



What's New in ContractSafe

September 2026

Here's what's new

Review with Confidence

AI Extraction for Custom Fields

AI Suggestion Workflow
Improvements

Setup with Ease

Approval Admin Settings

Custom Fields for Intake Forms
and Templates

Stay Organized

Automatic Contract Naming

Comment Notification Email
Improvements

Product tip: AI Contract Review

Coming soon: A preview of what's on the roadmap

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

PRODUCT UPDATES

What's new in ContractSafe

All the latest ContractSafe features, updates, and improvements

Featured updates



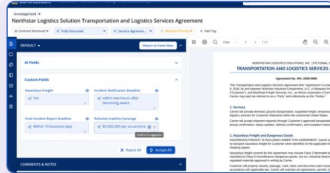
September 2026

Approval Groups Are Easier to Manage in One Place

Manage Approval Groups in one place with Approval Settings. Create and edit groups, set an optional approval order, and make changes without losing history.

Approvals & eSign Finalize, Maximize

New Feature

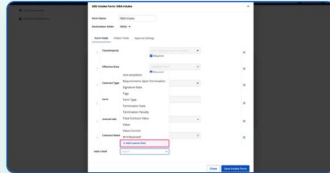


September 2026

AI Extraction for Custom Fields: You Define It. AI Finds It.

Go beyond the 29 standard AI Extraction Fields and capture the terms your business tracks. Describe what you need in your own words, and AI finds it across your contracts.

AI Maximize New Feature



September 2026

Add Custom Fields Without Leaving Your Workflow

Create custom fields while setting up templates and intake forms. Keep work moving without switching screens, losing progress, or starting over.

Intake Forms Templates Maximize

New Feature

AI Extraction for Custom Fields

You define it. AI finds it.

Maximize

ContractSafe already pulls 29 standard contract details. Now you can turn on AI extraction for any custom field, describe what it should find, and review each suggestion right next to where it appears in the contract.

Track the terms that matter to your business, without the manual data entry.

The screenshot displays the ContractSafe web application interface. The top navigation bar includes the ContractSafe logo, a search bar, and links to Dashboard, Contracts, and Tracking. The main header shows the contract title: "Northstar Logistics Solution Transportation and Logistics Services Agreement". Below this, there are filters for "Contract Received", "Fully Executed", "Service Agree...", and "Medium Priority", along with an "Add Tag" button. The left sidebar contains a list of contract details, including "AI Fields" and "Custom Fields". The "Custom Fields" section is expanded, showing a table with four rows of contract terms and their corresponding AI-extracted values. The table has columns for the field name and the extracted value. The first row is "Hazardous Freight" with the value "Yes". The second row is "Incident Notification Deadline" with the value "within two hours after becoming aware". The third row is "Final Incident Report Deadline" with the value "Within 10 business days". The fourth row is "Pollution Liability Coverage" with the value "\$5,000,000 per occurrence". Below the table are buttons for "Reject All" and "Accept All". The right side of the interface shows the full text of the contract, titled "TRANSPORTATION AND LOGISTICS SERVICES AGREEMENT". The contract text includes sections for "1. Services", "2. Hazardous Freight and Dangerous Goods", and "3. Regulatory Compliance".

Field	Value
Hazardous Freight	Yes
Incident Notification Deadline	within two hours after becoming aware
Final Incident Report Deadline	Within 10 business days
Pollution Liability Coverage	\$5,000,000 per occurrence

Reject All Accept All

COMMENTS & NOTES

RELATED DOCUMENTS

TRANSPORTATION AND LOGISTICS SERVICES AGREEMENT

Agreement No. NFL-2026-0908

This Transportation and Logistics Services Agreement (the "Agreement") is entered into as of September 8, 2026, by and between Northstar Industrial Components, LLC, a Delaware limited liability company ("Customer"), and BluePeak Freight Services, Inc., an Illinois corporation ("Carrier"). Customer and Carrier may each be referred to as a "Party" and collectively as the "Parties."

1. Services

Carrier will provide domestic ground transportation, expedited freight, temporary storage, and related logistics services for Customer shipments within the continental United States.

Carrier will accept shipment requests through Customer's approved transportation portal and will provide pickup confirmation, status updates, delivery confirmation, and exception notices.

2. Hazardous Freight and Dangerous Goods

HAZARDOUS FREIGHT IS INCLUDED UNDER THIS AGREEMENT. Carrier is permitted and expected to transport hazardous freight for Customer when identified on the applicable shipment request and shipping papers.

Hazardous freight covered by this Agreement may include Class 3 flammable liquids, lithium-ion batteries classified as Class 9 miscellaneous dangerous goods, dry ice, industrial cleaning chemicals, and other regulated materials approved in writing by Carrier.

Customer will properly classify, package, mark, label, and document each hazardous shipment in accordance with applicable law. Carrier will maintain all registrations, permits, trained personnel, equipment, and operating procedures required for the transportation services it performs.

Carrier may reject a hazardous shipment that is improperly packaged, mislabeled, leaking, undocumented, or not included within Carrier's approved hazardous-materials profile.

3. Regulatory Compliance

Each Party will comply with applicable hazardous-materials transportation requirements, including applicable provisions of United States Department of Transportation regulations under 49 C.F.R. Parts 171 through 180.

Review AI suggestions with fewer clicks.

- Confirm or clear a suggestion without leaving the AI field
- See other options without losing your place
- Review new suggestions before anything changes

Fewer clicks, clearer choices, and a simpler way to review AI-suggested values.

The image displays two overlapping screenshots of a software interface. The top screenshot, titled 'Counterparty', shows a search bar with 'Soylent Global Industries, PLC' entered. Below the search bar, a list of 'EXISTING COUNTERPARTIES' is shown, including 'Soylent Global Industries, PLC' (marked as 'AI Suggested'), 'Soylent Corp.', 'Soylent Industries (UK) Ltd.', 'Stark Industries, Inc.', and 'Wayne Enterprises LLC'. The bottom screenshot, titled 'Deadline to Nonrenew', shows a date field with '07/31/2029'. Below the date field, a notification box states 'New AI suggestion found' and 'A newer document version contains an updated value for this field.' The notification box displays 'CURRENT' as '07/31/2029' and 'NEW AI VALUE' as '07/31/2030'. At the bottom of the notification box are two buttons: 'Keep Current' and 'Accept New Value'.

Approval groups, all in one place.

Finalize + Maximize

You no longer have to open a contract to create an Approval Group. Create groups right from Approval Settings, add members, update details, and remove groups your team no longer needs.

Keep approvals organized and up to date, without digging through contracts.

The screenshot displays the ContractSafe web application. The main interface is divided into a left sidebar with navigation options and a central content area. The sidebar includes: Personal Settings, Company Settings, Users, Custom Fields, Forms, & Highlights, Folders, Tags, & Filters, Views, Reports, & Downloads, AI and Workflow Options, AI Contract Review, Approvals (selected), Security & Integrations, and Onboardings. The central content area shows the 'Approvals' section with a sub-header 'Approval Groups 5'. Below this is a table listing approval groups:

Group Name	Created By
NDA	4
MSA	4
Leadership	5
Sales	3
Finance	4

Overlaid on the right is the 'Edit Group' modal. It contains the following fields and sections:

- Approval Group Name:** A text input field containing 'Leadership'.
- Description:** A text input field with a placeholder 'Enter...'.
- Group Members:** A section with the instruction 'Select users to add or remove from this Approval group.' and a toggle switch for 'Set Approver Order' (currently turned on).
- Add Group Member:** A button with a plus icon.
- Member List:** A list of five members, each with a number, a user icon, a name, and an email address:
 - 1. Steven (s) steven@contractsafe.com
 - 2. Jordan Smith (JS) j.smith@spacely-space-sprockets.com
 - 3. George Teller (GT) g.teller@spacely-space-sprockets.com
 - 4. David Edwards (DE) d.edwards@spacely-space-sprockets.com
 - 5. Gary Banks (GB) g.banks@spacely-space-sprockets.com
- Buttons:** 'Cancel' and 'Update Group' buttons at the bottom right.

Automatic Contract Naming

Give every contract a consistent name automatically.

Now admins can set the naming format once, and each contract is named automatically using the details you choose. Apply your rules across new and existing contracts.

No more renaming by hand or guessing which contract is which.

All Plans

ContractSafe Dashboard Contracts Tracking contractsafe.com_33

Personal Settings
Company Settings
Users
Custom Fields, Forms, Highlights, & Naming
Folders, Tags, & Filters
Views, Reports, & Downloads
AI and Workflow Options
AI Contract Review
Security & Integrations

Custom Fields, Forms, Highlights, & Naming

Custom Fields Forms Highlights **Naming**

Automatic Contract Naming ☒

Build contract titles automatically from the fields below, joined by a separator of your choosing. When on, this replaces AI title suggestion for new contracts. Manual edits to a title always take priority and will stick.

Naming Preview

This is how your contract names will be built. Choose up to 5 fields, joined by a separator of your choosing, in the order shown. You can reorder the fields by dragging them, or remove any you don't need.

Contract Type with Counterparty expires Termination Date Add Field

3 of 5 fields selected — you can add 2 more
Sample: Non Disclosure Agreement with Acme Corporation expires 12/31/2026

Restore To Default Cancel Save

How the title behaves

Three states a contract moves through with automatic naming turned on.

1 - Fallback

Uploaded file name

The contract keeps the uploaded file name until every chosen field has a saved value or a pending AI suggestion.

MSA_DunderMifflin_v3_FINAL.pdf
Naming pending — 1 field still empty

2 - Applied

Generated title

Once every field is filled, the title is built from the convention and applied automatically. If a previously filled field is cleared out, it will appear as bracketed placeholders, e.g. [Counterparty] in the contract name.

Non Disclosure Agreement with Acme Corporation expires 12/31/2026
Auto generated from naming convention

3 - Manual override

Edited title sticks

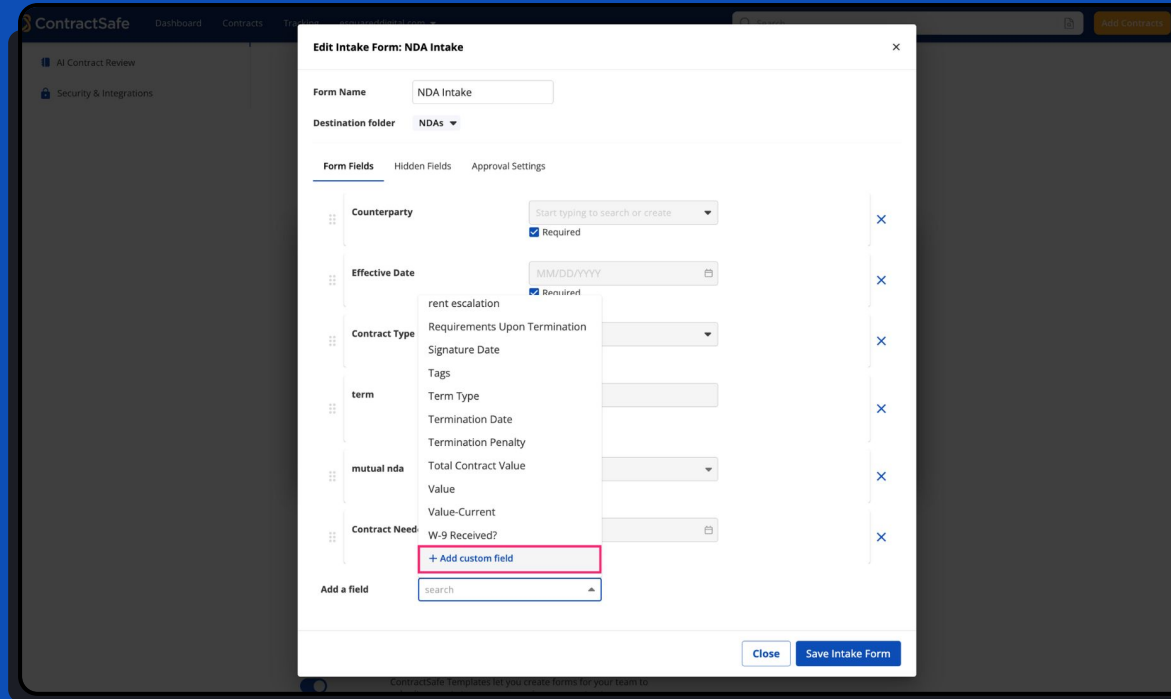
If someone edits the title by hand, that wins and the convention stops overwriting it.

Acme MSA — Renewal 2026
Manually edited - convention no longer applied

Create custom fields right in your workflow.

Admins can now create custom fields while setting up templates and intake forms. New fields save automatically, so you can keep building without leaving the page.

Less switching between screens.
More time building what your team needs.



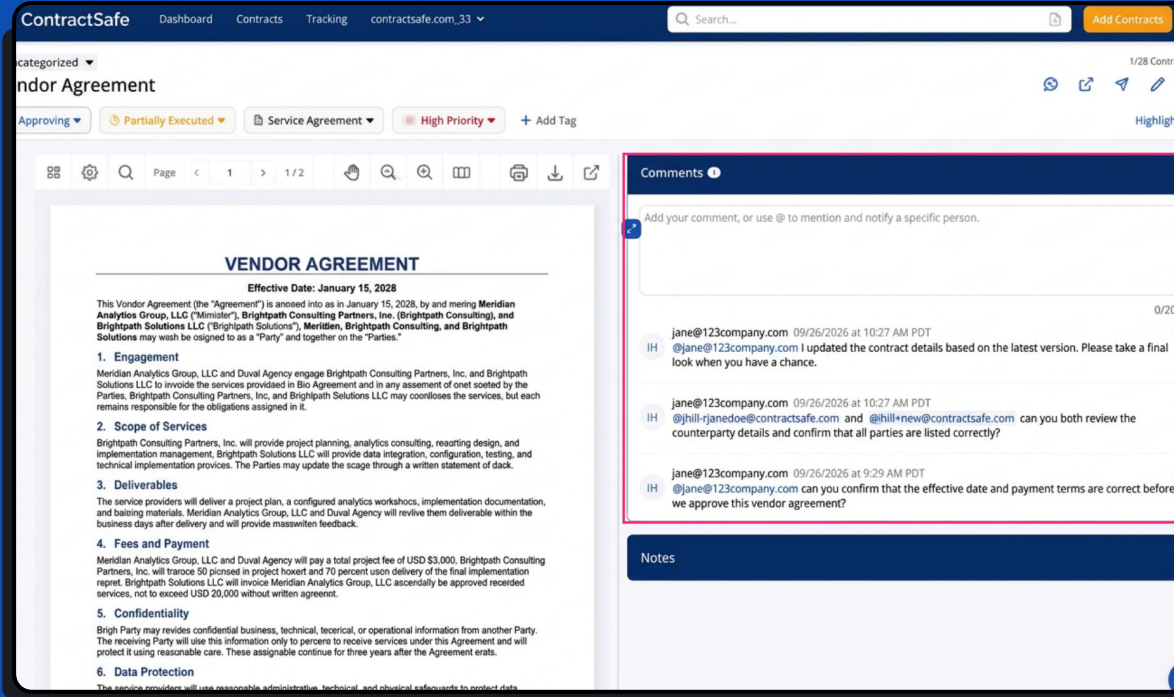
Comment Notification Email Improvements

Fewer emails. Less inbox noise.

For comment thread replies, you'll get an email only when someone mentions you. Replies that don't mention you stay out of your inbox, and the full conversation stays on the contract.

Spend less time sorting through replies and more time on the conversations that need you.

Finalize + Maximize



Product Tip: AI Contract Review

Product Tip: AI Contract Review

Maximize

Review contracts faster with AI.

AI Contract Review checks incoming contracts against your playbook to catch risks, gaps, and non-standard language.

AI handles the first pass, so you can focus on decisions that need your attention.

- Move from review to negotiation sooner.
- See which contracts need attention first.
- Keep up with more contracts without wearing out your team.

The screenshot displays the ContractSafe AI Contract Review interface. At the top, the 'ContractSafe' logo is visible alongside navigation links for 'Dashboard', 'Contracts', and 'Tracking'. A search bar is located on the right. The main header identifies the document as a 'Corporate Professional Services Agreement'. Below this, filters for 'Approving', 'Fully Executed', 'Service Agreement', and 'Medium Priority' are shown, along with an 'Add Tag' button. A metadata table provides details: Contract Owner (ihill@contractsafe.com), Termination Date (01/14/2028), Effective Date (11/01/2027), Counterparty, Auto-renewal Status (Annual), Includes Confidentiality Provision (Yes), and IP Ownership/License (Yes). A central pane displays the contract text, starting with 'MASTER SERVICES AGREEMENT' and 'Contract No. MSA-2026-0114'. The text describes the agreement between Meridian Analytics Group, LLC and Brightpath Consulting Partners, Inc. A right-hand sidebar contains a checklist of clauses with status indicators: 'Copy of Non-Competition Covenant' (Fail), 'Copy of Non-Solicitation Covenant' (Fail), 'Copy of Dispute Resolution (Arbitration)' (Fail), 'Copy of Governing Law' (Pass), 'Copy of Entire Agreement' (Fail), 'Copy of Company Policies and Compliance' (Fail), 'Copy of No Conflicting Obligations' (Fail), and 'Copy of Return of Company Property' (Pass).

You don't have start with a blank page.

Start with a sample playbook and rule or a contract you already trust.

01

Start with a sample

Browse sample playbooks and rules for common agreement types.

02

Use what you have

Use a contract your team already trusts as a starting point.

03

Make it yours

Keep, edit, remove, or add rules to match your standards.

AI suggests. You define the rules.

Your team decides what belongs in the playbook and makes the final call.

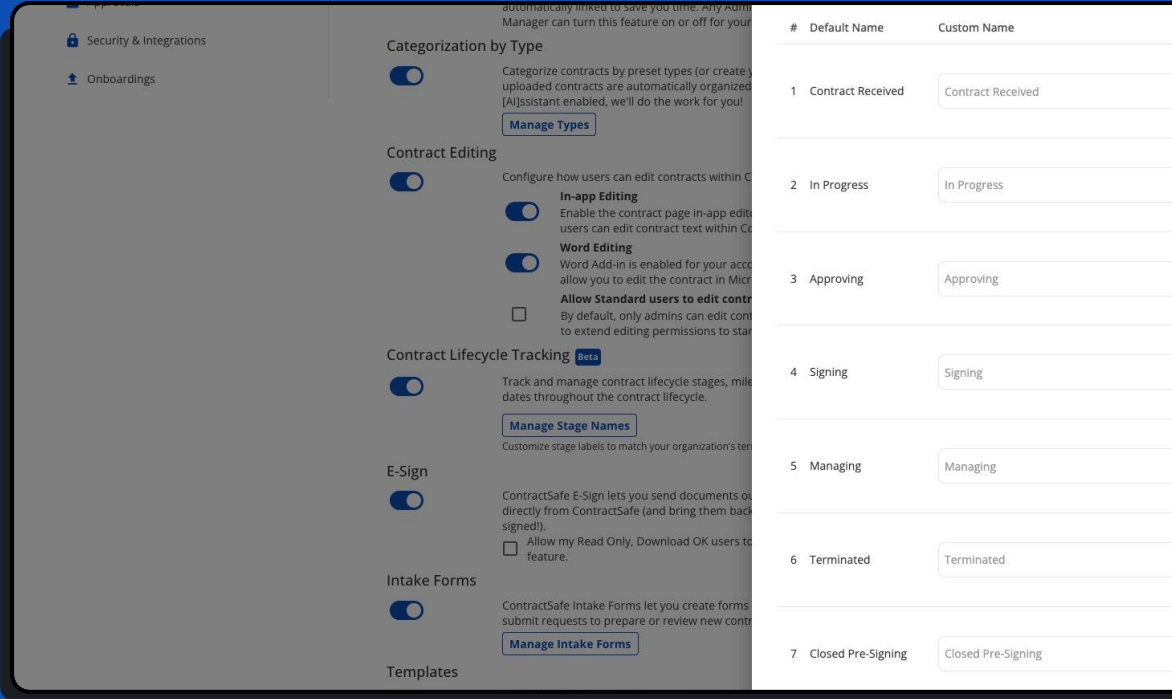
Coming Soon: Preview of the Roadmap

Use your own stage names.

Today, lifecycle stage names are fixed, so teams have to translate between their own terms and ContractSafe's. Admins will be able to rename each stage to match your company's internal terms.



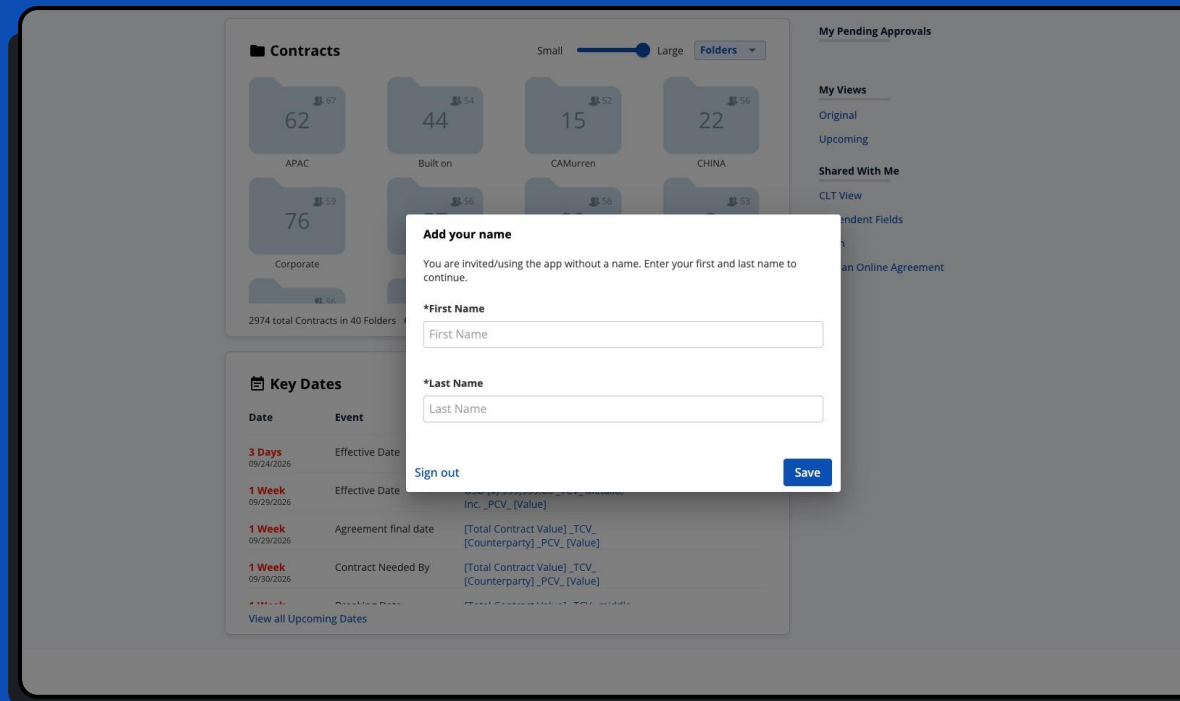
Your team sees stage names they recognize, so contracts are easier to track and report on.



First and last name required.

Soon, anyone without a first and last name on their account will see a prompt asking them to enter their full name.

Email addresses don't always clearly identify someone, and full names make it easier to see who commented, who approved, and who owns or requested a contract.



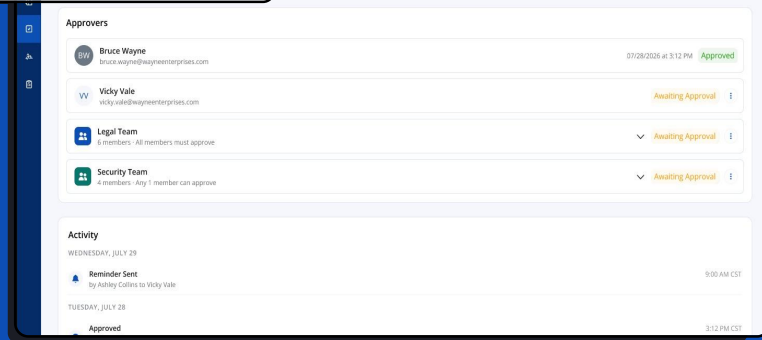
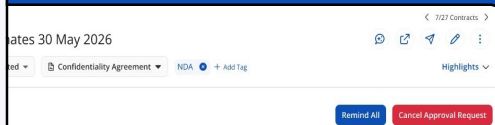
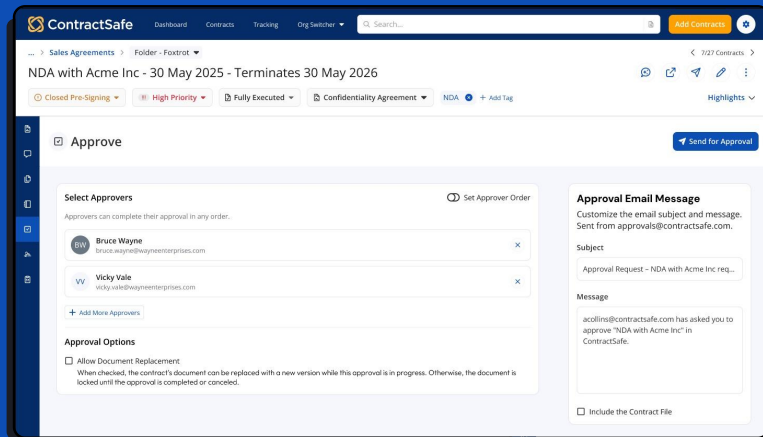
Redesigned Approvals Workspace

See, manage, and track every approval in one place.

Finalize + Maximize

The redesigned Approvals Workspace brings status, approvers, timing, notes, and decision history into one cleaner, easier-to-read view.

See what's already been approved, who still needs to review the contract, and the notes behind each decision, all in one place.



Optional Template Fields

Choose which template fields are required.

Finalize + Maximize

Today, every template field has to be filled in before a contract can be submitted. You'll be able to mark each field as required or optional.

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

The screenshot displays the 'Edit Template: Sept 18 - Optional Fields Demo' window in the ContractSafe application. The interface is divided into several sections:

- Template Name:** A text input field containing 'Sept 18 - Optional Field'.
- Destination folder:** A dropdown menu set to 'Uncategorized'.
- Template Fields:** A tabbed interface with 'Template Fields' selected. It contains a list of document fields:

Field Name	Field Value	Required
Counterparty	{{COUNTERPARTY}}	☒
Counterparty Address	{{COUNTERPARTY_ADDRESS}}	☐
Agreement final date	{{AGREEMENT_FINAL_DATE}}	☒

Below the list is a search bar to 'Add a document field'.

- Other Fields:** A section with a description: 'These fields will not appear in the document but will allow you to collect additional contract information from your users filling out templates. You can require fields using the checkbox next to each if desired.' It includes a search bar to 'Add a field'.
- Document File:** A section with a description: 'Add a word document below that contains the document fields that you want your end users to fill out when creating a contract from a template.'

At the bottom right, there are 'Close' and 'Save & Upload' buttons.

eSign Upgrades

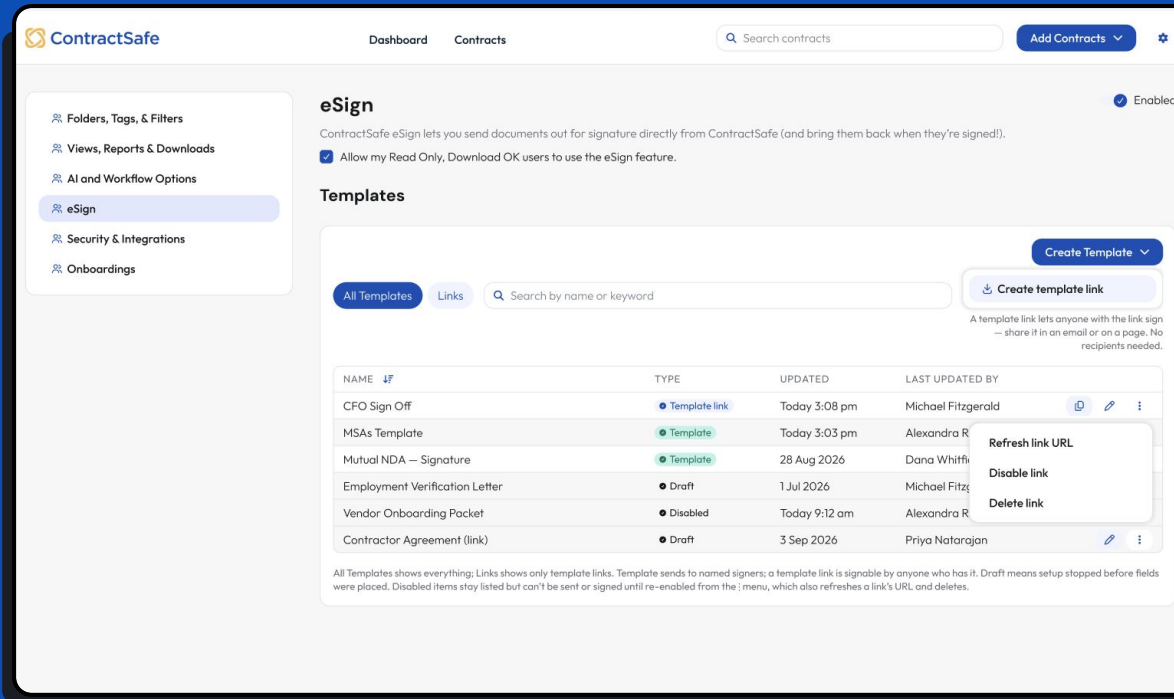
Send for signature in fewer steps.

Finalize + Maximize

eSign is getting three updates:

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

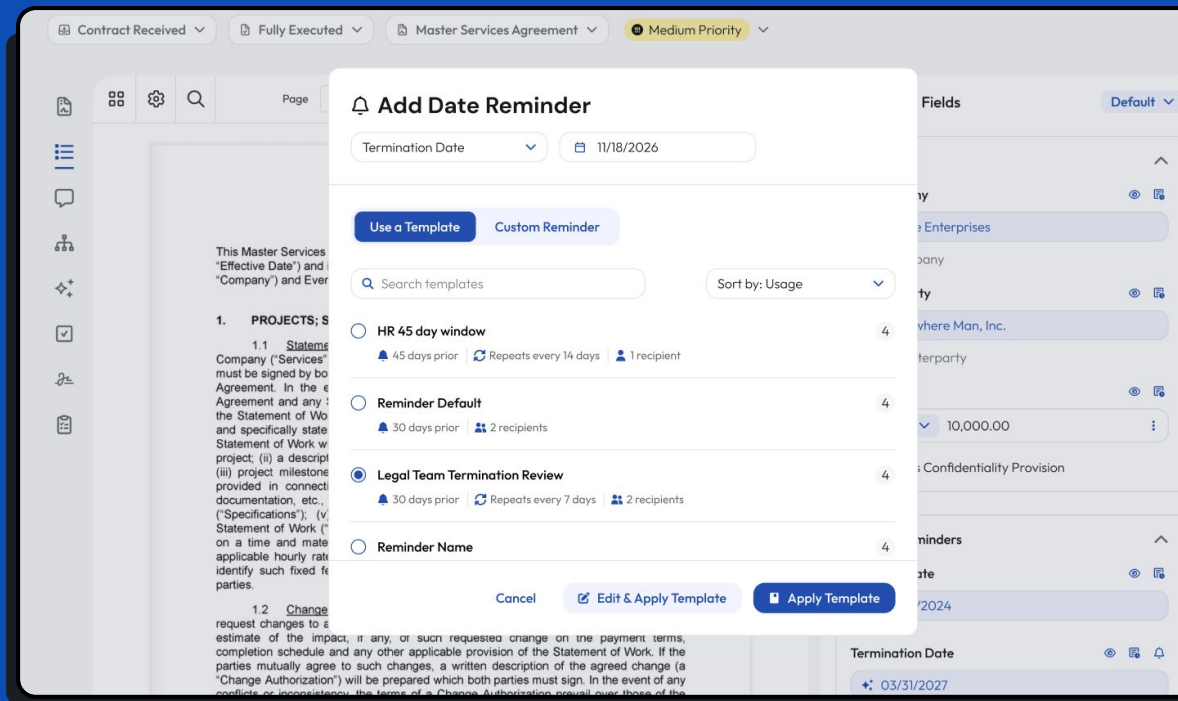
Less repeat setup each time you send a contract for signature.



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.





Thank you!