments.



Trigger Options.

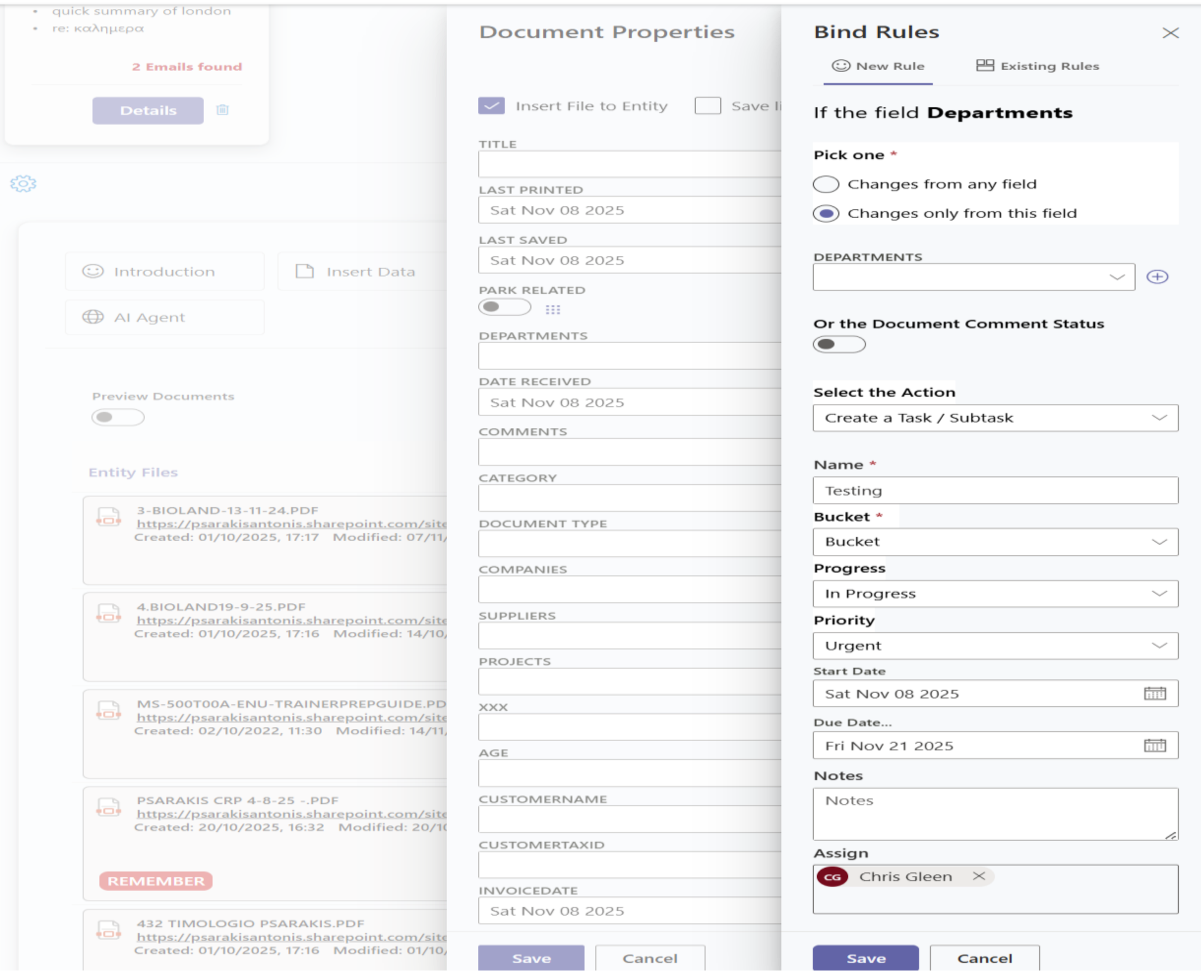
- **Specific Field Change**. Trigger an action when a defined metadata field is modified.
- **Any Field Change**. Trigger an action when any metadata field is updated.
- **Marked Comment.** Trigger an action when a user comment includes a specific marker or tag.

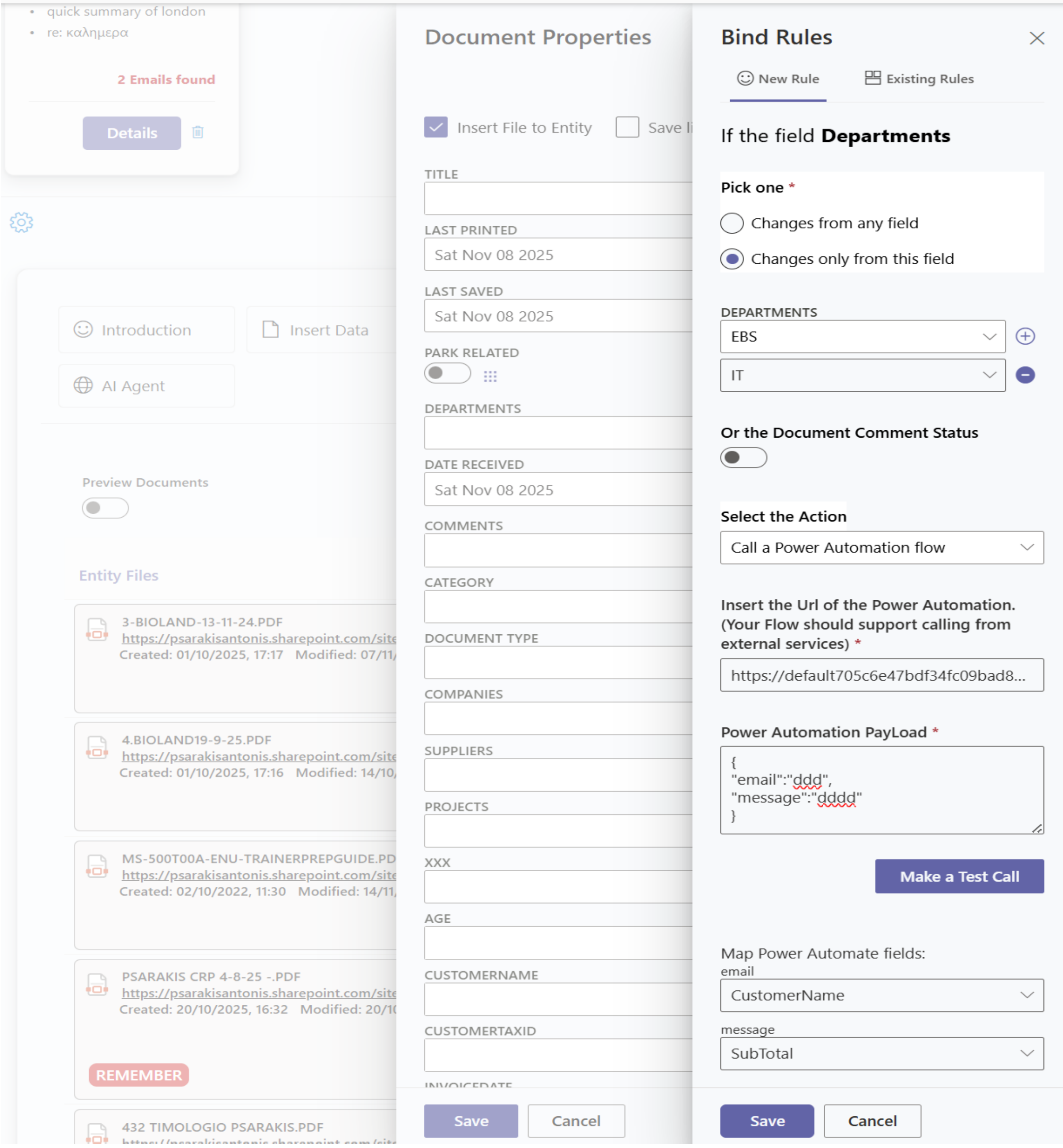
Use Cases.

- Automate workflows (e.g., notify reviewers, update statuses).
- Integrate with external systems via webhooks or Power Automate.
- Maintain audit trails

Available Actions are

- Create a new Planner Task
- Raise an existing Planner Task
- Close an existing Planner Task
- Send a notification email
- Call a Power Automation Flow





Emails

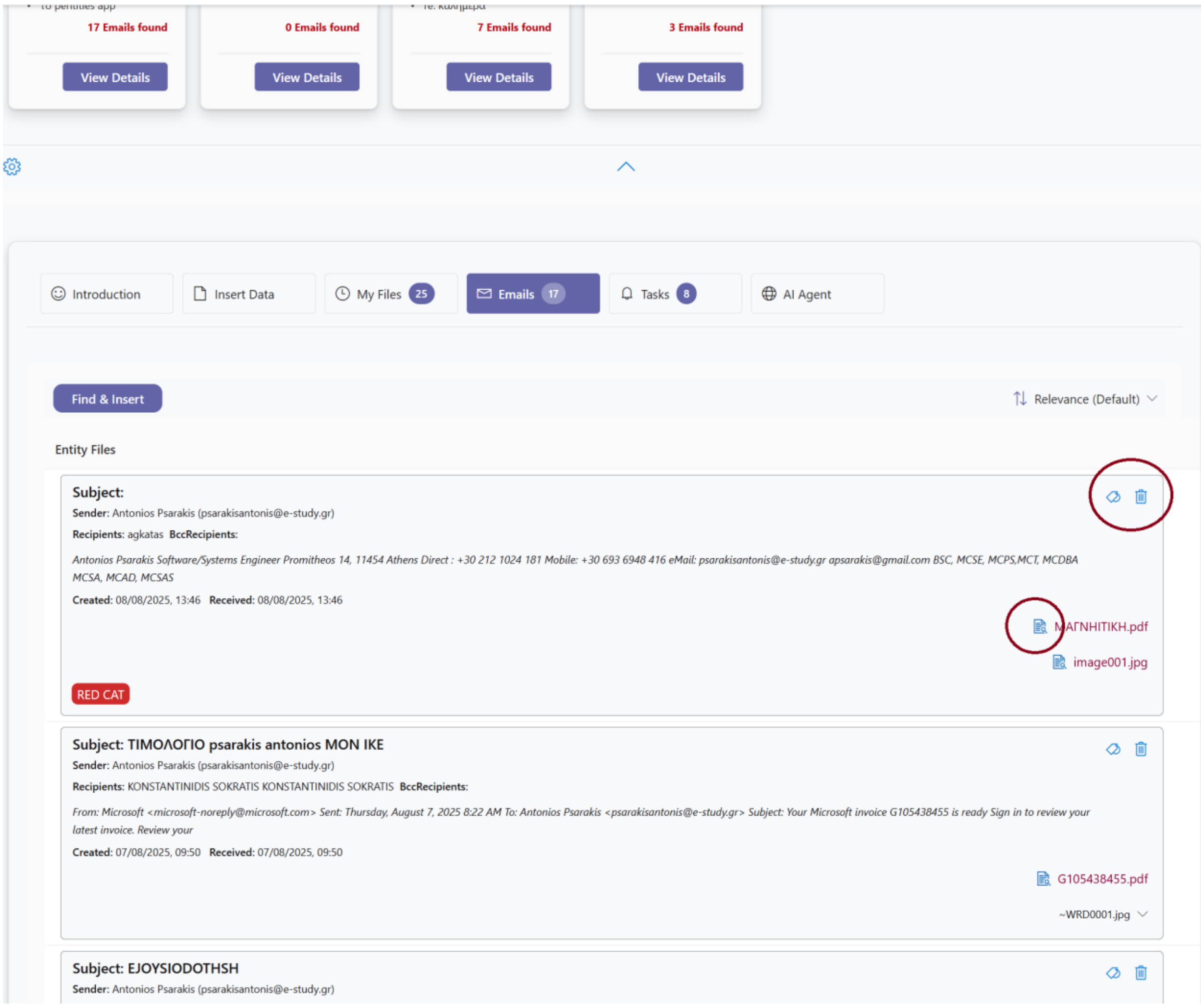
Through the **Emails** menu, users can import emails and their attachments directly into an entity, enabling centralized access to relevant communications and supporting documentation. On the main interface, alongside the list of already selected emails, users can utilize the **Find and Insert** button to browse their mailbox and insert additional messages as needed.

This functionality streamlines the process of associating email content with business entities, enhancing traceability, collaboration, and document intelligence—all while maintaining the integrity of the original email data.

Key features.

Email Grouping: Organize and manage important emails within the entity context.

AI Input: Use email content as input for AI models associated with the entity.



Attachment Handling:

- Save attachments to specific folders in **Teams, OneDrive** or **SharePoint**.
- Extract content from attachments using predefined templates (as described in the data extraction section).

Tasks

Through the **Tasks** menu, users can seamlessly manage the Microsoft Planner plan linked to each entity. This integration allows tasks to be directly associated with the operational lifecycle of a file, supporting structured workflows and enhancing team coordination.

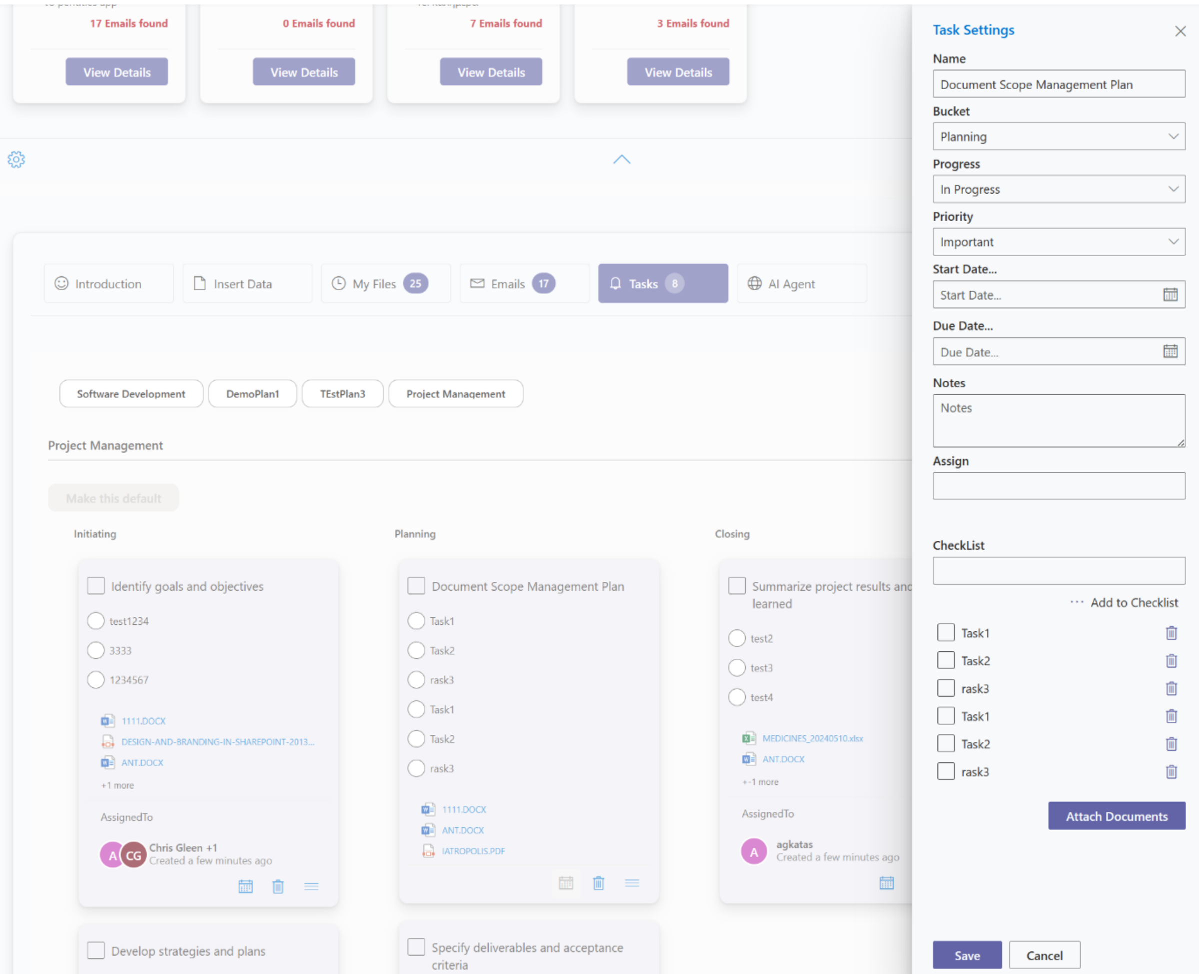
By aligning tasks with specific document functions, users gain a contextual view of responsibilities, deadlines, and progress—empowering both individuals and teams to stay organized and focused within the pEntities environment.

Key Features

- **Plan Creation**: Create new Planner plans directly from the entity.
- **Task Management**:
    - Add new tasks
    - Assign tasks to users
    - Modify task details (e.g., due dates, priority, labels)
- **Plan Association.** Users can always change the default Plan with another

Real-Time Sync

All changes are synced directly with Microsoft Planner. Updates made here are immediately reflected in the Planner interface and vice versa.



Users can designate a **default Planner Plan** for each entity.

- **Make This Default**: Clicking this button sets the selected plan as the default for the entity.
- **Purpose**: A default plan is required to enable task-related actions in the **Bind Rules** section.

Users can associate existing documents within the entity to specific tasks or rules.

- Enables tighter integration between documents and task workflows.
- Supports automation and traceability when used with bind rules and AI actions.

Users can create update or assign new and existing tasks from this section, the Planner interface **or asks from the AI agent to do it for them.**

AI Agent

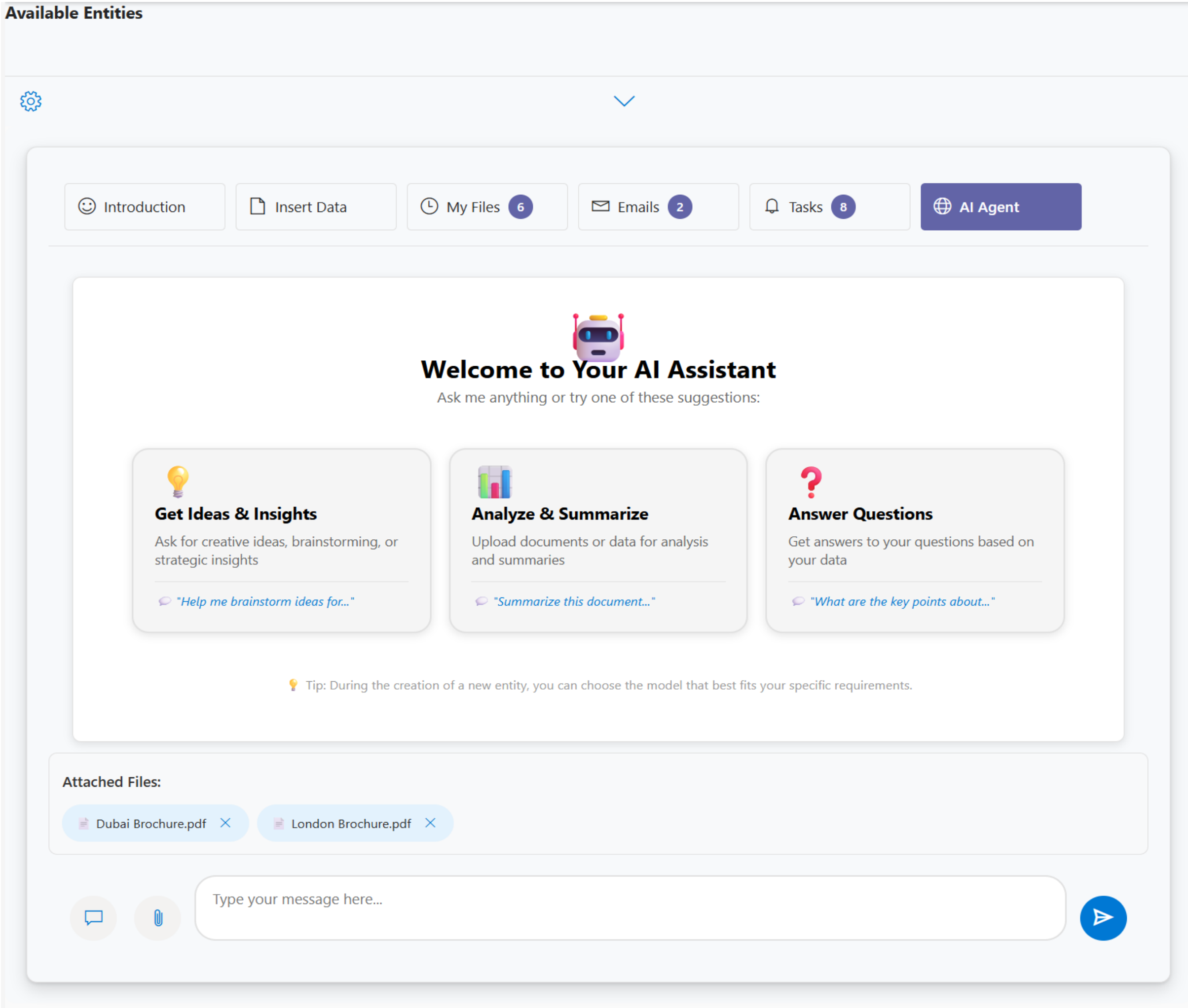
Each entity (bucket) can be linked to a specific **AI model**, giving it unique behaviour and processing capabilities.

Key Features

- **Model Selection**: Users can choose from currently supported models (3 available; more coming soon).
- **Custom Behaviour**: The AI agent's behaviour adapts based on:
    - The selected model
    - The entity's enhanced description

Use Cases

- Tailor AI responses to different content types (e.g., legal, technical, creative).
- Optimize extraction, summarization, or classification tasks per entity.



Here's a concise and technically accurate description of the **AI Agent Actions** supported within each entity

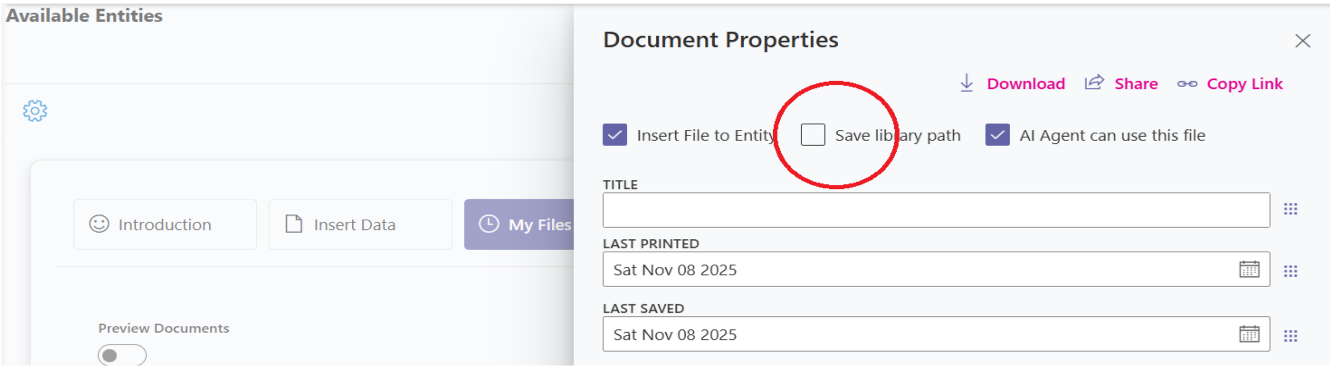
Each AI Agent, based on the selected model and entity context, can perform the following actions:

- **Search Emails**
  Query the user's mailbox using defined filters (e.g., sender, subject, date).
- **Summarize Emails**
  Generate concise summaries of selected email threads or individual messages.
- **Send Emails**
  Compose and send emails on behalf of the user, based on context or instructions.
- **Summarize Documents**
  Extract key points and generate summaries from documents within the entity.

- **Upload & Save Documents**
  Upload files and store them in designated SharePoint document libraries.
- **Create & Assign Tasks**
  Generate new tasks or Planner plans and assign them to users.
- **Use Entity Knowledge Base**
  Access and reason over all documents marked as available or extracted for AI use.

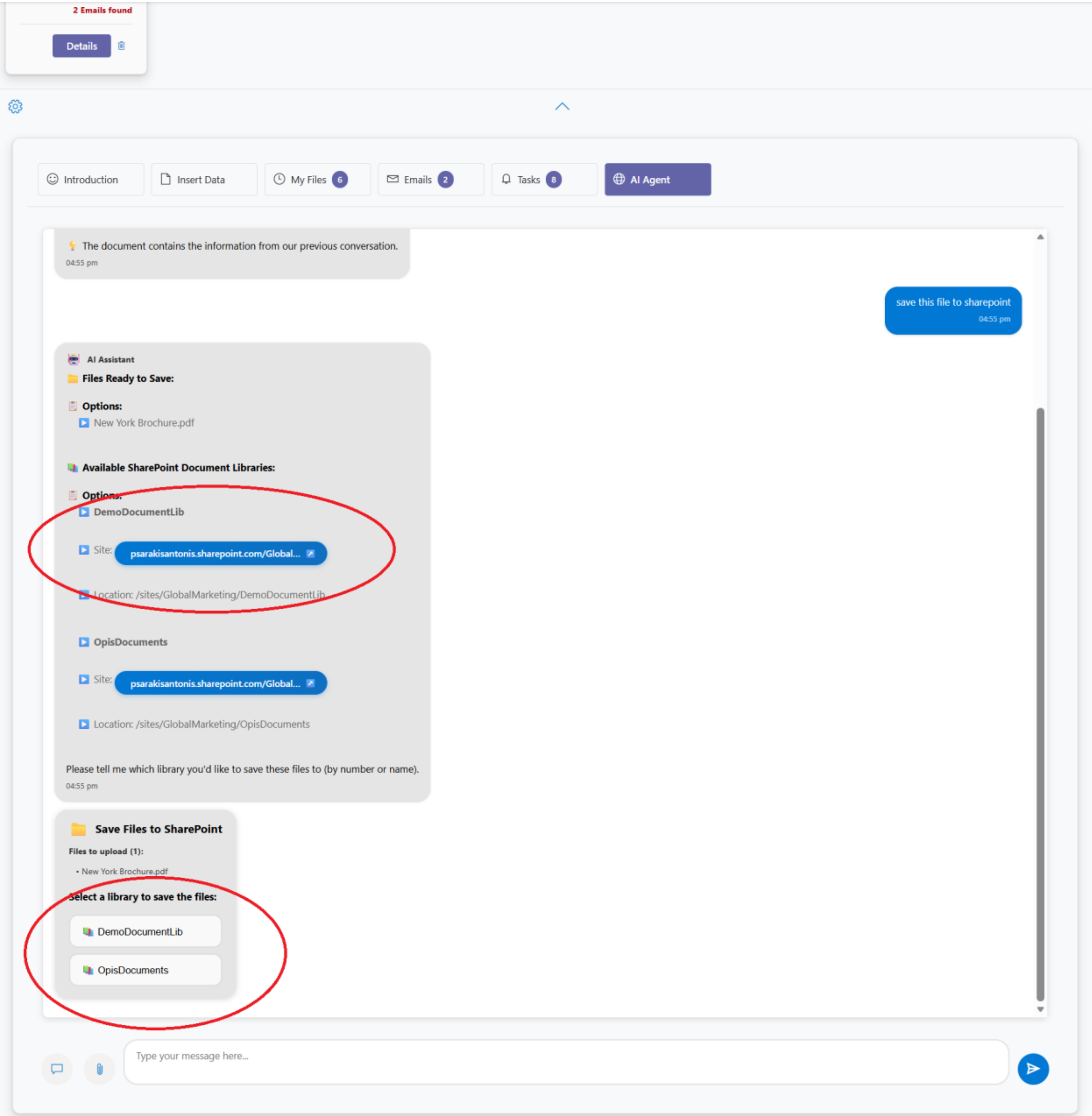
Important.

- In order the Ai Agent to save documents in SharePoint **its necessary the user first the have define available document libraries**. This Can happen using the specified check box in document properties panel.



- When users attach documents in the **AI Conversation** area:
  - **Default Upload Location**: Files are automatically uploaded to the user's OneDrive.
  - Save to SharePoint:
    - Users can instruct the AI Agent to "Save this file to SharePoint".

If multiple default document libraries are configured, the AI Agent will prompt the user to select the target library.



Templates

pEntities offers three pre build templates for the most common needs of an enterprise. In each of these templates we have collected the most common functions of specific activities.

HR Template

The **pEntities HR Template** is a ready-to-use digital workspace designed to include every core HR process inside Microsoft 365. It brings together employee documents, communications, approvals into one modern and collaborative environment, eliminating the fragmentation HR teams face across Outlook, SharePoint, Teams, and OneDrive.

Built for HR departments of any size, the template provides a structured and intelligent system that enhances compliance, accelerates onboarding, and reduces administrative workload by centralizing all employee-related information.

Key Benefits.

1. **Centralized Employee Records**. All employee documents—contracts, IDs, certifications, resumes, policies, and more—are organized in a single controlled environment. HR teams can instantly locate the information they need without searching across multiple systems.
2. **Streamlined Onboarding & Offboarding.** The template includes predefined workflows and checklists that ensure new hires, transfers, and departures follow a consistent and compliant process. Automated reminders, tasks, and document requests keep the experience smooth and error-free.
3. **Intelligent Document Processing.** Using built-in AI and document processing capabilities, HR teams can automatically extract information from resumes, IDs, certificates, and forms—reducing manual entry and speeding up validation processes.
4. **Absence & Leave Management.** Employees' leave requests, absences, and country-specific holidays are tracked and organized in an intuitive workspace, enabling HR teams to maintain oversight while ensuring policy adherence

December 2025

Vacation Sick Unpaid

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 MC	2 MC NA	3 MC NA	4 MC	5 MC JW	6 JW
7	8	9	10 RM	11 RM	12 RM	13
14	15 SJ	16 SJ	17 SJ	18 SJ	19 SJ	20 SJ ER
21 ER	22 ER	23 ER CB	24 ER CB	25 ER CB	26 ER CB	27 ER CB
28 ER CB	29 ER CB	30 ER	31 ER			

Current Leave Status

Active	10 (100%)
On Vacation	0 (0%)
On Sick Leave	0 (0%)
On Unpaid Leave	0 (0%)

Total Employees: 10

Department Distribution

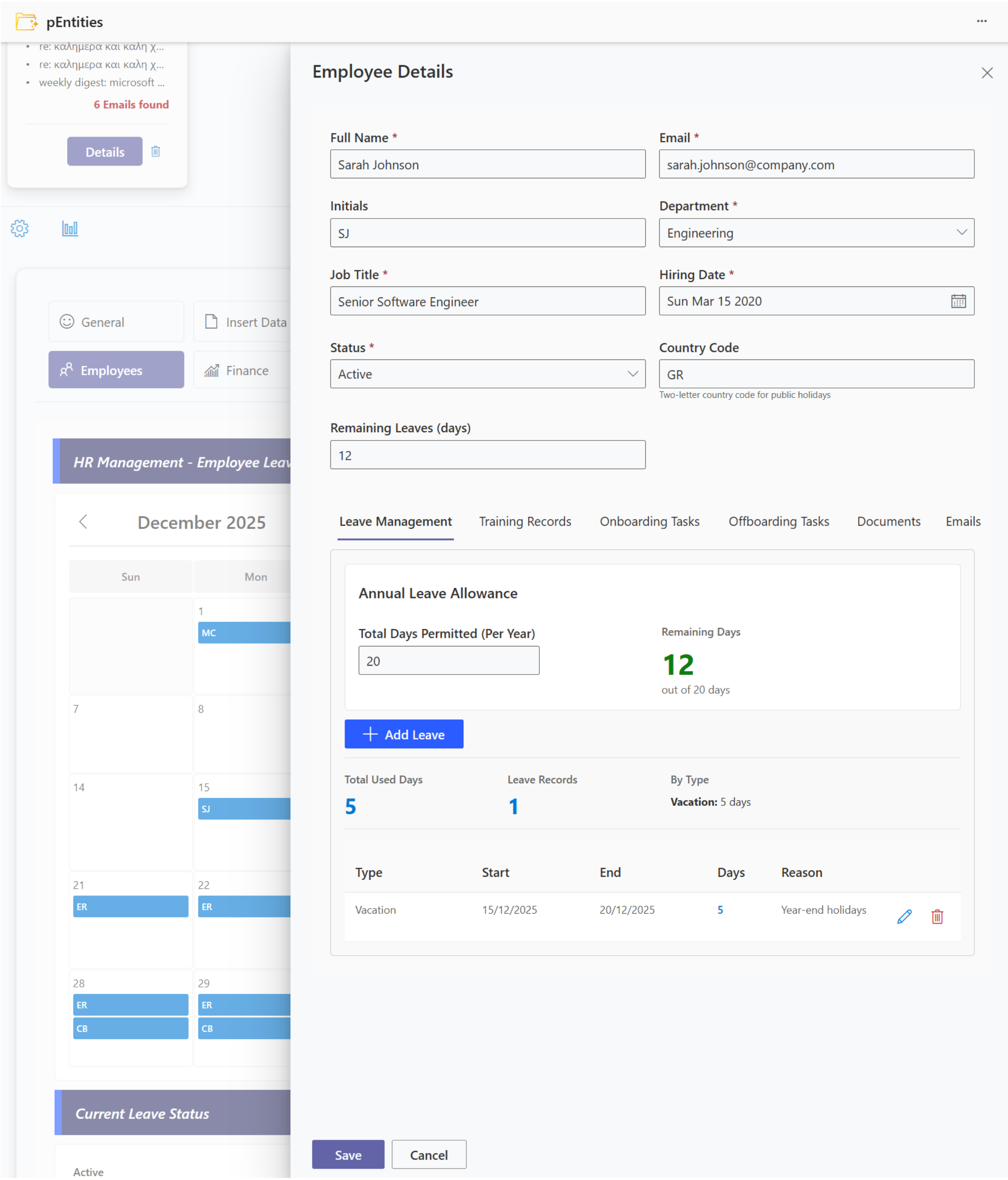
Engineering	3 (30%)
Human Resources	1 (10%)
Marketing	1 (10%)
Finance	1 (10%)
Sales	1 (10%)
Operations	1 (10%)
Design	1 (10%)
Customer Support	1 (10%)

8 Departments

Employee Records

+

Name	Email	Department	Job Title	Hiring Date	Status	Remaining...	Actions
SJ Sarah Johnson	sarah.johnson@company.com	Engineering	Senior Software Engineer	2020-03-15	Active	12 days	
MC Michael Chen	michael.chen@company.com	Human Resources	HR Manager	2019-07-22	Active	8 days	
ER Emily Rodriguez	emily.rodriguez@company.com	Marketing	Marketing Director	2018-01-10	Active	15 days	
DT David Thompson	david.thompson@company.com	Finance	Financial Analyst	2021-05-03	Active	10 days	
JW Jessica Williams	jessica.williams@company.com	Engineering	DevOps Engineer	2020-11-18	Active	14 days	
RM Robert Martinez	robert.martinez@company.com	Sales	Sales Representative	2022-02-14	Active	11 days	
AL Amanda Lee	amanda.lee@company.com	Engineering	QA Engineer	2021-09-01	Active	9 days	



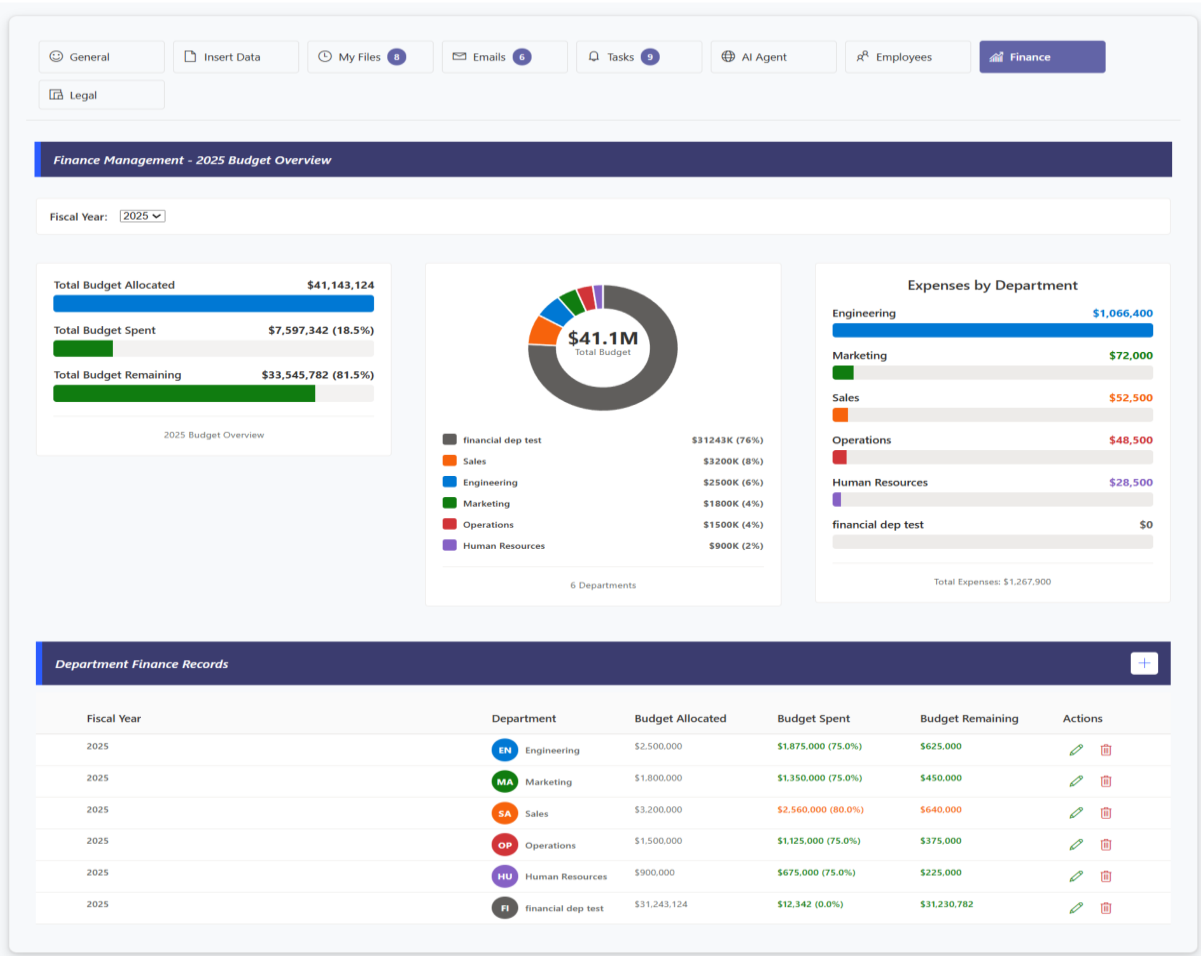
Finance Template

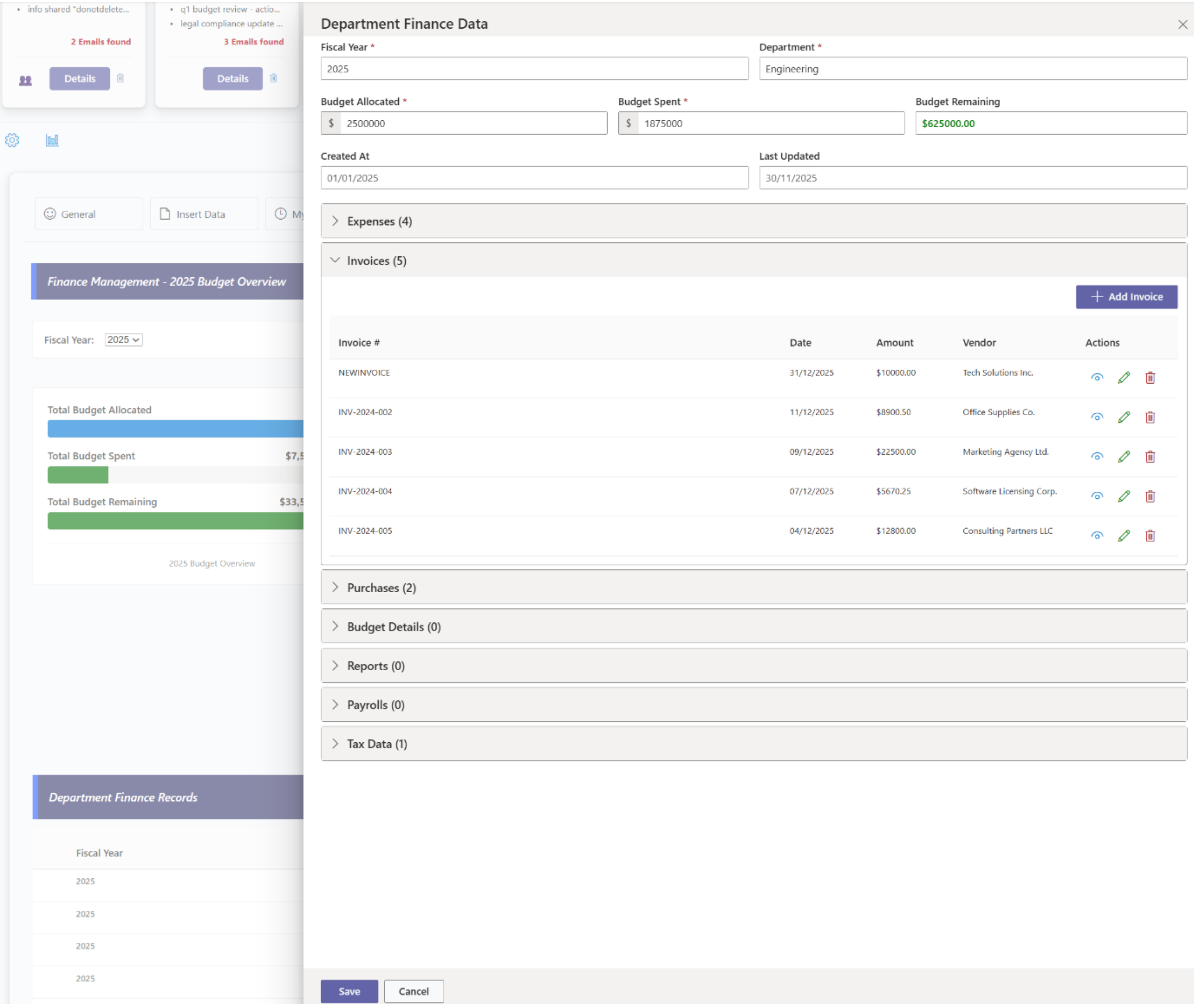
The **pEntities Finance Template** provides a complete, structured, and intelligent workspace designed to simplify, automate, and govern financial operations across an organization. Built for finance teams handling invoices, expenses, budgets, payroll, and approvals, the template centralizes all financial documents, communications, and workflows inside Microsoft 365—reducing manual effort, increasing accuracy, and accelerating financial decision-making.

The template brings together file management, approval cycles, document intelligence, and AI-powered validation to ensure financial processes are fast, compliant, and error-free.

Key Benefits

1. **Unified Financial Records.** All financial documents—including invoices, receipts, purchase orders, statements, payroll records, and budget files—are consolidated into a single organized workspace. Teams have instant visibility into all current and historical records without navigating different systems.
2. **Invoice & Expense Processing.** The Finance Template supports end-to-end processing for invoices and expenses including automatic data extraction, metadata population, and task creation for pending approvals. This improves processing times and reduces manual errors.
3. **Automated Document Extraction.** Using built-in AI extraction models, the template can read and process invoices, receipts, and financial statements automatically capturing totals, dates, vendors, tax values, and more. Finance teams spend less time manually entering numbers and more time analyzing data.
4. **Budget & Purchase Tracking.** Budget files, purchase orders, delivery notes, and vendor communications are organized within the same workspace, making it easy to trace every financial decision and ensure compliance with internal policies.





Legal Template

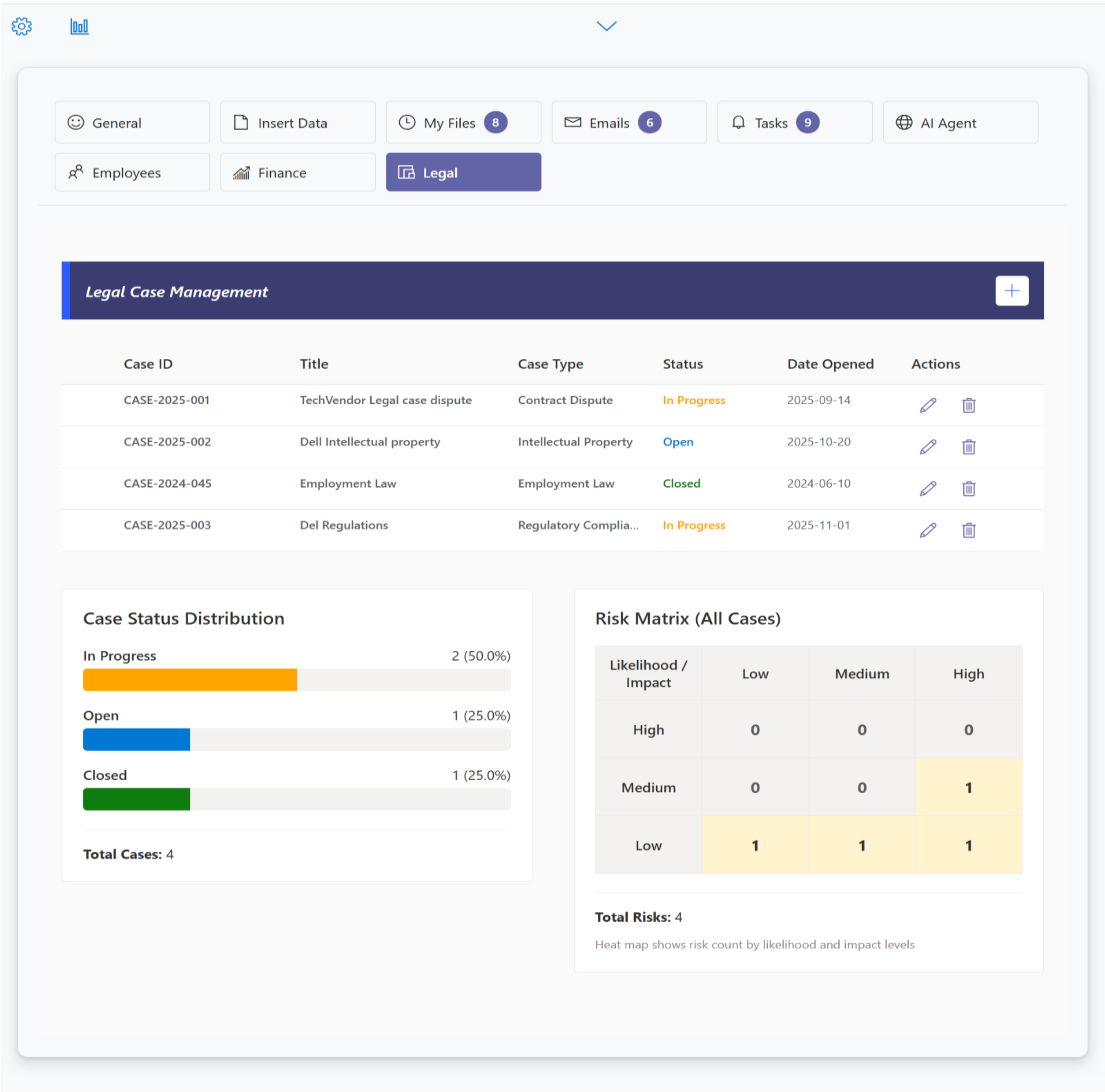
The **pEntities Legal Template** is a purpose-built digital workspace that unifies legal case management, contract lifecycle handling, compliance documentation, and legal correspondence into one seamless environment inside Microsoft 365. Designed for legal departments, law firms, and compliance-driven organizations, it eliminates fragmented processes and ensures all legal materials are traceable, organized, and audit-ready.

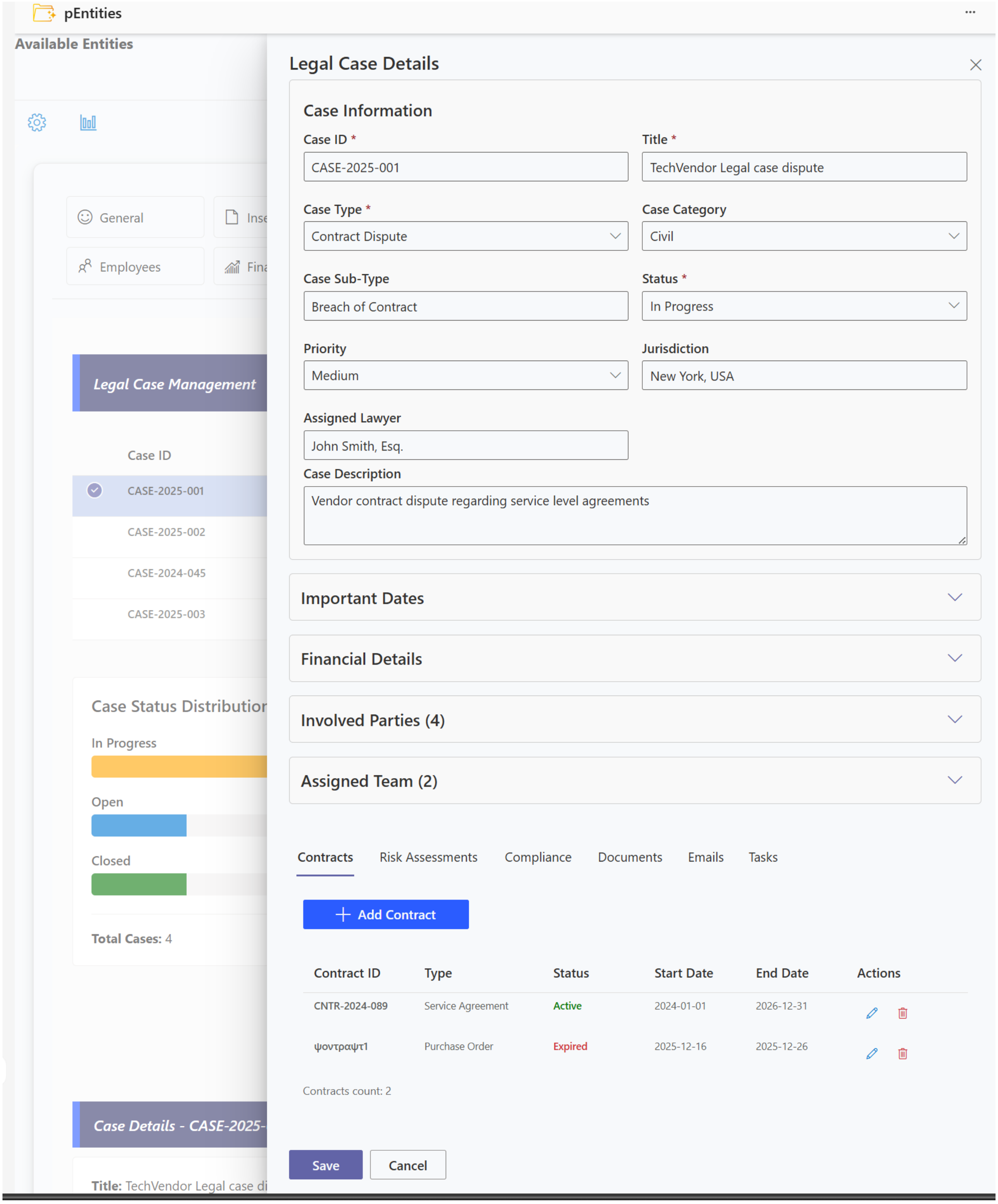
With intelligent automation, structured document governance, and domain-aware AI capabilities, the template helps legal teams work faster, reduce risk, and maintain full control over their matters.

Key Benefits

1. **Centralized Legal Case Management.** All case files—including evidence, correspondence, stakeholder notes, and supporting documents—are stored in a unified, well-organized workspace. Legal teams have immediate access to the full case history without switching between systems or losing critical context.

2. **Easy Contract Lifecycle Handling**. The template supports the entire contract lifecycle, from drafting to negotiation, review, approval, renewal, and termination. It provides version history, metadata tracking, and automated reminders so teams never miss renewal deadlines or compliance milestones.
3. **Governance-Ready Compliance Management**. Policies, regulatory requirements, and compliance documentation are stored in a structured and searchable format. Built-in workflows ensure approval steps, updates, and reviews are properly tracked and easily referenced during audits.
4. **Intelligent Document Processing**. Using advanced extraction models, legal teams can automatically identify key contract details—clauses, dates, parties, obligations, and more—dramatically reducing review time and minimizing human error.




pEntities
Available Entities
General
Employees
Legal Case Management
Case ID
CASE-2025-001
CASE-2025-002
CASE-2024-045
CASE-2025-003
In Progress
Open
Closed
Total Cases: 4
Title: TechVendor Legal case di
Legal Case Details
Case Information
Case ID *
CASE-2025-001
Title *
TechVendor Legal case dispute
Case Type *
Contract Dispute
Case Category
Civil
Case Sub-Type
Breach of Contract
Status *
In Progress
Priority
Medium
Jurisdiction
New York, USA
Assigned Lawyer
John Smith, Esq.
Case Description
Vendor contract dispute regarding service level agreements
Important Dates
Financial Details
Involved Parties (4)
Assigned Team (2)
Contracts
Risk Assessments
Compliance
Documents
Emails
Tasks
Add Contract
Contract ID
Type
Status
Start Date
End Date
Actions
CNTR-2024-089
Service Agreement
Active
2024-01-01
2026-12-31
ψοντραψτ1
Purchase Order
Expired
2025-12-16
2025-12-26
Contracts count: 2
Save
Cancel