framesoft

Framesoft Contract Management (FCM) Overview

Transforming Contract Management Across the Entire Lifecycle

AI-supported. Workflow-driven. Fully integrated.

Control contracts. Reduce risk. Accelerate business.

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1 Contract Management

1.1 Why is Contract Management so important?

Contract management is not just a supportive function; it is a strategic imperative. It ensures regulatory compliance, risk mitigation, operational efficiency, and the maintenance of client trust and relationships, all of which are essential for the success and sustainability of any organization in a complex and dynamic environment.

Contract Management plays a crucial key role as follow:

- Regulatory Compliance

  Contracts must comply with a plethora of laws and regulations, including international standards, anti-money laundering (AML) regulations, and data protection laws. Effective contract management ensures compliance, thus avoiding legal penalties, financial losses, and reputational damage.

- Risk Management

  Financial services deal with a range of risks including credit risk, market risk, operational risk, and liquidity risk. Contracts often contain complex terms related to risk management. Proper management of these contracts and their underlying transactions helps in identifying, assessing, and mitigating these risks timely and effectively.

- Complex Products and Services

  The complexity of financial products and services, such as derivatives, insurance policies, and investment vehicles, necessitates meticulous contract management. It ensures that all parties clearly understand their obligations, rights, and the intricacies of the products / services involved.

- Client Trust and Relationships

  Efficient contract management helps in building and maintaining trust by ensuring transparency, adherence to agreements, and swift resolution of issues.

- Operational Efficiency

  Efficient contract management processes lead to significant operational efficiencies. Automating and streamlining contract processes reduce administrative burdens.

- Data Security and Privacy

  Financial institutions manage sensitive client data, making data security and privacy a top priority. Contract management ensures that all contracts comply with data protection laws and corporate standards.

- Global Operations and Compliance

  Companies operating globally, subjecting them to various international laws and regulations. Effective contract management is vital for navigating these complexities, ensuring global compliance and operational consistency.

- Mergers and Acquisitions (M&A)

  Involving the review and integration of numerous contracts, ensuring they align with the new entity's goals and comply with regulatory requirements.

- Cost Management

  Effective contract management helps in controlling costs. It ensures that the terms of any agreement are optimized for financial efficiency and aligned with the organization's financial goals.

- Adaptability to Market Changes

  The financial services industry is subject to rapid market changes and economic fluctuations. Agile contract management allows institutions to quickly adapt their contractual relationships and terms to reflect changing market conditions, maintaining competitiveness and relevance.

- Intellectual Property and Confidentiality

  Effective contract management protects valuable intellectual property and trade secrets through confidentiality clauses and non-disclosure agreements, safeguarding the firm’s competitive edge.

- Litigation and Dispute Resolution

  Effectively managed contracts reduce the likelihood of disputes and provide clear mechanisms for dispute resolution.

- Auditing and Reporting

  Financial institutions face strict auditing and reporting requirements. Efficient contract management ensures that all contracts are properly documented, easily accessible, and audit-ready, facilitating compliance with reporting obligations.

- Technology Integration

  The increasing role of technology in financial services adds complexity to contracts. Effective contract management ensures that these technological aspects are properly addressed.

- Sustainability and Social Responsibility

  With growing emphasis on sustainability and ethical practices, organizations are increasingly required to demonstrate these values in their operations and investments.

1.2 How Framesoft Contract Management (FCM) contributes to these goals

Framesoft Contract Management (FCM) provides a governed, end-to-end platform for managing contracts and their supporting documents across the complete lifecycle. It combines structured data, workflow automation, document generation, digital negotiation, AI-assisted processing, lifecycle control, reporting, and auditability to improve speed, transparency, compliance, and decision quality.

FCM supports six connected stages: Request & Intake; Create & Draft; Review & Negotiate; Execute & Onboard; Operate & Monitor; and Amend, Renew & Terminate. Framesoft Artificial Intelligence (FAI) is embedded across these stages to turn contract content into validated, actionable data and to assist users within governed workflows.

1.2.1 Request & Intake

FCM supports the controlled intake of any contract type and its supporting documents. Business users can configure contract-type-specific data, required documents, checks, responsibilities, and workflow routes without changing the underlying platform.

Predefined FCR workflows move requests, data, and documents through the appropriate processing stages, including:

- Request Initiation
- Credit Risk Terms entry
- Due Diligence Checks

- Contract Drafting
- Contract Negotiation / Review
- Approvals
- Release

Depending on the request and contract type, FCM can route specialized processes such as:

- Agreement / Annex
- Amendment
- Non-Standard Terms (NST)
- Legal Opinion
- Termination

1.2.2 Create & Draft

Framesoft Document Assembly (FDA) accelerates the creation of consistent contracts and supporting documents by combining approved templates, reusable clauses, rules, and validated FCR data.

Templates and clauses are centrally governed and version-controlled. FDA applies the correct approved content for the relevant contract type and scenario, reducing manual drafting, inconsistency, and rework.

Generated documents remain connected to FCM workflows for review, approval, electronic signature, distribution, and downstream processing. This keeps document production, contractual data, and governance aligned from initial drafting through execution.

1.2.3 AI Across the Complete Contract Lifecycle

Framesoft Artificial Intelligence (FAI) is the governed intelligence layer embedded in FCM and FCR. It supports intake and classification, OCR, data and clause extraction, validation and reconciliation, drafting, review and negotiation, semantic retrieval, lifecycle monitoring, and workflow-driven follow-up actions with human oversight and full auditability.

1.2.4 Review & Negotiate

FCM combines controlled internal review, approval workflows, and secure digital collaboration so organizations can negotiate efficiently while protecting legal, commercial, risk, and compliance requirements.

Framesoft Online Negotiation (FON) enables internal and external parties to assemble, review, comment on, redline, and negotiate the same governed document online. Its integration with FCR, FDA, and FAI reduces email-based exchanges, manual version handling, and reconciliation effort.

1.2.5 Govern Non-Standard Terms

When negotiated language deviates from approved standards, FCM can initiate a Non-Standard Terms workflow. The proposed and standard language are captured together, routed to the required reviewers and approvers, and—once approved—retained with full traceability for controlled reuse and future analysis.

1.2.6 Evaluate Legal Enforceability

FCM supports governed legal-opinion requests and the capture of enforceability conclusions needed for contractual, netting, collateral, capital, and risk decisions.

Legal opinions can be requested during drafting, negotiation, onboarding, or ongoing lifecycle management. Relevant conclusions, scope, assumptions, jurisdictions, agreement types, and review dates are captured as structured, auditable information.

The legal-opinion workflow coordinates initiation, expert selection, cost coverage, review, netting recommendations, approval, release, and downstream use of the resulting conclusions.

1.2.7 Execute & Onboard

FCM supports controlled completion, approval, signature, release, and onboarding of legally binding contracts. Executed documents and validated agreement data are made available to authorized downstream systems and operational teams.

1.2.8 Centralize & Archive

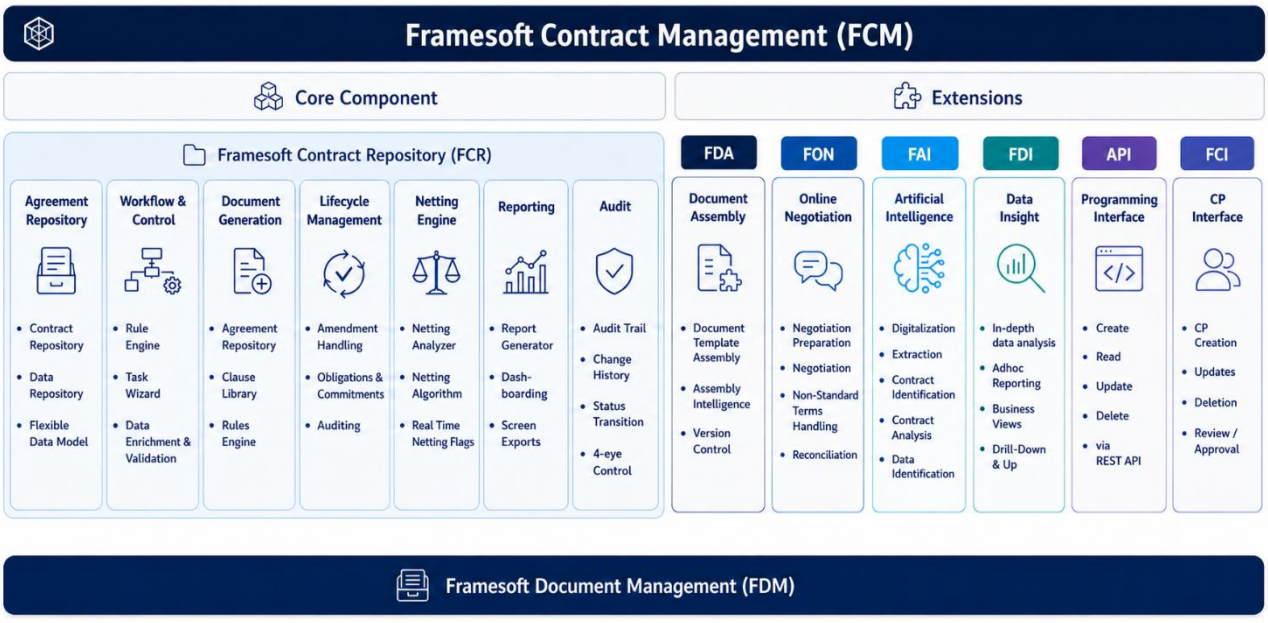
Contracts and supporting documents are stored in a centralized, governed repository for secure retrieval, retention, collaboration, and audit. Tight integration with Framesoft Document Management (FDM) connects contract records, electronic files, and document content within the user's working environment.

1.2.9 Operate, Monitor, Amend, Renew & Terminate

FCM manages contractual events, obligations, commitments, milestones, reviews, amendments, renewals, and terminations throughout the active life of an agreement. Structured data and workflow controls keep contract status, documents, decisions, and downstream information synchronized.

2 Framesoft Contract Management (FCM)

Framesoft Contract Management (FCM) is an integrated, contract-type-neutral platform for governing contracts, documents, data, decisions, and obligations across the complete lifecycle—from Request & Intake through Create & Draft, Review & Negotiate, Execute & Onboard, Operate & Monitor, and Amend, Renew & Terminate. FCM combines the Framesoft Contract Repository (FCR) with configurable workflows and specialized extensions for document assembly, online negotiation, artificial intelligence, analytics, counterparty integration, security, and enterprise connectivity.



FCM integrates with the corporate IT landscape through APIs and configurable interfaces, enabling governed exchange with trading, risk, collateral, counterparty, document, reporting, and archive systems. It can be deployed on premises, in a customer-managed cloud, or as Framesoft Software as a Service (SaaS).

2.1 FCM Objectives & Benefits

Digitize, govern, and automate end-to-end contract processes—from documentation requests and contract creation to negotiation, execution, lifecycle events, netting decisions, and the delivery of validated agreement and collateral data to Trading and Risk Management systems.

- Regulatory Capital Optimization – Capture enforceability and netting information precisely, automate governed netting decisions, and support reductions in Exposure at Default (EAD) and Risk-Weighted Assets (RWA).
- Risk Reduction – Maintain consistent contract data and documents across upstream and downstream systems, reducing operational errors, duplication, and control gaps.
- Productivity & Growth – Accelerate contract cycles through configurable workflows, document generation, online negotiation, AI assistance, and reusable governed content.
- Regulatory Compliance – Provide controlled approvals, compliance tracking, traceable decisions, retention controls, and a secure audit trail.
- Process Transparency – Give authorized users real-time visibility into contract status, responsibilities, obligations, milestones, exceptions, and bottlenecks.
- Data Capture & Management – Capture, validate, structure, and reconcile contractual data for reliable downstream processing, risk analysis, and reporting.
- Document Management – Centralize contracts, clauses, templates, drafts, execution copies, and supporting documents with version control and governed access.

3 Framesoft Contract Repository (FCR) - FCM Core Module

Framesoft Contract Repository (FCR) is the governed core of FCM. It manages agreement data, documents, workflows, decisions, obligations, events, amendments, renewals, and terminations across the complete lifecycle. Its configurable data model and rule-driven services also support netting evaluation, reporting, auditability, and the controlled delivery of contract information to downstream systems.

FCR consists of the following modules:

3.1 Agreement Repository

Based on its unlimited flexible data model, FCR supports the setup & design of any agreement / contract type, structured data items & clauses to be stored for contracts & annexes. FCR can be extended at any time to cover any new agreement types or additional details via configuration only. Access privilege restrictions on agreement data based on client entities are also supported in FCR.

3.2 Workflow Engine

The FCR Workflow Engine is designed to manage, automate, and optimize business processes. It provides a structured approach to handling tasks, approvals, and the flow of information within an organization such as e.g.,

- Agreement / Contract Request & Onboarding,
- Non-Standard Term (NST) handling
- Legal Opinion
- Approval & Agreement Generation as well as
- Amendment handling

and offers the following functionalities:

- Process Modeling

  Design and visualize workflows using a graphical interface, defining the sequence of tasks, decision points, and the flow of data.

- Task Management

  Automates the assignment and tracking of tasks, ensuring they are completed by the right personnel in a timely manner.

- Rule Engine

  Executes predefined business rules to route tasks, make decisions, and trigger actions based on specific conditions and criteria.

- Integration

  It may relate to other enterprise systems (e.g., ERP, CRM, databases) to exchange data, ensuring seamless information flow across different platforms.

- Multi Workflow Integration / Bundling

  Multiple contracts can be bundled to optimize data entry for all contracts in a single task & separated again upon reaching a defined workflow status (e.g., “Generation of first draft”)

- Notification System

  Send automated notification messages, e-Mails, alerts, and reminders to users about pending tasks, deadlines, and status changes to keep the process on track.

- Access Control

  Manages user permissions and roles to ensure that only authorized individuals can perform certain actions or access sensitive information.

- Monitoring and Reporting

  Offering visibility into workflow performance, generating reports and analytics on process efficiency, bottlenecks, and compliance. Furthermore, reassignments of workflow tasks can be managed.

- Audit

  Complete Workflow History available.

3.3 Contract Generator & Document Editor

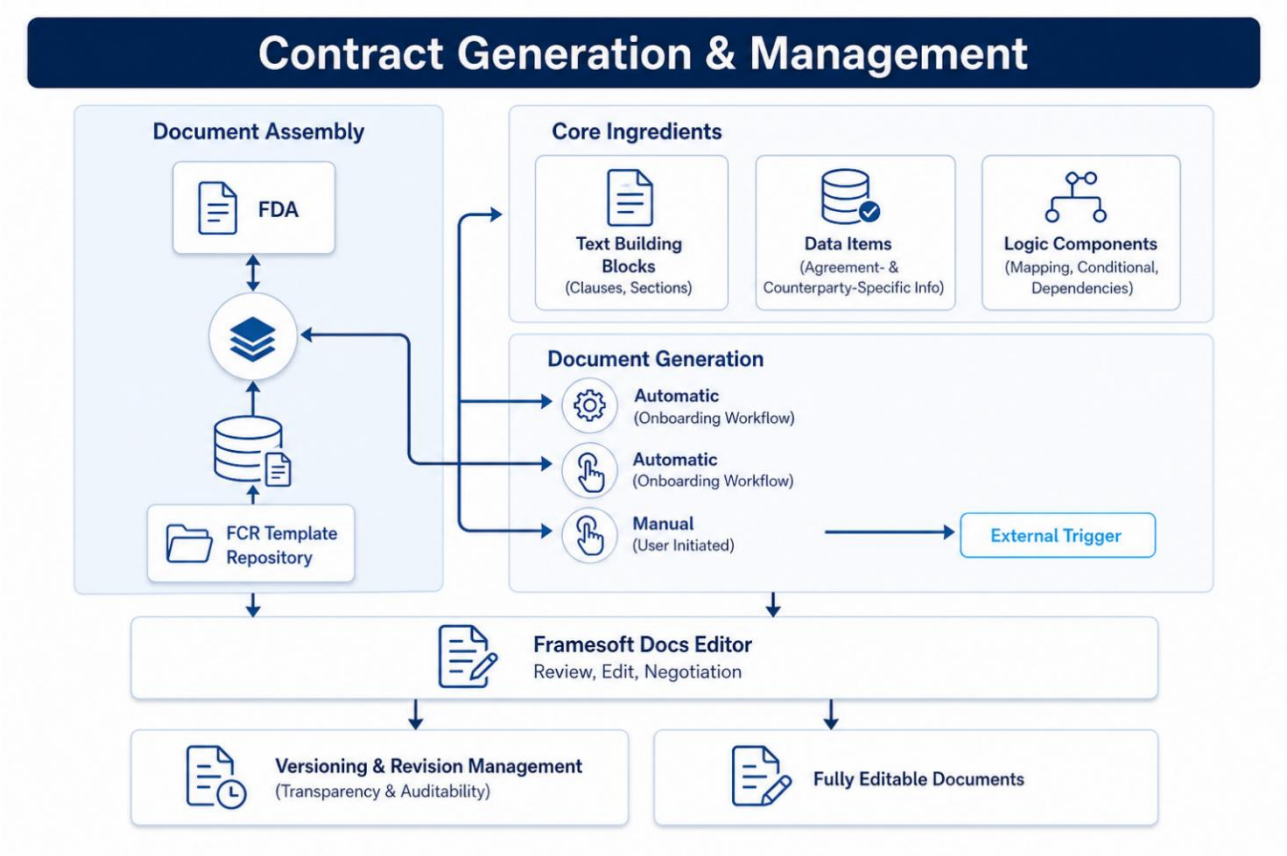
Based on assembled document templates from the FDA or the FCR template repository, contracts can be generated automatically as part of an onboarding workflow, manually by users, or triggered by external systems.

Any document generation is fundamentally based on the following core ingredients:

- Text Building Blocks (e.g., clauses, sections, and template components),
- Data Items (agreement- and counterparty-specific information), and
- Logic Components (e.g., mapping rules, conditional logic, and dependencies).

These ingredients are orchestrated to ensure consistent, data-driven, and rule-based document creation.

Once generated, documents can be reviewed, edited, and / or passed on for (online) negotiation.



Generated documents remain fully editable, and any modification is automatically tracked through versioning and revision management, ensuring full transparency and auditability via the embedded "Framesoft Docs" document editor.

Based on the assembled document templates via FDA or FCR template repository, documents (contracts) are generated automatically as part of an onboarding workflow, manually or triggered externally.

Framesoft Docs further provides the following capabilities:

- Global Styles

  Global Styles allow users to update the overall appearance of a document consistently across all sections, without the need to manually edit individual blocks, clauses, or pages.

- Track Change Mode

  Supports structured reviews and contract negotiations by tracking all changes, comments, and revisions.

- Document Export

  Documents can be exported in MS Word, MS Excel, or PDF format for downstream processing, sharing, or archiving.

3.4 Event & Lifecycle Management

Framesoft Contract Event & Lifecycle Management provides a comprehensive and structured framework for managing contracts across their entire lifecycle. It ensures that all contractual events, obligations, and changes are consistently governed from contract inception through execution, ongoing performance, amendment, and eventual expiration or termination.

The primary objective of the FCR lifecycle management module is to enable transparency, control, and automation across all contract-related activities, supporting compliance, risk mitigation, and optimized business outcomes.

- End-to-End Lifecycle Coverage

  FCR supports a continuous and auditable contract lifecycle, encompassing the following core functional domains:

  ✓ Contract Review

  Contracts are reviewed in a structured manner to ensure completeness, accuracy, and alignment with legal, regulatory, and commercial requirements prior to activation or amendment. This can be supported by using Framesoft Artificial Intelligence (FAI).

- ✓ Netting of Trades

  Netting flags and logic support the identification and management of nettable agreements and transactions, enabling consistent treatment for risk, collateral, and regulatory purposes.

- ✓ Amendment Handling

  Amendments are managed as first-class lifecycle events, with full traceability and comparison capabilities, including comparison of amendment records against the currently valid agreement as well as comparison of amendment records against the baseline agreement.

- ✓ Expiration & Termination

  Critical lifecycle dates, including expirations, terminations, and renewal options, are actively tracked and managed through reminders, workflows, and status transitions.

- ✓ Permissions

  Role-based access and permission controls ensure that contract data, lifecycle actions, and events are managed in accordance with defined governance and authorization models.

- ✓ Auditing

  All lifecycle events, data changes, and status transitions are fully logged and auditable, providing transparency and supporting internal and external audit requirements.

- ✓ Compliance & Retention

  Contracts are managed in line with regulatory compliance and data retention policies, ensuring that records are retained, archived, or disposed of according to applicable rules.

- ✓ Fee Calculation

  Contractual fee structures and financial terms can be tracked and aligned with lifecycle events, supporting accurate calculation, validation, and downstream processing.

- ✓ Events & Milestones

  Key contractual events and milestones (e.g., effective dates, notice periods, renewals, deliverables) are systematically tracked and monitored throughout the contract lifecycle.

- ✓ Obligations & Commitments

  Contractual obligations and commitments are captured, monitored, and linked to reminders and workflows to ensure timely fulfillment and risk mitigation.

- ✓ Reporting & Performance

  Comprehensive reporting and performance views provide insight into contract status, lifecycle events, obligations, and compliance metrics across the contract portfolio including To Do Lists, Reminder Lists and e-Mails, Expiration Lists & e-Mails, etc..

- Lifecycle Governance & Automation

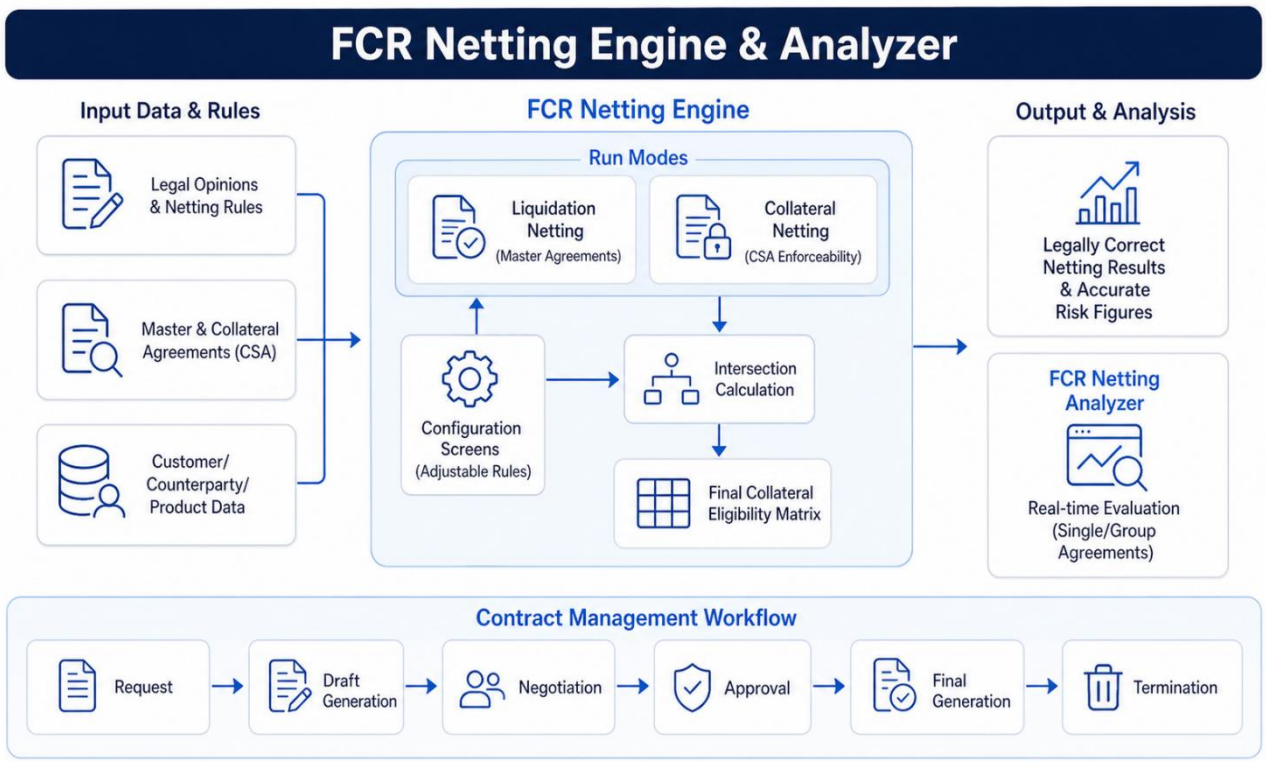
  Across all lifecycle stages, FCR provides:

  - ✓ Reminder, follow-up, and to-do management
  - ✓ Workflow-driven lifecycle transitions
  - ✓ Change history and version transparency
  - ✓ Controlled status transition handling

Framesoft Contract Event & Lifecycle Management delivers a unified, event-driven lifecycle framework that ensures contracts are consistently governed, auditable, and compliant—while providing full visibility and control from review and execution through amendment, performance, and termination.

3.5 Netting Engine & Analyser

FCR focuses on automated netting decisions based on legal opinions & netting rules. The netting engine scans on demand or automated as batch process FCR to find potentially nettable combinations of customer & counterparty (on branch level) and individual product traded. Based on these netting details risk systems can calculate legally correct netting results & accurate risk figures. It considers liquidation netting based on master agreements, as well as collateral agreements allowing further reduction of risk resulting from trades done that are covered under a CSA. Here again, FCR fully relies on configuration screens. All netting rules are adjustable at any time. It allows reacting immediately on market events. Furthermore, FCR offers all required contract management functionalities from the contract request until its termination. FCR's workflow engine leads through the process of draft agreement generation, negotiation, approval, and final generation. The final agreement terms are stored in FCR's highly flexible data model ready to support any agreement type.



- Netting Types, Systems and Netting Rules

  Netting types and netting systems are configured in FCR. Each combination might have its own rule set that is pulled once the netting algorithm is started in the corresponding run mode. While liquidation netting is overseeing the master agreements (and annexes) according to the rule set for liquidation purposes, “Collateral Netting” is performing additional checks regarding the collateral enforceability of certain products under certain collateral annexes. In collateral run mode, when a collateral agreement has been identified, first the corresponding master agreement is evaluated to find the main products covered. Based on this result set, the collateral rules are applied, and products might be subtracted from the initial result set. An intersection is applied between the liquidation evaluation of the master and the collateral evaluation of the CSA, which provides the final collateral eligibility matrix. Typically counterparty properties are used to deal with counterparty types. To avoid duplication of data entry, the counterparty types are managed on master agreement level only, but collateral rules are further defined on the counterparty type.

- Netting Algorithm

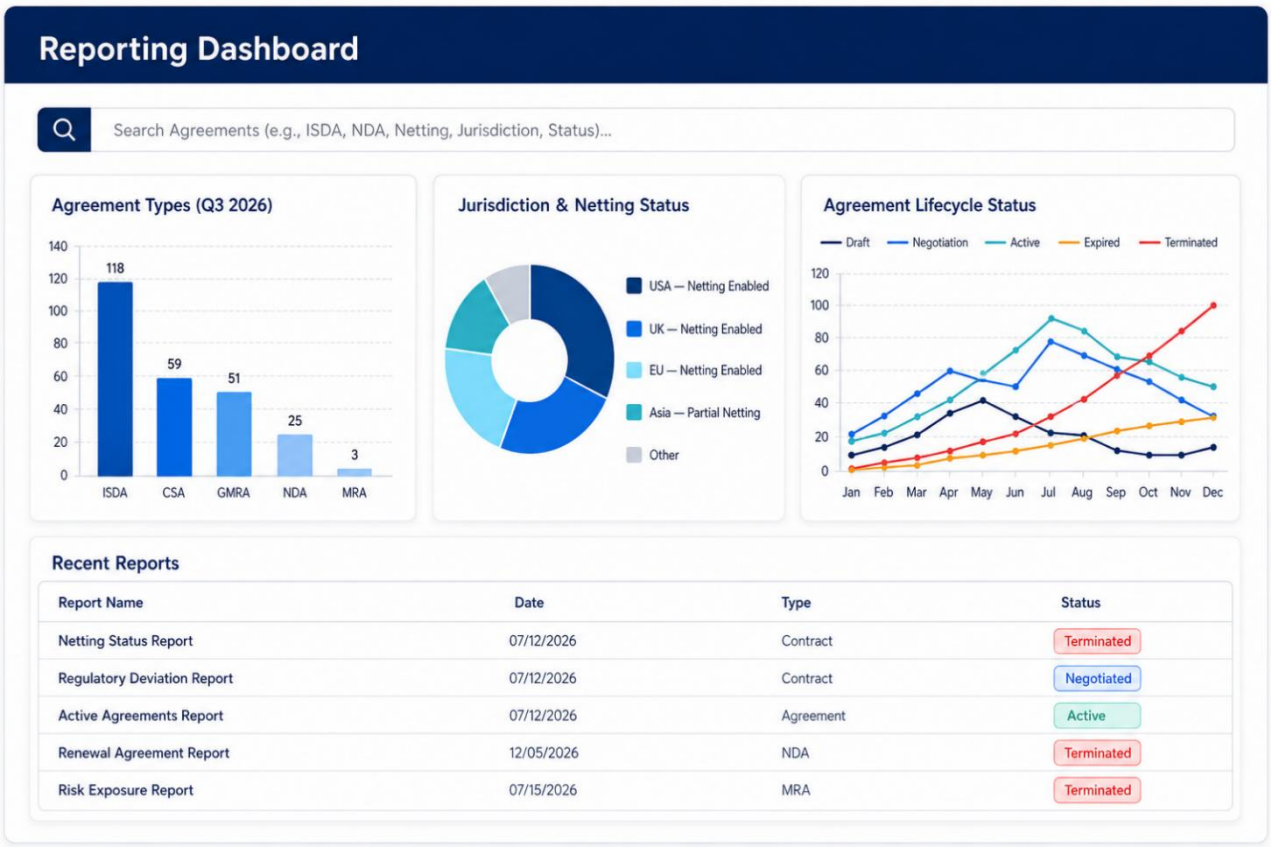
  The netting algorithm is based on the configuration of the netting rules in FCR. The FCR netting algorithm processes all agreements for which according to the jurisdiction of the counterparty and agreement type netting rules are in place. Such netting checks are done on the level of the master agreement first. Upon success, available annexes are further evaluated, which potentially add additional products to the master coverage.

- Netting Analyzer

  Real time netting evaluation of single agreements, groups of agreements or a free selection of agreements via FCR Netting Analyzer embedded in FCR.

3.6 Search & Reporting

The FCR Search & Reporting Module provides powerful, flexible, and user-friendly capabilities to access, analyze, and report on contract data across the entire repository. It enables users to efficiently retrieve structured contract information, gain transparency across agreement portfolios, and support operational, legal, risk, and compliance reporting requirements.



Key Capabilities

- Comprehensive Search Screens

  Dedicated search interfaces allow users to query and navigate core FCR entities, including:

  - ✓ Agreements
  - ✓ Agreement clauses
  - ✓ Counterparties
  - ✓ Properties and additional contract-related data objects

  Advanced filtering and sorting options enable precise and efficient data retrieval.

- Framesoft Report Generator (FRG)

  The Framesoft Report Generator supports the definition, execution, and scheduling of customized report requests. Generated reports can be seamlessly passed on to Framesoft Data Insight (FDI) for further analysis, aggregation, and visualization.

- Direct Data Export

  Overview tables within FCR can be exported directly to MS Excel, allowing users to perform ad-hoc analysis, reconciliation, and offline reporting with minimal effort.

- Filtering in Overview Tables

  Configurable filters within FCR overview screens enable users to dynamically refine result sets based on contract attributes, lifecycle status, counterparties, dates, and other key criteria.

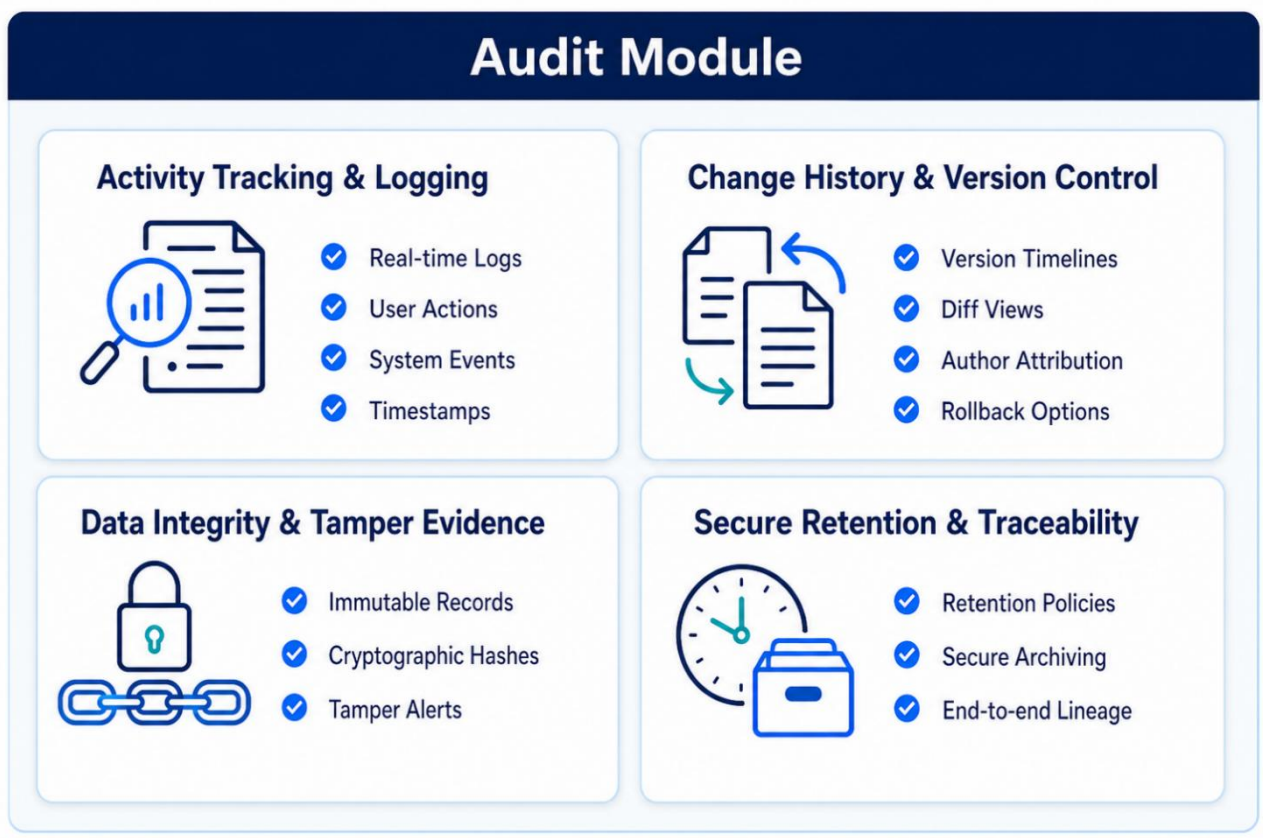
- Configurable Reports as FCR-Screens

  Reports can be configured and exposed as native FCR screens, providing users with role-specific, real-time views embedded directly into their operational workflows.

The FCR Search & Reporting Module delivers fast access to structured contract data, flexible reporting capabilities, and seamless integration with analytical tools—enabling transparency, informed decision-making, and efficient contract portfolio management.

3.7 Audit

The FCR Audit Module provides a comprehensive and tamper-evident audit framework to ensure full transparency, accountability, and compliance across all contract-related activities. It maintains a complete audit trail of all record activity throughout the contract lifecycle, supporting regulatory, security, and operational oversight requirements.



FCR Audit Module`s Core Capabilities

- Comprehensive Activity Tracking & Logging

  All relevant system activities are systematically recorded, including:

  ✓ Record creation
  ✓ Data access
  ✓ Modifications and updates
  ✓ Deletions

  This ensures end-to-end traceability of user actions and system events.

- Change History & Version Control

  Every change to contract data and documents is captured and made transparent through dedicated change history views and versioning mechanisms, enabling clear reconstruction of historical states.

- Data Integrity & Tamper Evidence

  Audit mechanisms ensure the integrity of stored records and provide unmistakable evidence of any unauthorized or unintended changes.

- Governance & Control Mechanisms

  The Audit Module enforces strong governance through:

  ✓ Change History Screens providing detailed, user-readable audit views
  ✓ Controlled Status Transitions ensuring lifecycle changes follow defined rules
  ✓ Four-Eye (4-Eye) Control to support segregation of duties and approval requirements for sensitive actions

- Secure Retention & Traceability

All audit logs are stored securely and retained in accordance with defined retention policies. This guarantees long-term traceability and supports internal controls, external audits, and regulatory examinations.

The FCR Audit Module delivers a robust, audit-ready foundation by combining comprehensive activity logging, strict governance controls, and secure retention—ensuring transparency, compliance, and trust across the entire contract lifecycle.

4 Framesoft Contract Management (FCM) Extensions

To extend the functional scope of the Framesoft Contract Repository (FCR) the following fully integrated extensions are available:

- Framesoft Agreement API
- Framesoft Document Assembly (FDA)
- Framesoft Online Negotiation (FON)
- Framesoft Artificial Intelligence (FAI)
- Framesoft Counterparty Interface (FCI)
- Framesoft Data Insight (FDI)
- Framesoft Advanced Security (FAS)

4.1 Framesoft Agreement API

The Framesoft Contract Repository (FCR) Agreement Application Programming Interface (API) provides a robust and secure integration layer that seamlessly connects FCR with corporate IT landscapes and external systems. It enables standardized, automated interaction with core contract data and lifecycle elements, supporting straight-through processing and system interoperability.

The Agreement API allows external and corporate systems to programmatically trigger Create, Read, Update, and Delete (CRUD) operations on key FCR objects, ensuring consistent data exchange and controlled lifecycle management.

The FCR Agreement API enables interaction with a broad range of contract-related entities, including but not limited to:

- Agreements
- Agreement Clauses (first-level data points)
- Annexes
- Amendments
- Bank and Counterparty Branches
- Underlying Principals
- Counterparty Properties (e.g., Form of Organization)
- Netting Flags
- Product Coverage

Additional configurable agreement-related objects

This flexible object model allows institutions to integrate FCR deeply into their contractual, legal, risk, and operational processes.

The FCR Agreement API is provided as a RESTful API, designed for scalability, interoperability, and ease of integration. All API requests are subject to strict authentication and validation controls enforced by FCR, ensuring data integrity, security, and compliance with internal governance requirements.

Each request undergoes credential verification and rule-based validation before being processed.

As an integral part of the API offering, FCR provides a dedicated API Health Status component, delivering transparency and operational control over API interactions. This component supports:

- A complete log of all API requests received
- Status monitoring for individual requests
- Visibility into rejection reasons for non-accepted requests

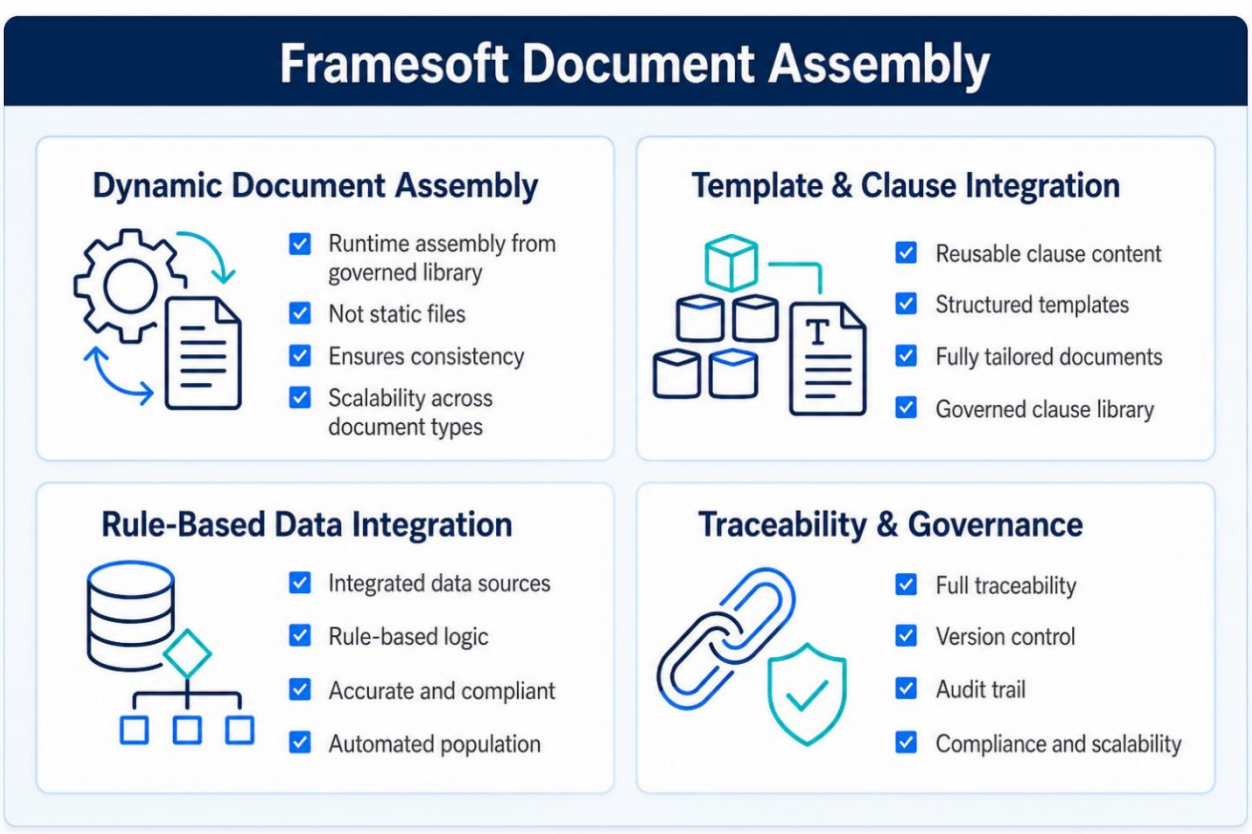
This ensures efficient troubleshooting, operational monitoring, and audit readiness.

The FCR Agreement API enables secure, automated, and controlled integration of contract data and lifecycle events into enterprise systems, supporting straight-through processing, data consistency, and scalable contract management across the organization.

4.2 Framesoft Document Assembly (FDA)

Framesoft Document Assembly (FDA) is an advanced document automation solution designed to fundamentally simplify and accelerate the creation, management, and lifecycle control of complex legal and commercial documents.

FDA enables organizations to generate accurate, compliant, and fully tailored documents by combining reusable clause content, structured templates, integrated data sources, and rule-based logic. Documents are not created as static files but are dynamically assembled at runtime from a governed clause library, ensuring consistency, traceability, and scalability across all document types.



FDA seamlessly integrates workflow automation for review, approval, electronic signature, and distribution, enabling an efficient and controlled end-to-end document process.

At the heart of FDA is the principle that each clause is a modular, reusable building block. A clause maintained once in the clause library can be reused across any number of documents, sections, or document templates, without duplication.

Any update to a clause in the FDA clause library automatically:

- Creates a new clause version
- Triggers a mandatory approval process
- Prevents the updated version from being used for document generation until approval is completed

This ensures that only legally approved and governed content is used in automated document creation.

New document templates can be assembled on demand and at runtime by combining approved clauses, sections, and sub-documents, significantly reducing setup time while maintaining full control and compliance.

FDA consists of the following functional Components:

- Clause Library

  The clause library is a centralized repository of legally vetted, reusable clauses.

  Clauses

  ✓ contain placeholders for variable data, making them dynamic and adaptable
  ✓ can be reused across multiple document types and templates
  ✓ are fully version-controlled; any clause update creates a new clause version

- ✓ require approval before the updated version can be used for document generation
- ✓ retain all historical clause versions for audit, compliance, and traceability

In addition to versioning, FDA distinguishes clearly between:

- ✓ Clause versions (library-level changes, governed and approved), and
- ✓ Clause revisions (document- or negotiation-specific changes)

This distinction provides full transparency across the entire document lifecycle.

- Document Template Assembly

  FDA allows clauses to be assembled e.g., into:

  - ✓ Sections and sub-sections
  - ✓ Sub-documents
  - ✓ Complete document templates

  Templates can be created or modified on the fly, using approved clauses from the FDA clause library. Any creation or update of clauses, sections, or templates is routed through an approval workflow before release.

  FDA's Document Assembly Intelligence automatically manages numbering, formatting, and styles during generation.

- FCR Integration

  FDA integrates with FCR's data model to:

  - ✓ Populate clause variables
  - ✓ Apply conditional logic
  - ✓ Ensure data consistency across documents

- Conditional Logic

  Rule sets determine:

  - ✓ Which clauses or paragraphs are included
  - ✓ How data is populated
  - ✓ Under which conditions alternative wording or structures apply

  This enables the generation of highly tailored documents without manual intervention.

- Document Generation

  Approved FDA document templates can be used for document generation via:

  - ✓ Integration into a Document Request Workflow
  - ✓ (Re-)generation of manually selected documents
  - ✓ API-triggered document generation
  - ✓ Additional configurable generation actions

  The correct document template is selected automatically based on predefined mappings.

- Post-Generation Editing & Clause Revisions

  After generation, documents are presented in an integrated editor for post-generation editing.

  If a clause is modified as part of a contract negotiation:

  - ✓ The change is recorded as a clause revision, not as a new clause library version
  - ✓ The original clause version remains unchanged in the library
  - ✓ The revision is tracked at document level with full auditability

  Each document update creates a new document revision number, allowing FDA to track:

  - ✓ The clause versions used at generation time
  - ✓ Any clause revisions made during negotiation or post-generation editing

- Version Control & Lifecycle Management

  FDA provides comprehensive lifecycle management for clauses including:

- ✓ Full version history for clause versions & clause revisions
- ✓ Search across clauses
- ✓ Clause version and clause revision usage analysis

- Clause & Document Template Approval Processes

  Approval workflows ensure that:

  - ✓ New or updated clause versions must be approved before use
  - ✓ Templates are governed prior to automated generation
  - ✓ Compliance and legal oversight are enforced consistently

- Integration with Framesoft Online Negotiation (FON)

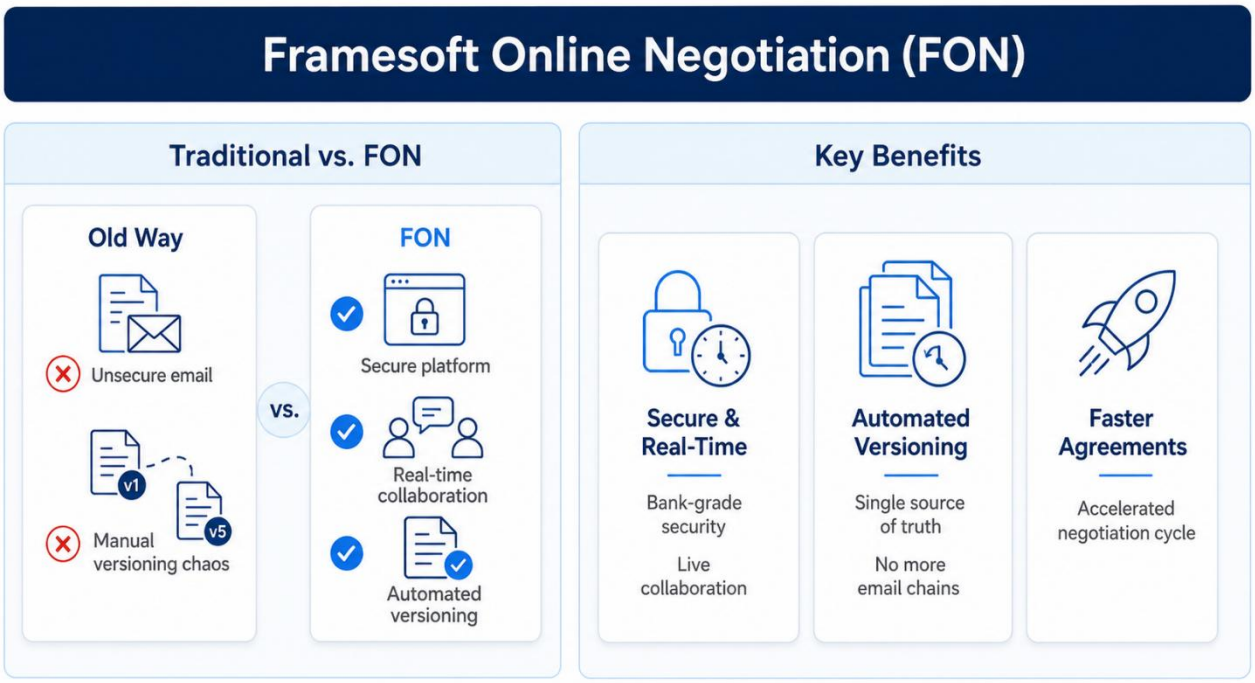
  FDA integrates seamlessly with Framesoft Online Negotiation (FON), enabling negotiation, redlining, and agreement finalization on documents generated from FDA document templates.

4.3 Framesoft Online Negotiation (FON)

Framesoft Online Negotiation (FON) is a secure, real-time digital negotiation platform designed to replace traditional, inefficient contract negotiation processes based on multiple Microsoft Word files, manual version handling, and unsecure email exchanges.

FON enables organizations to electronically assemble, generate, review, and negotiate contracts within a single, governed environment. Multiple internal and external parties can work on the same negotiated document in parallel, with full transparency, version control, and workflow governance throughout the entire preparation, negotiation, finalization, and post-processing lifecycle

By using FON, the complete agreement preparation and negotiation process becomes simpler, faster, and significantly more transparent—without compromising control, compliance, or auditability.



4.3.1 End-to-End Digital Negotiation Lifecycle

- Preparation of Agreement Negotiation

  FON supports flexible contract preparation, allowing negotiation leaders to:

  - ✓ Upload a generated contract draft directly from Framesoft Contract Repository (FCR) and Framesoft Document Assembly (FDA)
  - ✓ Introduce agreement templates directly into FON (including copy & paste from MS Word when required)
  - ✓ Organize standard templates in a central library available to authorized users
  - ✓ Invite counterparties electronically to participate in the negotiation
  - ✓ Conduct negotiations involving multiple parties

This ensures a consistent and controlled starting point for every negotiation.

- Agreement Negotiation (Real-Time & Parallel Collaboration)

  FON enables real-time, structured contract negotiation without file exchanges:

  ✓ A designated negotiation leader manages the process as principal or agent
  ✓ Negotiations are fully workflow-controlled
  ✓ Changes are marked using distinct colors and can be accepted or rejected explicitly
  ✓ Full version history is maintained automatically
  ✓ Comments can be added by all parties and shared selectively or globally
  ✓ Clause locking prevents conflicts and enables simultaneous parallel work

  All participants collaborate directly on the same document, eliminating email-based revisions and manual merge efforts.

- Agreement Finalization & Sign-Off

  Once negotiations are completed, FON supports:

  ✓ Automated removal of mark-ups and change history
  ✓ Removal of internal and external comments
  ✓ Generation of a clean execution copy
  ✓ Electronic signature workflows
  ✓ Secure distribution of the execution copy to counterparties via email or preferred channels

  This ensures a controlled and professional transition from negotiation to legally binding execution.

- Agreement post-processing

  After execution, FON ensures seamless downstream processing:

  ✓ Archiving of the executed agreement in the archive system (e.g., Framesoft Document Management – FDM)
  ✓ Reconciliation of agreement data point changes back into FCR for further processing and netting evaluation
  ✓ Storage of negotiated clauses in FON's Clause Library for reuse in future negotiations

  This closes the loop between negotiation, contract repository, and risk or reporting systems.

4.3.2 Platform Capabilities & Integration

- Seamless Integration with Framesoft Ecosystem

  FON is fully integrated with Framesoft Contract Repository (FCR), supporting:

  ✓ Any agreement request workflow
  ✓ Agreement-type-specific data points
  ✓ Automated draft generation via Framesoft Document Assembly (FDA)

  Negotiations are therefore always aligned with internal data, workflows, and governance standards.

- Secure & fast Counterparty invitation

  Invited counterparties only require internet access to participate securely.

- Intelligent Contract Processing

  FON can be enhanced with Framesoft AI modules to support:

  ✓ Clause comparison and evaluation
  ✓ Clause categorization and classification
  ✓ Data point detection, extraction, and reconciliation

  This enables efficient negotiation even for third-party contracts, including AI-based clause matching against the internal clause repository.

4.3.3 Business Value

By replacing document-centric negotiation with a collaborative, workflow-driven platform, Framesoft Online Negotiation delivers:

- Elimination of manual file handling and version chaos
- Secure, real-time, multi-party collaboration
- Full transparency and auditability across negotiations
- Faster turnaround times and reduced operational risk
- Consistent extraction of contractual data for risk, collateral, and regulatory reporting

FON is scalable across all contract types and is designed to become the industry-leading platform for negotiating commercial and master agreements in complex, regulated environments.

4.4 Framesoft Artificial Intelligence (FAI)

Contracts Simplified – Risks Reduced – Insights Unlocked

Framesoft Artificial Intelligence (FAI) transforms contract documents into governed, structured, and actionable information. Fully integrated with the Framesoft Contract Management platform and the Framesoft Contract Repository (FCR), FAI helps organizations understand, validate, create, negotiate, and manage contracts with greater speed, accuracy, and transparency. From the initial ingestion of a document to its validation, reconciliation, drafting, and negotiation, FAI supports the entire contract lifecycle. Its AI-powered capabilities are embedded across the FCR user interface, giving users contextual assistance wherever they work.

4.4.1 Contract Document Analysis

FAI automates the processing and analysis of contracts, amendments, annexes, schedules, and related documents in all major formats. Documents can be uploaded individually or processed in batches, enabling both day-to-day contract operations and large-scale portfolio reviews.

- OCR and AI-Based OCR Optimization

  Optical Character Recognition (OCR) converts scanned documents, images, and image-based PDFs into machine-readable and searchable text. FAI enhances conventional OCR with a proprietary quality-assurance mechanism. The quality of the recognized text is assessed before downstream analysis begins. Where necessary, AI-driven OCR optimization applies contextual analysis and document enhancement to address unreadable or incorrectly recognized content. This helps establish a reliable textual foundation for subsequent classification, extraction, validation, and semantic analysis.

- Contract Validation and Data Item Extraction

FAI identifies agreement types, document structures, clauses, and legal context across master agreements and their associated amendments, annexes, and schedules. Agreement-specific data items can be extracted automatically, including:

- ✓ Counterparty and bank legal entity
- ✓ Governing law
- ✓ Termination provisions
- ✓ Collateral arrangements
- ✓ Netting clauses
- ✓ Regulatory classifications
- ✓ Agreement dates and references
- ✓ Other configurable contractual terms

Extracted information is validated against the applicable FCR agreement structure, data definitions, constraints, and permitted values. FAI can dynamically generate agreement-specific validation questions to support controlled user review. Beyond predefined fields, FAI identifies relevant contractual information that is not yet represented in FCR. These additional insights can support the continuous development of the organization's contractual data model.

- Reconciliation with FCR

  Following extraction and validation, FAI reconciles document content with the corresponding agreement data held in FCR. Differences, inconsistencies, missing values, and other anomalies are identified, prioritized, and presented through dedicated comparison views. Users can review and approve proposed changes before information is written back to FCR. Where no corresponding agreement or annex exists, FAI can initiate the creation of a new FCR record. This human-in-the-loop approach combines automation with transparency, control, and full auditability.

4.4.2 Talk to FCR – Smart Search and Semantic Retrieval

Talk to FCR enables users to search, explore, and analyze contractual information using natural language. Unlike conventional keyword searches, semantic retrieval considers the meaning and legal context of a question. It can identify relevant information even when the terminology used in a contract differs from the wording of the user's query.

Users can interactively ask questions about individual agreements, documents, clauses, counterparties, or broader contract portfolios. FAI retrieves the relevant information from FCR and its associated documents, helping users locate contractual knowledge faster and make more informed decisions.

Potential use cases include:

- Locating contracts with specific termination or collateral provisions
- Identifying agreements governed by a particular jurisdiction
- Comparing related clauses across multiple contracts
- Finding documents affected by a regulatory requirement
- Summarizing contractual obligations, risks, or negotiated changes

4.4.3 Automated Contract Creation and Drafting

FAI supports the automated creation and updating of contractual documents using trusted information maintained in FCR. Verified agreement data can be applied to approved templates, clause libraries, and drafting rules. Intelligent clause assembly and natural-language generation help produce documents that are consistent with the organization's legal standards and governance requirements.

FAI can assist with:

- Generating new contracts from approved templates
- Prepopulating documents with validated FCR data
- Selecting clauses based on agreement type and context
- Updating existing documents following contractual changes
- Producing amendments, annexes, and related documents
- Summarizing or translating contractual content

By connecting repository data directly with document production, FAI closes the loop between contract analysis, validation, and creation.

4.4.4 Legal Opinion Analysis

FAI supports the structured ingestion, review, comparison, and management of legal opinions. It can analyze legal opinions alongside the contracts, entities, jurisdictions, and regulatory classifications to which they relate. Relevant conclusions, assumptions, qualifications, limitations, and follow-up requirements can be identified and made accessible through FCR.

AI-assisted comparison helps users detect differences between opinions, assess their potential impact, and identify opinions that may require review or renewal. Follow-up activities can be incorporated into configurable workflows, improving oversight and supporting a consistent, auditable legal-opinion management process.

4.4.5 AI-Assisted Contract Negotiation

FAI assists legal and business users throughout the contract negotiation process. Contract drafts and proposed changes can be analyzed against approved clauses, negotiation guidance, contractual standards, and available repository data. FAI can help identify deviations, assess potential risks, explain the implications of proposed wording, and suggest suitable alternatives for review.

Negotiation support can include:

- Clause and redline analysis
- Identification of deviations from approved language
- Risk assessment and issue prioritization
- Suggested fallback or alternative wording
- Comparison with previous agreements and negotiated positions
- Summaries of proposed and accepted changes
- Guidance based on applicable negotiation rules

The objective is not to replace legal judgment, but to give users faster access to relevant information and consistent decision support during negotiations.

4.4.6 AI Assistant Across the FCR User Interface

FAI-based AI Assistant functionality is available across the FCR user interface. Rather than operating as a separate tool, the assistant provides contextual support within the screens and processes where users already manage their contracts. Depending on the user's current context, the assistant can help retrieve information, explain contract data, summarize documents, validate extracted values, compare clauses, support drafting, and initiate appropriate follow-up actions. This embedded approach makes AI assistance accessible throughout the contract lifecycle while preserving existing FCR permissions, workflows, governance controls, and audit trails.

4.4.7 Enterprise-Grade AI Governance and Integration

FAI combines advanced AI capabilities with enterprise-grade control. Multiple AI models can analyze documents in parallel, with results consolidated through quorum-based validation. Cross-validation between independent models improves consistency and reduces dependence on the output of a single model. All analytical results can be incorporated into configurable FCR workflows covering validation, review, approval, reconciliation, agreement updates, and compliance reporting. Users remain in control of material decisions, while the relevant actions and outcomes remain transparent and auditable.

Business Value

By converting unstructured contract content into governed data and actionable insights, FAI enables organizations to achieve:

- Significant efficiency gains and cost reductions
- Improved contract-data accuracy and completeness
- Reduced operational, legal, and compliance risk
- Faster access to contractual information
- Consistent, governance-aligned contract drafting

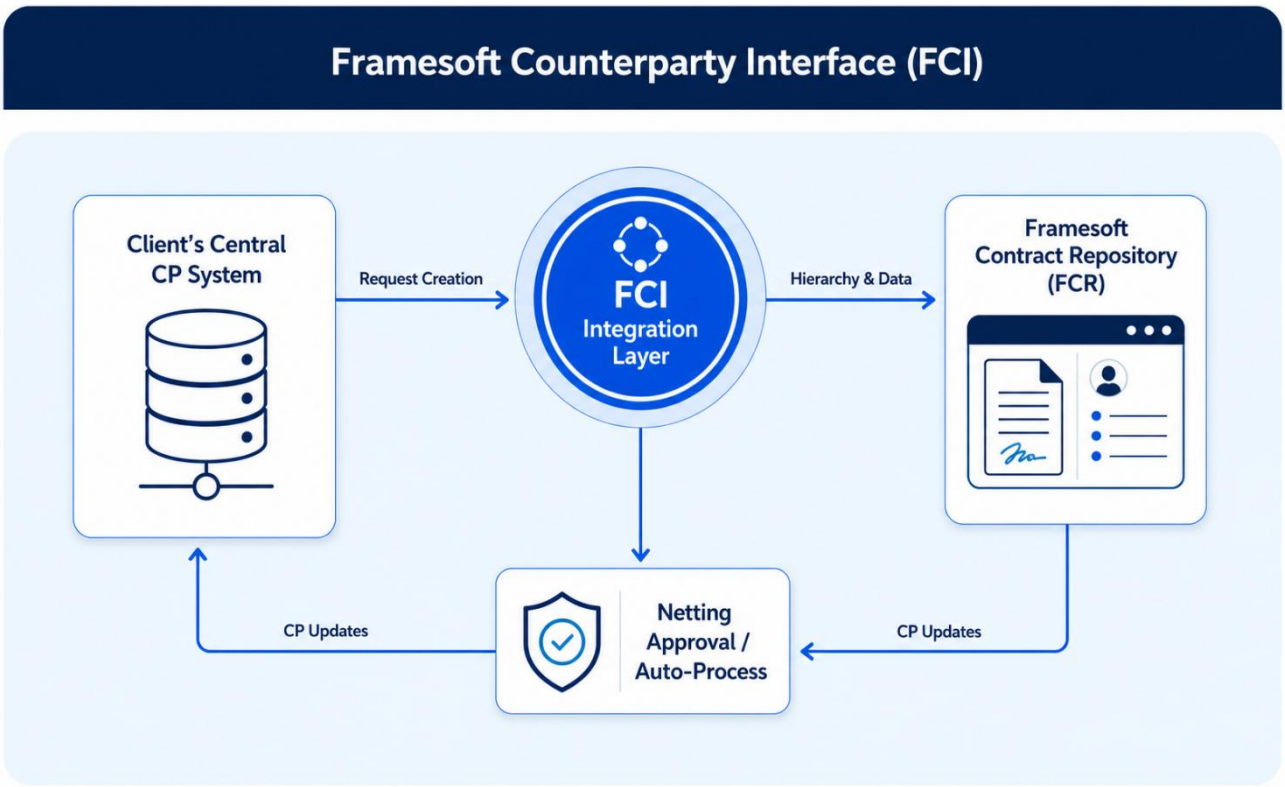
- More efficient and informed negotiations
- Scalable analysis across entire contract portfolios
- Enhanced visibility and strategic decision support

Framesoft Artificial Intelligence brings together document intelligence, semantic retrieval, contract generation, negotiation assistance, and contextual AI support within a single integrated environment.

4.5 Framesoft Counterparty Interface (FCI)

The Framesoft Counterparty Interface (FCI) is an add-on module that extends the Framesoft Contract Repository (FCR) with advanced capabilities for the controlled exchange, synchronization, and governance of counterparty data between FCR and a client's central counterparty system.

FCI establishes a standardized and auditable integration layer that supports both FCR-initiated requests (e.g., creation of new counterparties in the central system) and externally driven counterparty updates, ensuring data consistency, transparency, and compliance across systems.



4.5.1 Core Functional Principles

FCI supports the following fundamental interaction patterns:

- FCR-Initiated Requests

  FCR can request the creation or enrichment of counterparties in the client's central counterparty system (e.g., as part of a master agreement onboarding process).

- Provision of Counterparty Information

  Requested counterparty data, including structural and classification information, is provided back to FCR and processed in accordance with defined rules and workflows.

- Ongoing Counterparty Updates

  Updates originating from the central counterparty system are continuously synchronized with FCR via FCI.

4.5.2 Functional Capabilities

FCI provides the following key functionalities:

- Action Management Based on Incoming Updates

  FCI manages and orchestrates actions triggered by:

- ✓ Updates received from the central counterparty system, or
- ✓ Counterparty information provided in response to FCR requests actions are executed based on predefined business rules and governance settings.

- Automatic Processing of Non-Netting-Relevant Updates

  Counterparty updates that do not impact on netting (e.g., address changes, contact details) are applied automatically in FCR. Relevant FCR users are notified accordingly.

- Controlled Processing of Netting-Relevant Updates

  Counterparty updates with potential netting implications can be:

  - ✓ Applied automatically while preserving netting-relevant attributes (e.g., *Form of Organization*), or
  - ✓ Routed through an approval workflow

    In all cases, FCR users are informed, and approval is required where netting eligibility may be affected.

- Counterparty Hierarchy Management

  Counterparty hierarchy information (e.g., legal entities, branches, parent–child relationships, underlying principals) is provided via FCI and processed within FCR. This ensures that hierarchical structures are consistently maintained and correctly reflected for contract coverage, netting analysis, and risk-related processes.

- FCR Screen extensions & dedicated FCI screens

  FCI provides dedicated FCR screen extensions and user interfaces to:

  - ✓ Review incoming counterparty updates
  - ✓ Monitor processing status
  - ✓ Approve netting-relevant changes
  - ✓ Ensure transparency and auditability

4.5.3 Integration Flexibility

FCI can be adapted to a client's preferred integration and information exchange mechanisms, including but not limited to:

- Web-Services
- REST APIs
- Message Queues
- Batch-based file exchanges

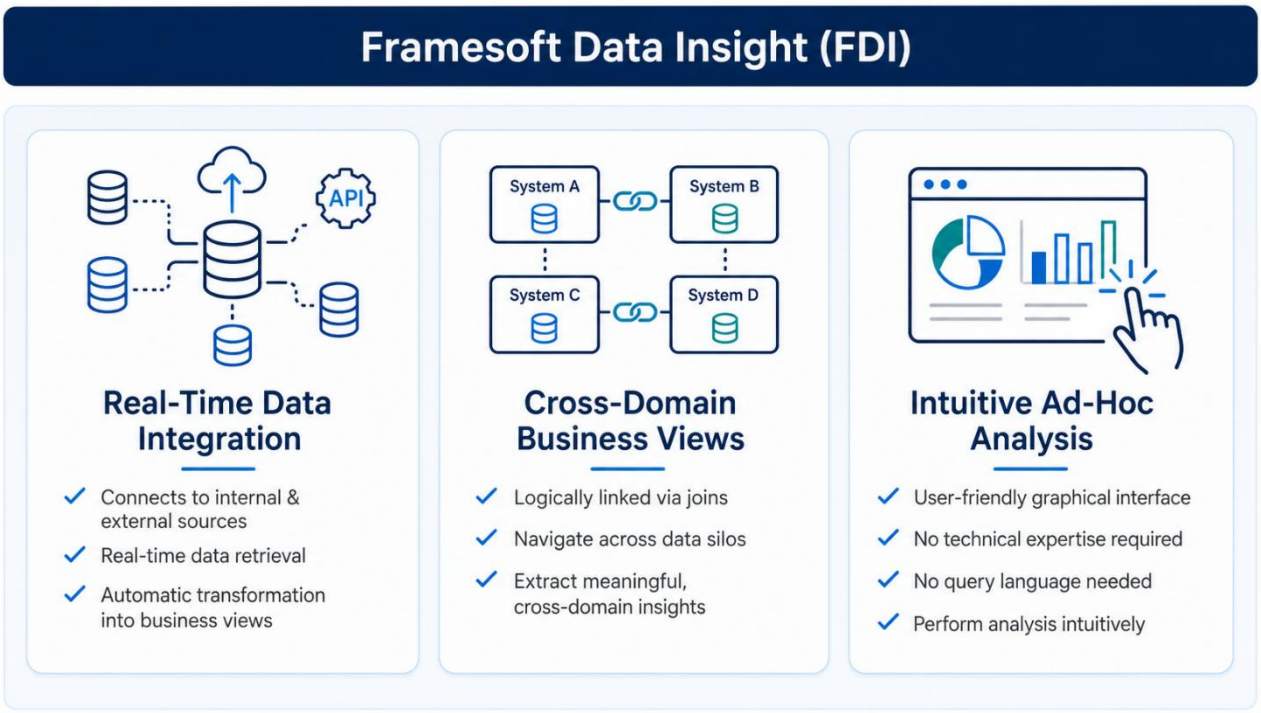
This flexibility allows seamless alignment with existing enterprise architectures and data governance models.

The Framesoft Counterparty Interface (FCI) enables controlled, auditable, and rule-based synchronization of counterparty and hierarchy data between FCR and central counterparty systems—ensuring data consistency, protecting netting integrity, and supporting efficient contract onboarding and lifecycle management.

4.6 Framesoft Data Insight (FDI)

FDI connects directly to internal and external data sources, retrieves data in real time, and automatically transforms it into consistent business views. These business views—originating from multiple systems—can be logically linked via joins, enabling users to navigate across data silos and extract meaningful, cross-domain insights.

Business users can perform ad-hoc analysis intuitively, without requiring technical expertise or learning a query language. All analytical capabilities are exposed through a graphical, user-friendly interface designed for immediate productivity.



4.6.1 Seamless Integration

FDI is fully integrated into the Framesoft solution landscape (e.g., Framesoft Contract Repository – FCR) and can also be accessed via a browser-based application. Users benefit from a universally accessible and flexible toolset to analyze data, configure reports, and create visualizations and dashboards on the fly.

The integrated charting engine supports graphical representation of reports and analytics. In addition, reports defined in the Framesoft Report Generator (FRG) can be generated instantly as FDI reports, ensuring consistency across operational and analytical reporting.

4.6.2 Data Extraction & Presentation

FDI supports powerful yet intuitive data operations, including filtering, grouping, aggregation (sum, average, etc.), and presentation in configurable pivot tables based on user-defined row and column criteria.

By leveraging FDI, organizations place business users firmly in control of their data analysis and reporting requirements. Furthermore, FDI can be combined with Framesoft Artificial Intelligence (FAI) and advanced analytics to support:

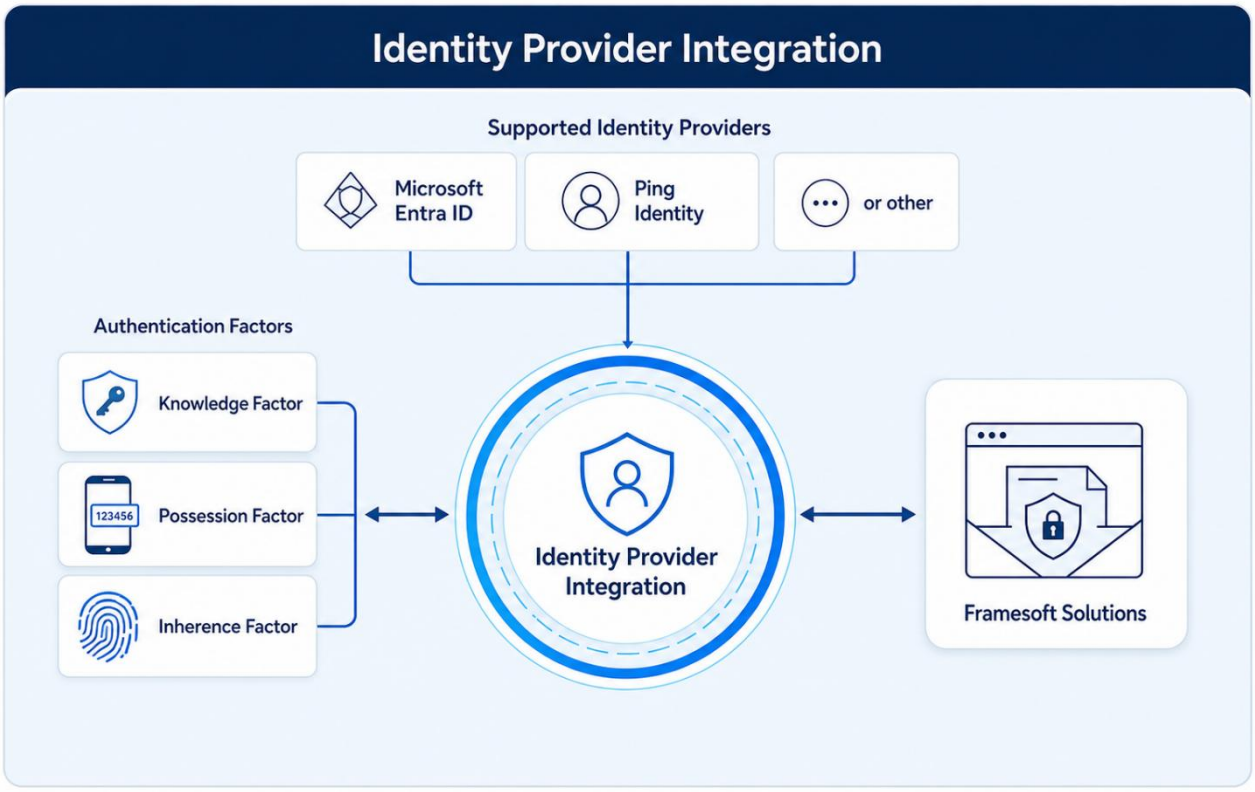
- deriving deep insights from document and contract repositories
- supporting document and contract review and creation processes
- identifying critical document sets requiring manual review

FDI is designed to maximize the value of existing data lakes and enterprise data assets, seamlessly integrating with the Framesoft tools and platforms already in use and fully leveraging the benefits of Framesoft's unique Application Framework.

4.7 Framesoft Advanced Security (FAS)

Framesoft Advanced Security (FAS) is an enterprise-grade security add-on that protects access to Framesoft solutions through multi-factor authentication (MFA) and modern identity provider integration. It significantly strengthens the security posture of organizations by enforcing layered authentication controls and reducing the risk of unauthorized access, credential abuse, and cyber threats.

FAS follows the principle of defense in depth, extending beyond traditional password-based authentication by combining multiple independent verification factors.



4.7.1 Multi-Factor Authentication Model

FAS supports standard MFA factors, including:

- Knowledge factors

  e.g., passwords or PINs
- Possession factors

  e.g., security tokens, authenticator apps, smart cards
- Inherence factors

  e.g., biometric authentication such as fingerprint or facial recognition

This flexible model allows organizations to balance strong security requirements with a seamless user experience.

4.7.2 Identity Provider Integration (SSO)

FAS integrates seamlessly with leading enterprise identity providers, including:

- Microsoft Entra ID (Azure AD)
- Ping Identity (PingID / PingFederate)
- Other

Through standards FAS enables:

- Single Sign-On (SSO) across Framesoft applications
- Centralized identity, role, and access management
- Enforcement of conditional access and MFA policies
- Secure token-based authentication and authorization

User identities, groups, and roles can be mapped directly from the identity provider to Framesoft applications, supporting role-based access control (RBAC) and regulatory compliance.

4.7.3 Governance, Monitoring & Compliance

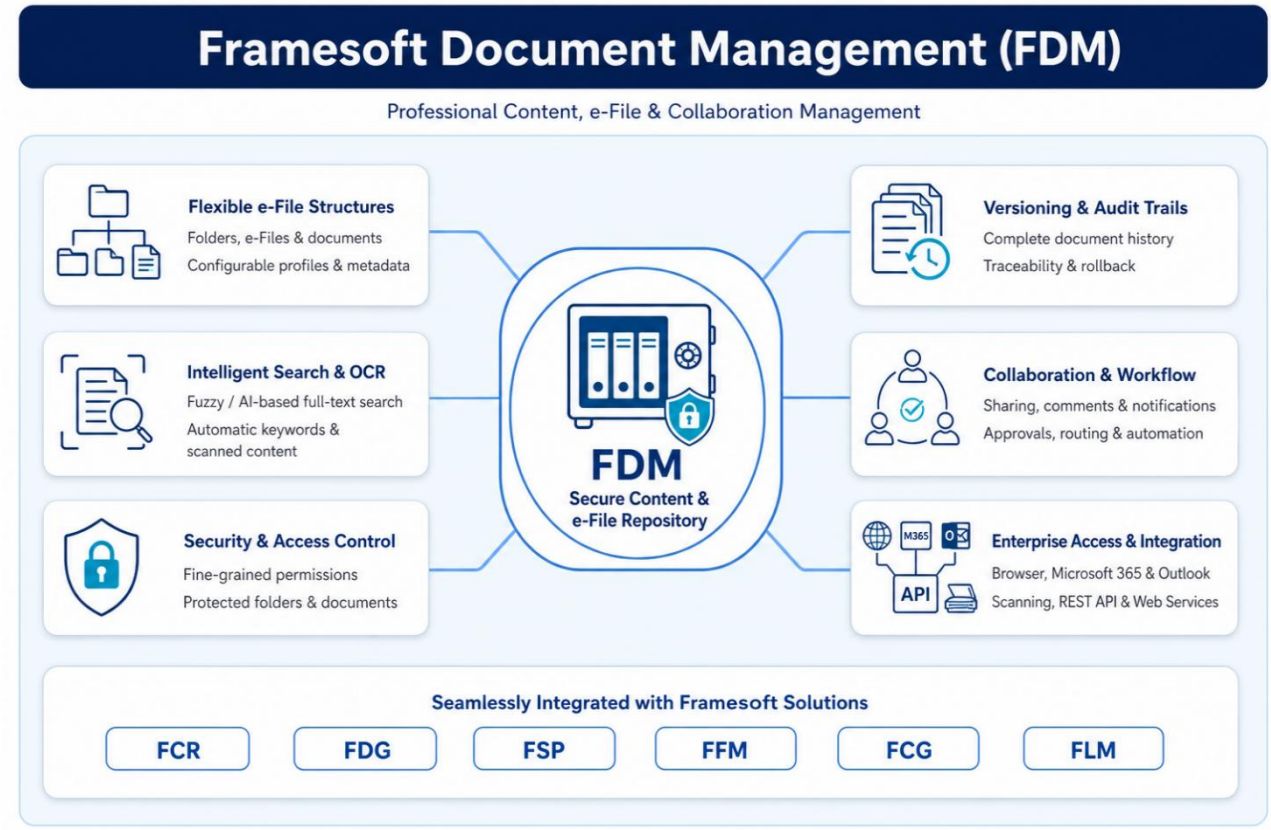
FAS supports enterprise security and compliance requirements through:

- Centralized authentication and authorization
- Integration with identity provider logging and monitoring
- Secure session and token handling
- Alignment with regulatory standards in financial services and other regulated industries

Framesoft Advanced Security (FAS) delivers a robust, standards-based security framework by combining multi-factor authentication with seamless integration into enterprise identity providers such as e.g., Entra ID and Ping Identity—ensuring secure, compliant, and user-friendly access to all Framesoft solutions.

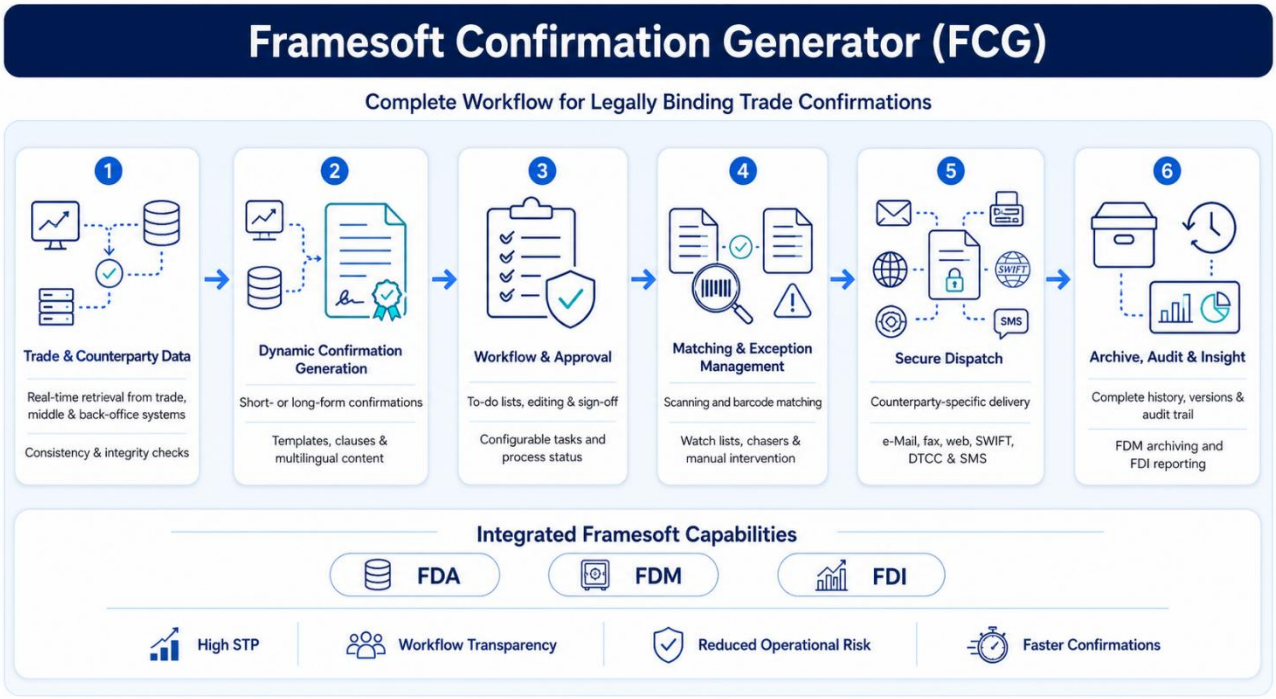
5 Framesoft Solutions seamlessly integrated with FCM

5.1 Framesoft Document Management (FDM)



Framesoft Document Management (FDM) is a software solution for professional & global content and collaboration management. FDM is designed to streamline the process of managing documents in a digital environment, enhancing both efficiency and security in an organization. FDM allows managing all types of electronic content. Content can be easily stored, tracked & searched via fuzzy / AI based full text search or by assigning keywords automatically. FDM involves a set of tools to create, manage, and store electronic documents in a centralized location, enabling easy access via multiple channels, retrieval, sharing, and collaboration.

5.2 Framesoft Confirmation Generator (FCG)



Framesoft Confirmation Generator (FCG) supports financial institutions in the process of the configuration, production, management, and administration of legally binding trade confirmations (short or long form) for all kinds of financial instruments (e.g., Over-The-Counter financial instruments such as interest rate, credit and equity derivatives, repo, and securities lending, etc.).

FCG supports the complete workflow associated with generating, adapting, and releasing confirmations. Various Delivery Chanels can then dispatch confirmations.

6 FCM Integration

FCM can be connected to a broad range of corporate and external systems through FCR Agreement API and interfaces.

Typical integration targets include:

- Counterparty and client master data systems for counterparty creation, updates, hierarchy information, branches, legal entities, and classifications.
- CRM systems to exchange customer, relationship, onboarding, and contract status information.
- Risk management systems to provide agreement, product coverage, netting, collateral, and enforceability information.
- Collateral management systems to support collateral eligibility, CSA-related data, and collateral netting information.
- Trading and front-office systems to exchange product, transaction, counterparty, and agreement coverage information.
- Regulatory reporting systems to provide structured contract data required for reporting and compliance purposes.
- Document management and archive systems for storage, retrieval, and archiving of contracts, amendments, annexes, legal opinions, and supporting documents.
- Electronic signature platforms such as DocuSign to send execution copies for signature and receive back signed documents and envelope information.
- Identity and access management systems such as Microsoft Entra ID or Active Directory for SSO, user provisioning, group-based permissioning, and access management.
- Data warehouses, reporting platforms, and BI tools for downstream analytics, reporting, KPI monitoring, and management dashboards.
- ERP or procurement systems where contractual information needs to be exchanged with procurement, vendor, or finance processes.
- E-mail and notification services for workflow notifications, reminders, alerts, and process communication.

FCM supports integration through multiple mechanisms, including REST APIs, web services, SOAP, XML, JSON, message queues, file exchange, database views, interface tables, and data feeds.

This enables FCM to operate as an integrated contract lifecycle management platform within the client's enterprise architecture, while maintaining FCR as the central system of record for contract data, lifecycle status, workflow information, and related contractual documentation.

7 Deployment Option

Framesoft Contract Management (FCM) has been designed as a flexible enterprise platform that can be deployed in different operating models to align with an organization's IT strategy, security requirements, regulatory obligations, and operational governance. Regardless of the selected deployment model, the functional capabilities of the FCM platform and its optional extensions remain consistent.

7.1 Customer-Hosted (On-Premises)

FCM can be deployed within the customer's own data centre, where the customer owns and operates the complete infrastructure stack.

Under this model:

- The customer manages the infrastructure, operating systems, databases, network, backup, disaster recovery, and operational monitoring.
- Framesoft provides application software, implementation services, deployment packages, maintenance releases, and application support.
- Authentication can be integrated with the customer's enterprise identity provider (e.g., Microsoft Entra ID).
- The solution integrates with the customer's existing enterprise systems and security infrastructure.

This deployment model is typically selected by organizations with strict infrastructure governance and regulatory requirements.

7.2 Customer-Controlled Cloud

FCM can be deployed within a customer-controlled cloud environment, such as Microsoft Azure or Amazon Web Services (AWS), where the customer retains ownership and operational control of the cloud subscription and infrastructure.

Under this model:

- The customer controls the cloud tenant, networking, security policies, identity management, monitoring, backup, disaster recovery, and data residency.
- Framesoft provides application software, implementation, configuration, application maintenance, and product support.
- FCM integrates with the customer's cloud-native security, monitoring, and operational services.
- Enterprise identity providers, including Microsoft Entra ID, are fully supported.

This model combines the flexibility of cloud infrastructure with the customer's enterprise governance and security framework.

7.3 Framesoft SaaS

FCM is also available as a fully managed Software-as-a-Service (SaaS) solution hosted by Framesoft on Amazon Web Services (AWS).

Under this model:

- Framesoft operates the complete application environment.
- Framesoft is responsible for infrastructure management, monitoring, backup, disaster recovery, maintenance, and operational support in accordance with the agreed Service Level Agreement (SLA).
- Customers access the solution securely via enterprise authentication mechanisms, including Microsoft Entra ID integration.
- Enterprise integrations are implemented through the standard FCM API framework or interfaces.

The SaaS model provides a fully managed service while maintaining the same enterprise functionality and security capabilities as customer-managed deployments.

7.4 Deployment of FCM Extensions

All optional FCM extensions are deployed within the same architectural environment as the core FCM platform and therefore inherit the selected deployment model.

7.5 Operational Consistency

Irrespective of the chosen deployment model:

- The functional capabilities of FCM remain unchanged.
- The same APIs and integration framework are available.
- Enterprise authentication and role-based access control are supported.
- Audit trails, workflow management, reporting, and lifecycle management operate consistently.
- Customer-specific configurations, workflows, templates, and business rules are preserved.
- Annual major product releases, maintenance updates, and security patches are available for all deployment models.

The principal differences between the deployment options relate to ownership of the infrastructure and operational responsibilities, rather than to application functionality. This enables organizations to select the deployment model that best aligns with their enterprise architecture, security policies, operational model, and regulatory requirements while maintaining a consistent and future-proof contract lifecycle management platform.