ContractSafe

What's New in ContractSafe Webinar

November 2026

Here’s what’s new

● Now Available ● In Development

Upload & Import	Request & Intake	Draft & Create	Review & Approve	Sign & Execute	Track & Renew
● Bulk Upload 100 Contracts	● Conditional Fields for Intake Forms and Folder Routing	● Optional Template Fields	● Approval Settings ● New Approvals Workspace ● Advanced Approvals	● eSign Templates	● Reminder Templates ● Reminder Automations

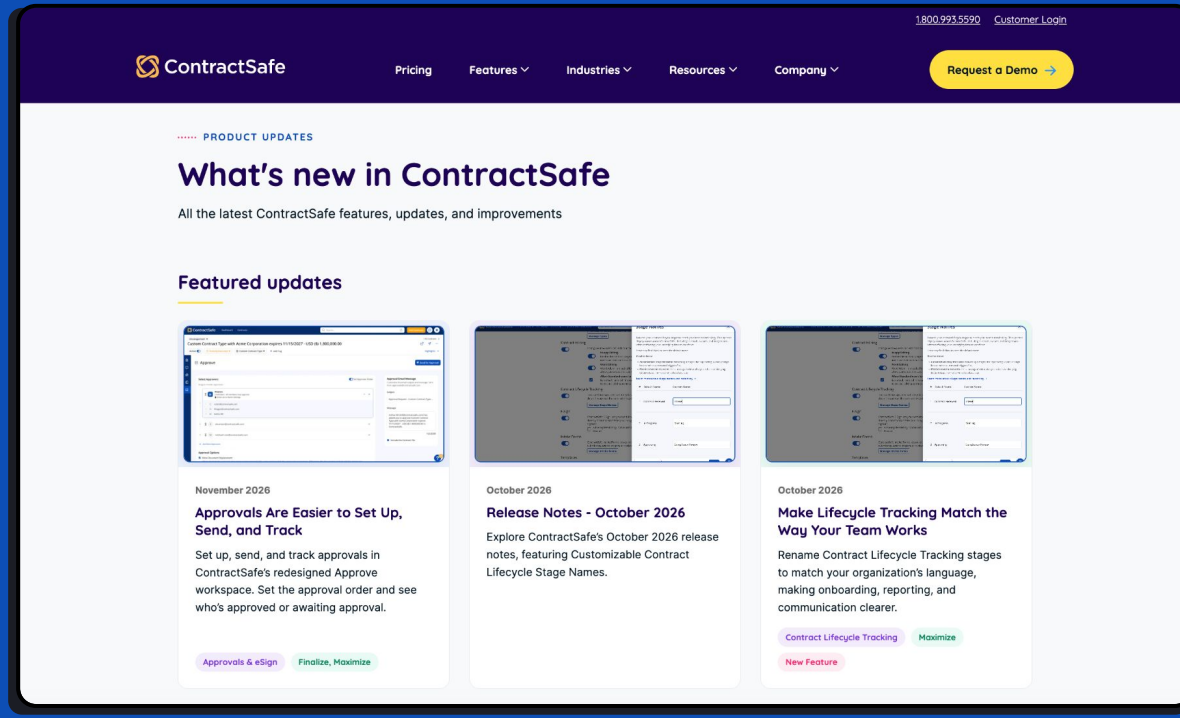
Across the Contract Lifecycle

● Customizable Lifecycle Stage Names ● MCP Connector ● Ask Questions Across Your Contracts

All the latest updates, in one place.

Visit our Product Updates page anytime to see what's new in ContractSafe.

www.contractsafe.com/product-updates

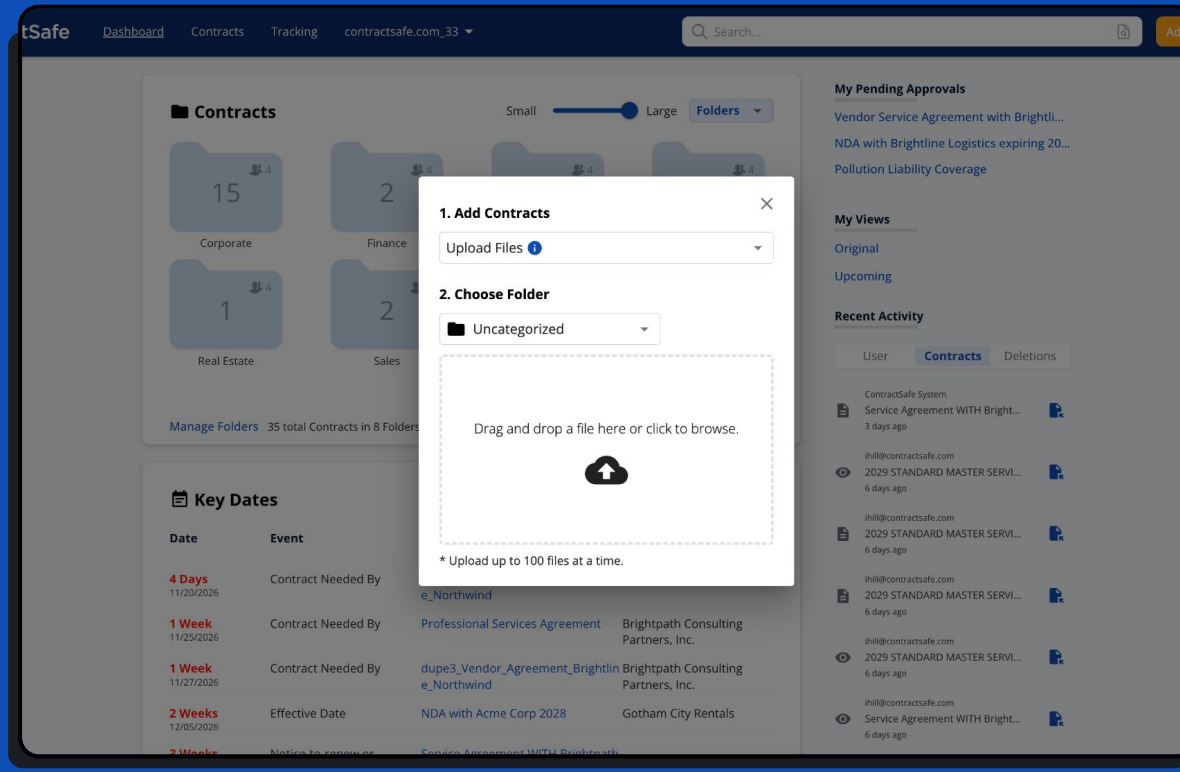


Bulk Upload **NOW AVAILABLE** **ALL PLANS**

Upload 100 contracts at once.

Adding a big batch of contracts used to take several small rounds. Now you can upload up to 100 files at a time, up from 25.

Now you can add more contracts in fewer uploads.



Intake Forms: Conditional Fields

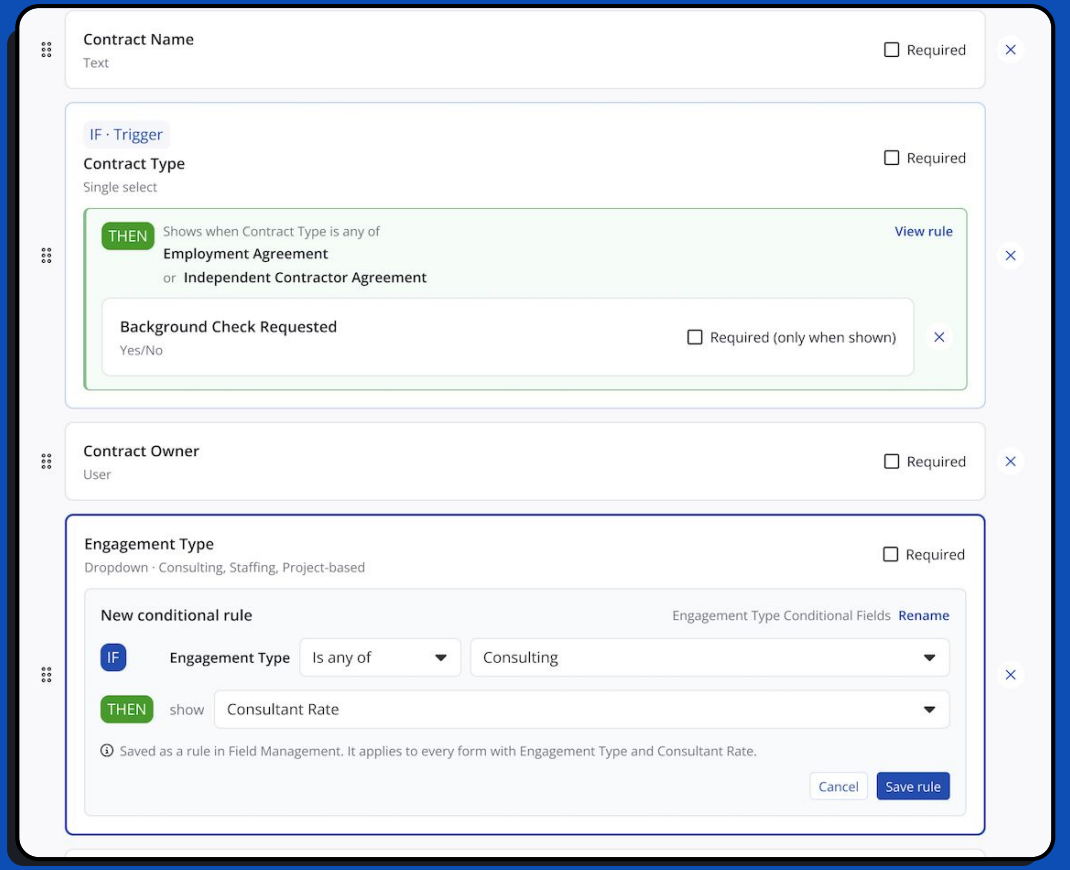
IN DEVELOPMENT

MAXIMIZE

Show or hide fields based on answers.

Keeping a separate intake form for every type of request is a lot to maintain. Fields can now show or hide based on earlier answers, so fewer forms cover more requests.

Fewer intake forms to manage, and requesters only see what applies.

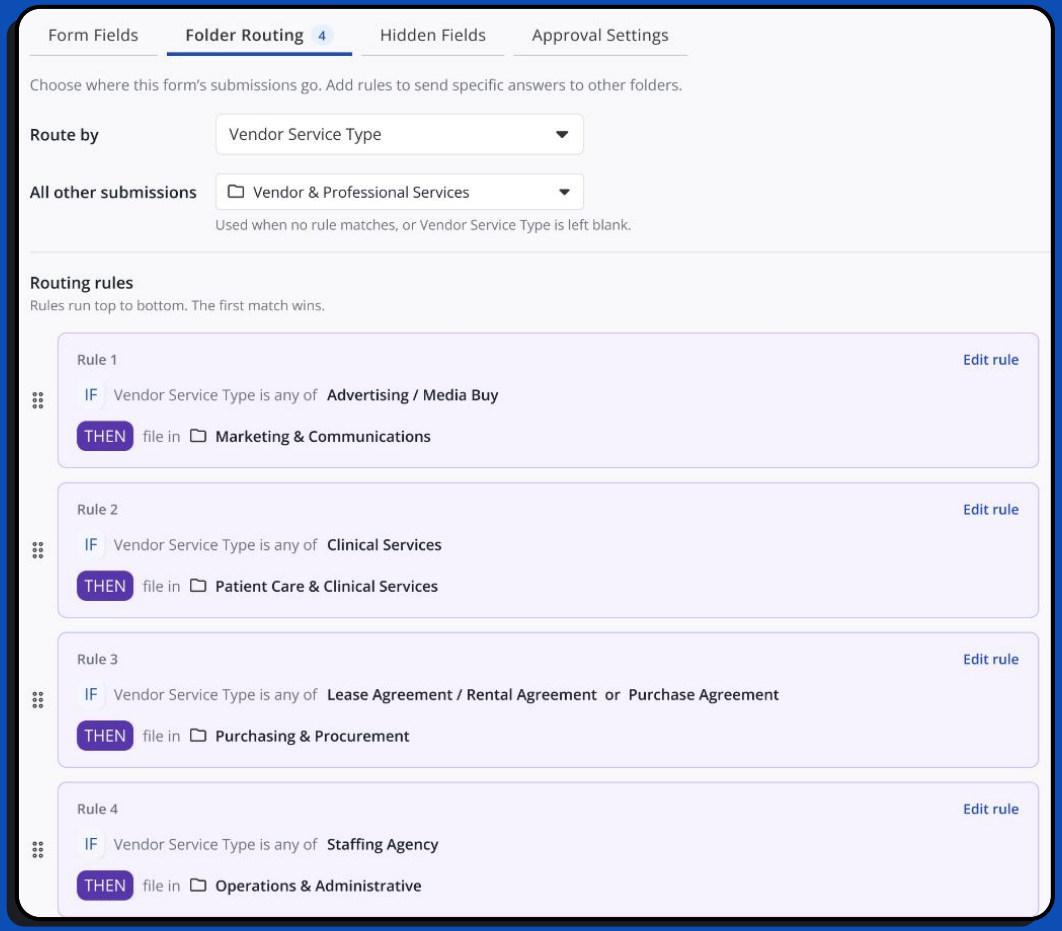


Intake Forms: Automatic Folder Routing IN DEVELOPMENT MAXIMIZE

Automatically route requests to the right folder.

Every submission from an intake form used to land in one folder. Set folder routing rules based on a form field and each submission goes to the right folder.

Less sorting, and every team finds its contracts where it expects them.

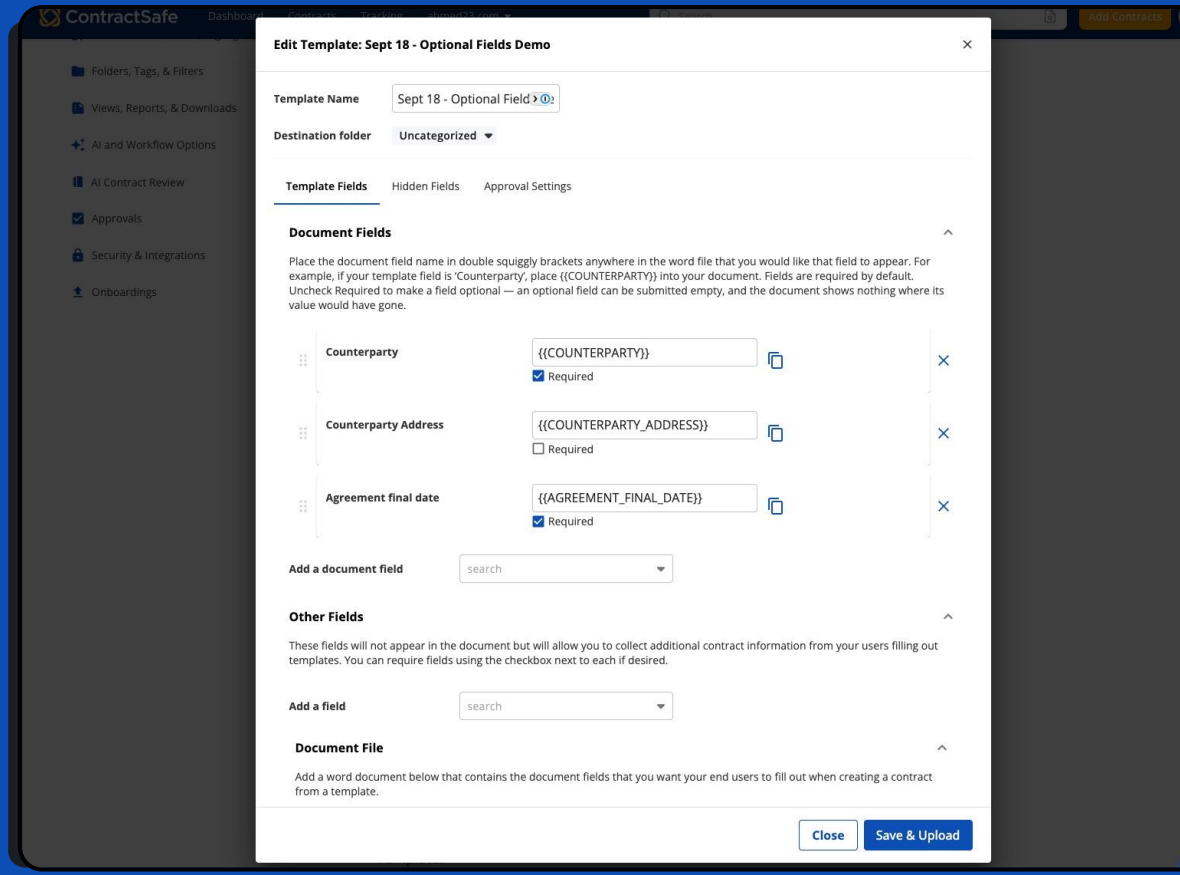


Optional Template Fields NOW AVAILABLE MAXIMIZE

Choose which template fields are required.

Every template field used to be required before you could create a contract. Now you can mark fields as optional, so people can skip what doesn't apply.

More flexibility to use the same template and fill in only what's relevant, so it's easier to create contracts.



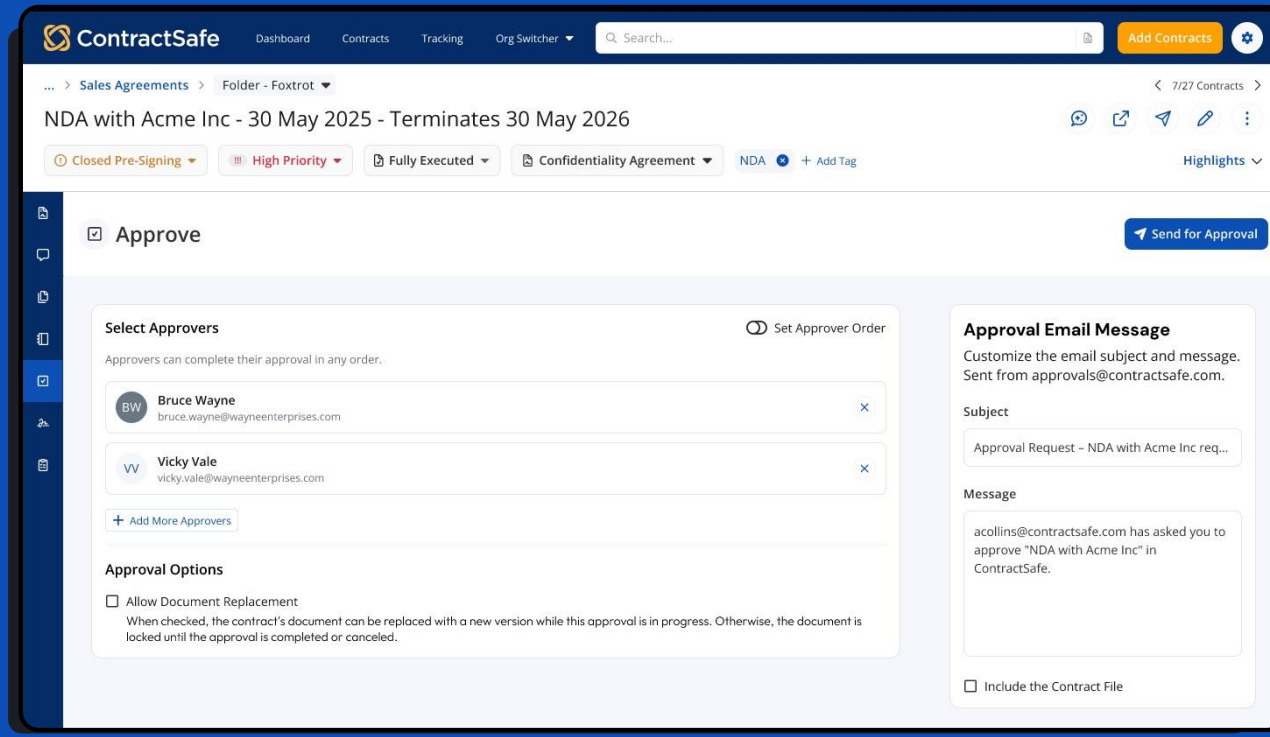
Redesigned Approvals Workspace **NOW AVAILABLE** **FINALIZE + MAXIMIZE**

Approvals are now easier to set up and send.

The redesigned Approvals Workspace brings everything into one cleaner, easier-to-read view.

- Pick approvers who can access the contract
- Send to everyone at once or in a specific order
- See who's in a group before you send

**Released to customers in phases. If you don't see it yet, it will be available soon.*



Advanced Approvals

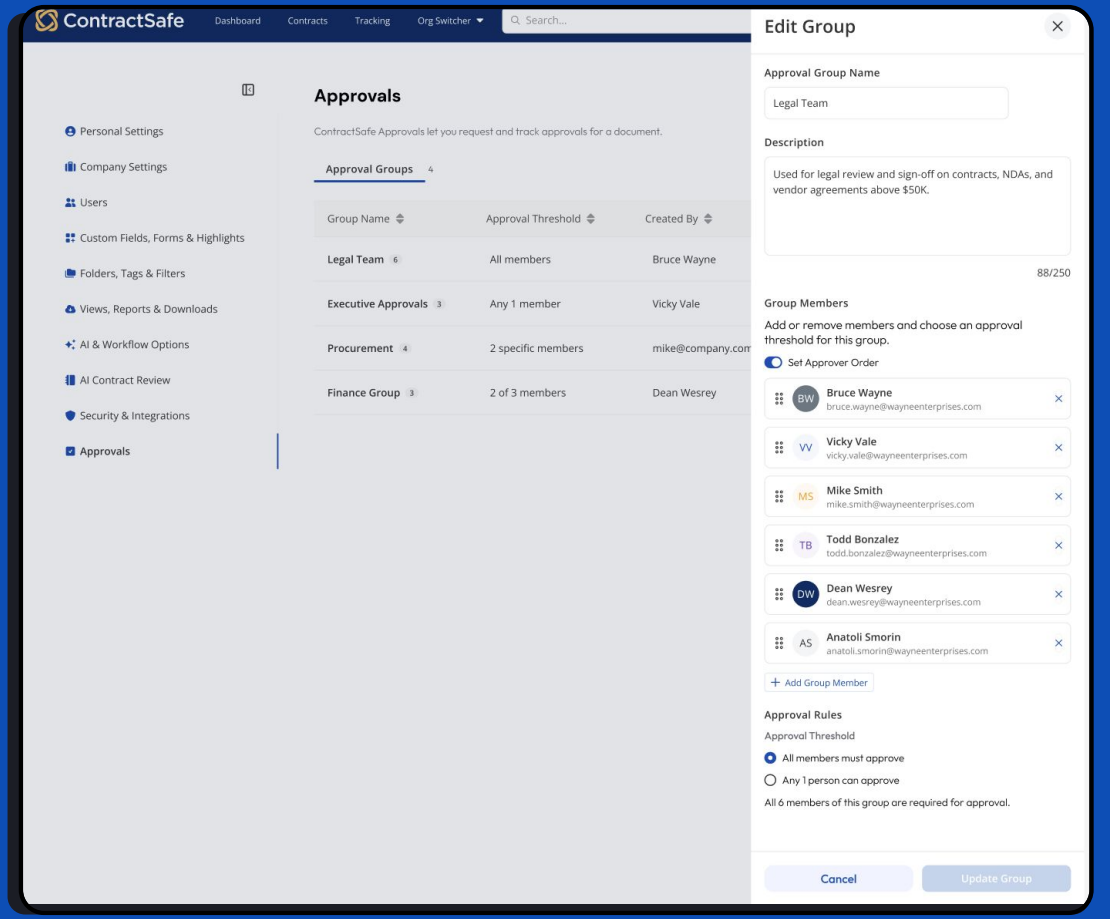
IN DEVELOPMENT

FINALIZE + MAXIMIZE

Set approval rules that fit your team.

Not every approval needs the whole group. With approval thresholds, you can choose whether one person or the entire group must sign off.

Fewer bottlenecks and approvals keep moving when someone is out.



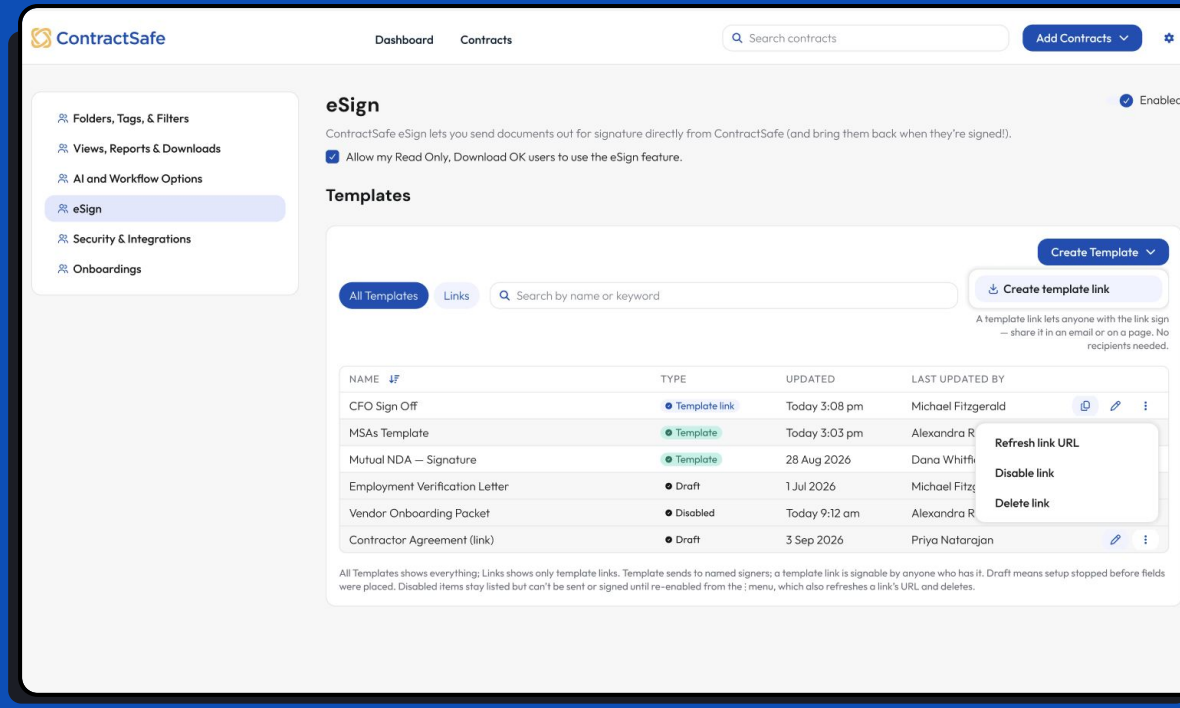
eSign Templates IN DEVELOPMENT FINALIZE + MAXIMIZE

Request signatures in fewer steps.

eSign is getting three updates:

- Send contracts using saved templates
- Add multiple contracts to one envelope
- Set up your own eSign templates

Less repeat setup each time you send a contract for signature.

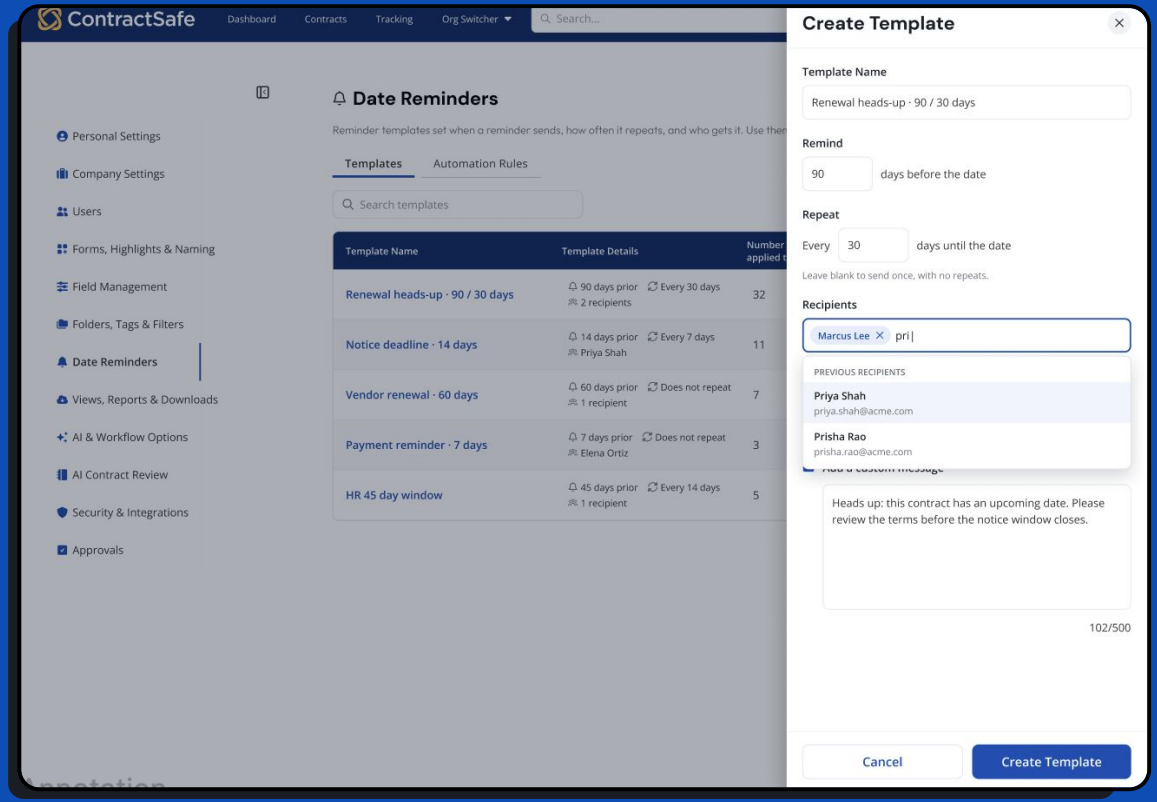


Date Reminder Templates COMING SOON ALL PLANS

Set the reminder once. Reuse it across contracts.

Save a reminder once, then reuse it across your contracts. Keep your team on track without setting up the same reminders over and over.

Keep reminders consistent across contracts, without the repeat setup.

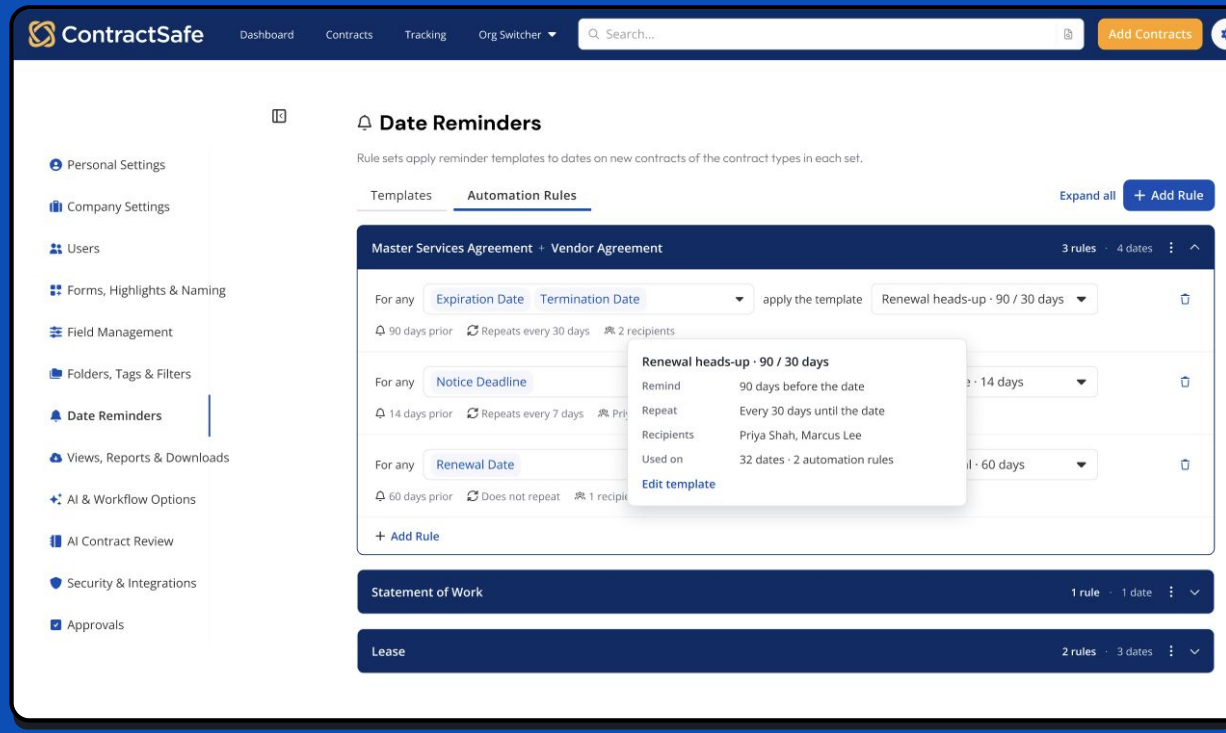


Date Reminder Automation Rules IN DEVELOPMENT ALL PLANS

The right reminders, set automatically.

No more setting up reminders one contract at a time. Create a rule once, and every matching contract gets the right reminder automatically.

Less manual setup and fewer contracts without reminders.



Customizable Lifecycle Stage Names

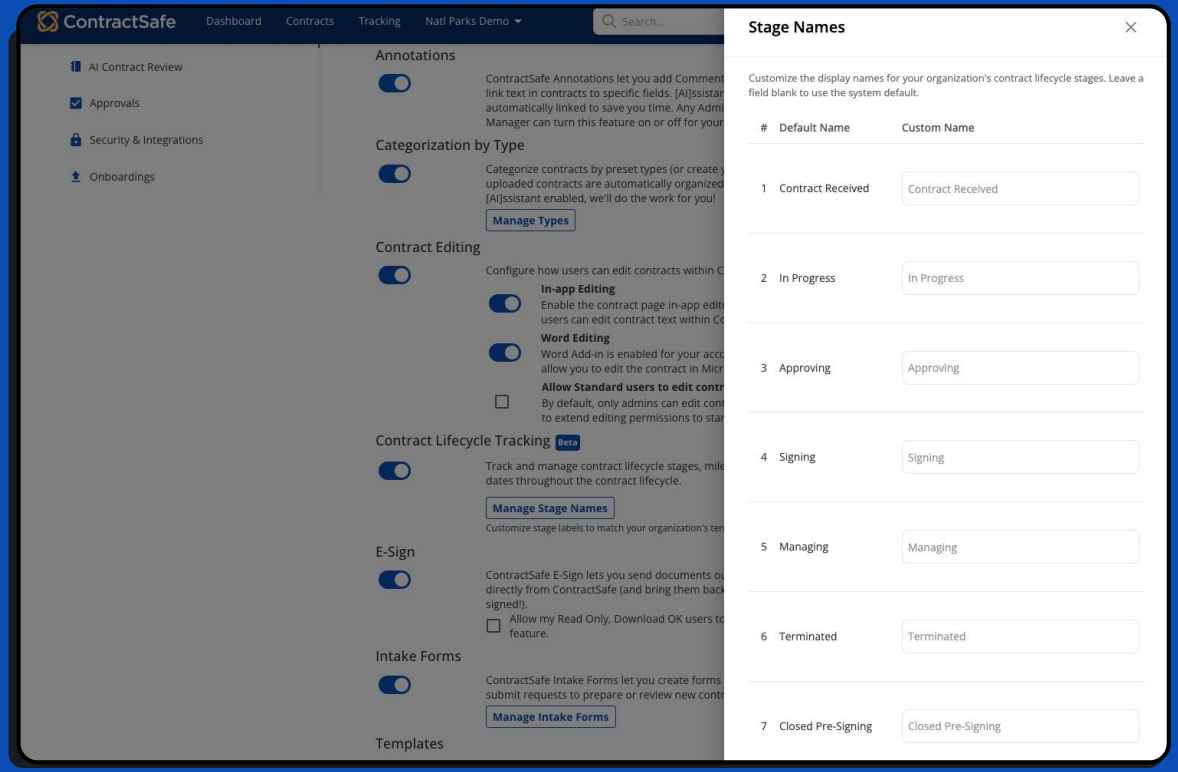
NOW AVAILABLE

MAXIMIZE

Use your own stage names.

Use your team's own language for every contract lifecycle stage. Rename stages once, and the new names show up across contracts, filters, and reports.

Your team sees stage names they recognize, so contracts are easier to track and report on.



Across the Contract Lifecycle ON THE ROADMAP

Get answers faster, wherever you work.

01

Connect your AI tools with the MCP connector

Ask questions about your contracts right from Claude, ChatGPT, Gemini, or whichever AI tool your team already uses, and get answers in seconds.

02

Ask one question. Search every contract.

Today, Ask AI works inside one contract at a time. Soon you'll be able to ask a general question and ContractSafe will search across **all** of your contracts for the answer.



Thank you!