

Powering K-C’s digital future



How to Sign   
a Legal Agreement

Coupa

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*For the best learning experience, please click the* ***Editing*** *button and select* ***Open in Desktop*** *to view this document in your desktop application of Microsoft Word. Viewing this document in SharePoint or in-browser may distort the placement of images and text.*

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| Warning outline | **Your screen in Coupa may differ slightly from this training, but the steps to complete the activity will be the same.** |

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|  | **This icon indicates there are further policy or business process details relating to a step. Click on the provided link(s) placed throughout the QRC for more information.** |

## Purpose

This Quick Reference Card (QRC) explains **How to Sign a Legal Agreement**.It is intended to support Legal and Legal Agreement Signatory in executing the following activities:

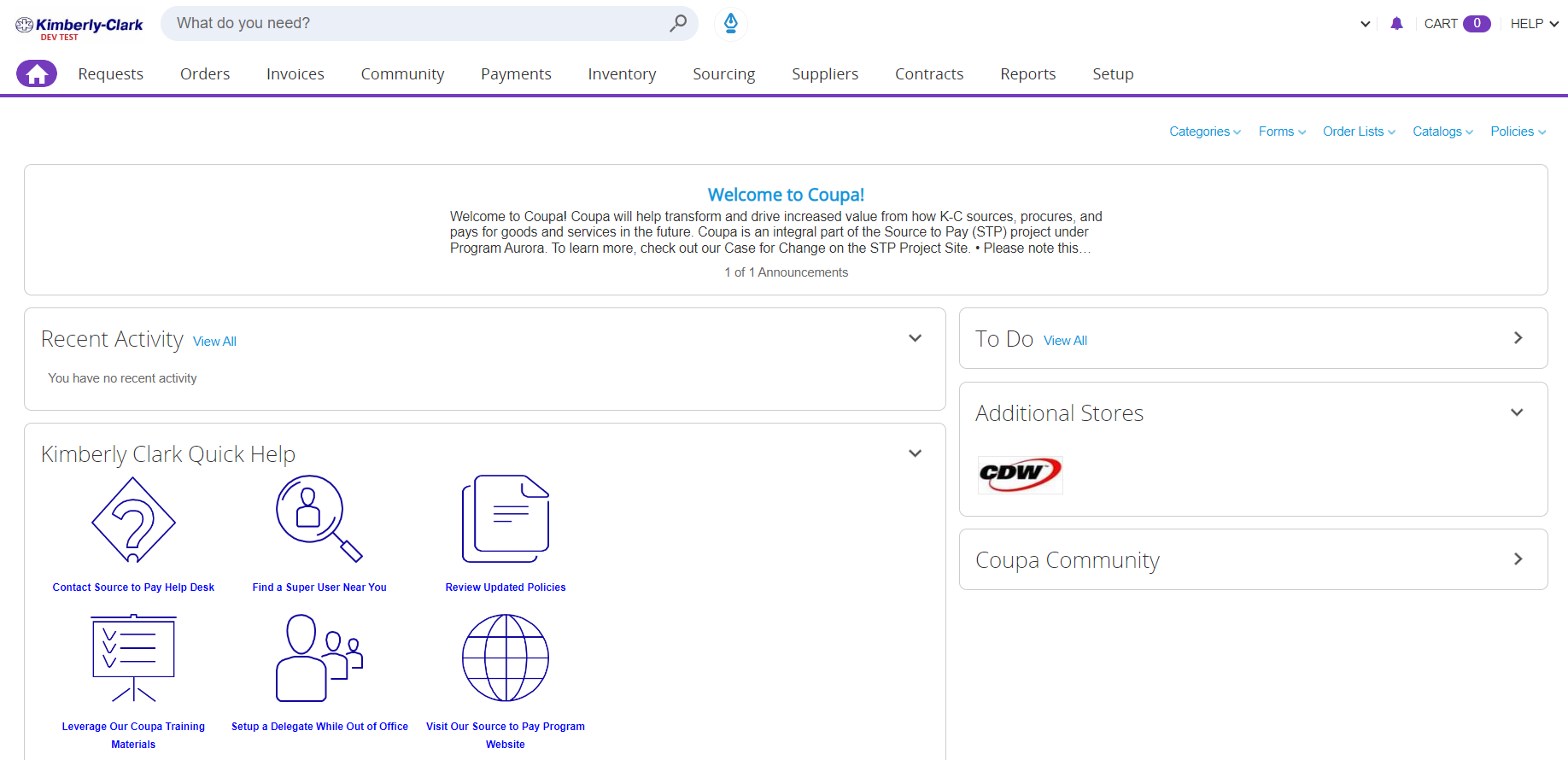
* **Task 1:** How to Sign a Legal Agreement

## Key Terms

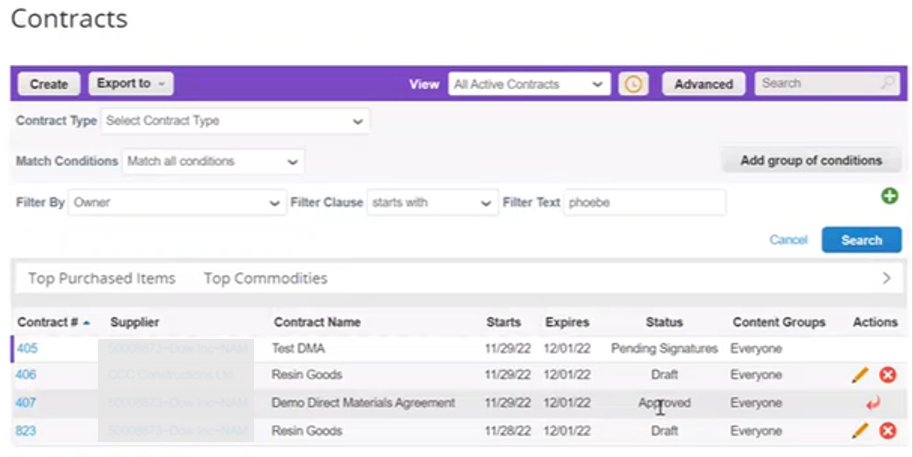
* + The **Approval Chain** is a series of stakeholders who must approve the contract record and linked legal agreement before it can be signed or published.
  + **Contract Approver** is a person who provides approval for some aspect on a Contract Record, which can include Spend Approval, Payment Term Exceptions, and other approvals as required.
  + The **Contract Record Owner** is a person who will receive notifications about contract record renewals and expirations.
  + The **Contract Record Reviewer** are people / teams that are added as ad hoc content reviewers for visibility or notes
  + The **Counterparty** is the supplier or other party on the legal agreement that K-C is negotiating the contract record with.
  + The **Legal Team** is a team that oversees review of legal agreement
  + The **Signatories** are people who sign the legal agreement based on its dollar amount or its equivalent in local currency, and other variables in DocuSign.
  + The **Status** tracks the progression of the contract record stages, which include the following: draft, approvals, and active status.
  + The **Contract Record** is used to store and maintain the contract record metadata and item details. The contract record is required to capture approvals in Coupa, and to also tie to transactional objects downstream (such as a PO).
  + The **Legal Agreement** is a legal document drafted and reviewed with the supplier. A legal agreement is not required to enable a contract record in Coupa for transactions.

## How to Sign a Legal Agreement

1. On the Coupa home screen, click the **Contracts** tab to view the **Approved Contract Record**.
   1. **Note:** All legal agreement signatories will in succession receive an email from DocuSign with the request to provide a signature for the legal agreement.



1. Click on the link to view the **Approved Contract Record**. See the **Status** column to confirm which contract records are **Approved**.
   1. **Note:** *Please view the QRC on* [*How to Approve or Reject Contract Records.*](https://kimberlyclark.sharepoint.com/:w:/r/sites/i797/Learning%20Document%20Library/STP_Coupa_QRC_How%20to%20Approve%20or%20Reject%20a%20Contract%20Record_NA%20EN.docx?d=w3d163e630fa040c8ac18773fee54db41&csf=1&web=1&e=evUjbN)

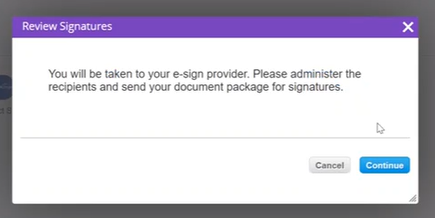


1. After clicking on the **Approved Contract** **Record** link, click **Review Signatures** button, which will trigger the **DocuSign** for signatures.

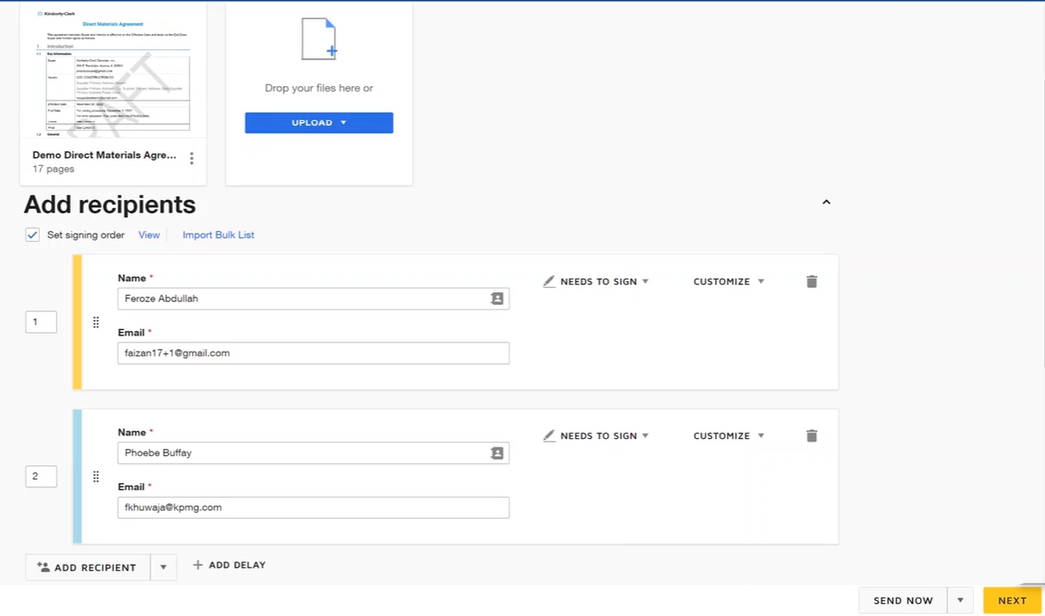
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|  | **Please view the** [**K-C Policy on DOA**](https://kimberlyclark.sharepoint.com/Teams/A526/GPOtechAndProc/PoliciesControls/Approval%20Authority/Forms/AllItems.aspx?OR=Teams%2DHL&CT=1679993718579&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMzAzMDUwMTEwNSIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D) |



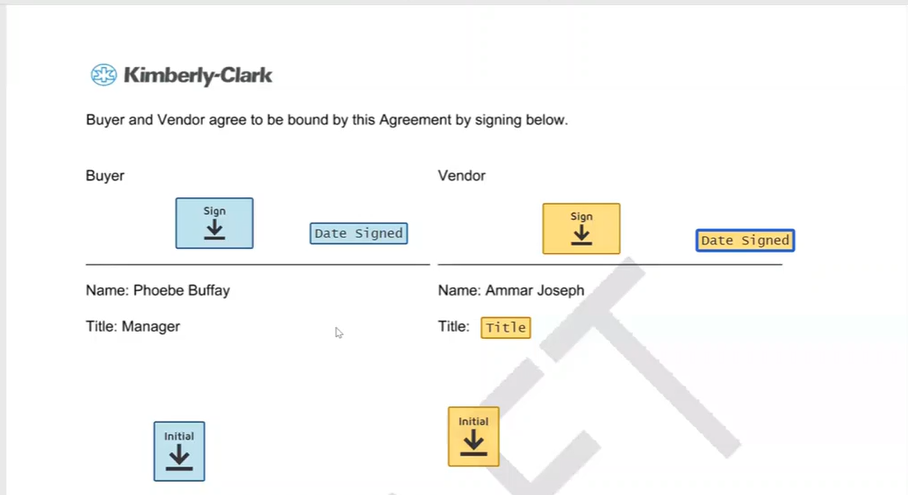
1. A **Review Signatures** message pop-up screen will appear. Read the message and click **Continue**.
   1. **Note:** All legal agreement signatories will have received an email from DocuSign with the direct DocuSign to start the signature process.

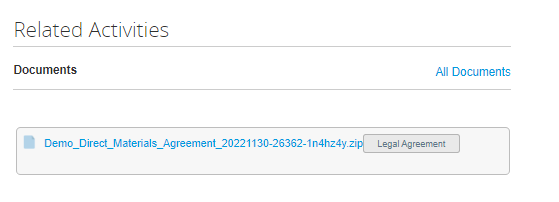


1. Once you select **Continue**, a separate **DocuSign** window will appear. Click the **Set** **signing order** checkbox.
   1. **Note**: For additional guidance on DocuSign please view the DocuSign QRC.
2. To add additional recipients, click the **Add Recipient** drop-down menu.
3. Add the **recipient’s name(s)** and **email address(s)** and select **Needs to Sign**.
   1. **Note:** Please include all the legal agreement signatories information from both the Counterparty and K-C.
4. Click **Next**.



1. After clicking **Next**, verify the details in the agreement. Add in **signature**, **date**, **initial**, or **title boxes** as needed on to the **DocuSign** agreement.



1. Click **Send** once completed.
   1. **Note**: Once the legal agreement is signed by all legal agreement signatories, DocuSign will send a signed copy of the legal agreement to all signatories via email.
   2. **Note**: Once the legal agreement is signed by all legal agreement signatories, the signed legal agreement can also be found under the **Related Activities** tab in the contract record.

## Change Version

|  |  |  |  |
| --- | --- | --- | --- |
| Version History | | | |
| **Version** | **Date** | **Change Description** | **Author** |
| 0.5 | 1/12/2023 | Original | Frederik Terheggen (KPMG) |
| 1.0 | 1/17/2023 | Functional Feedback | Faizan Khuwaja (KPMG) |
| 1.0 | 1/18/2023 | Functional Feedback Incorporated | Frederik Terheggen (KPMG) |
| 2.0 | 1/27/2023 | Round 1 K-C Feedback Incorporated | Frederik Terheggen (KPMG) |
| 3.0 | 2/1/2023 | Round 2 K-C Feedback Incorporated | Frederik Terheggen (KPMG) |
| 4.0 | 2/22/2023 | Round 3 K-C Feedback Incorporated | Erin O’Rourke  (KPMG) |