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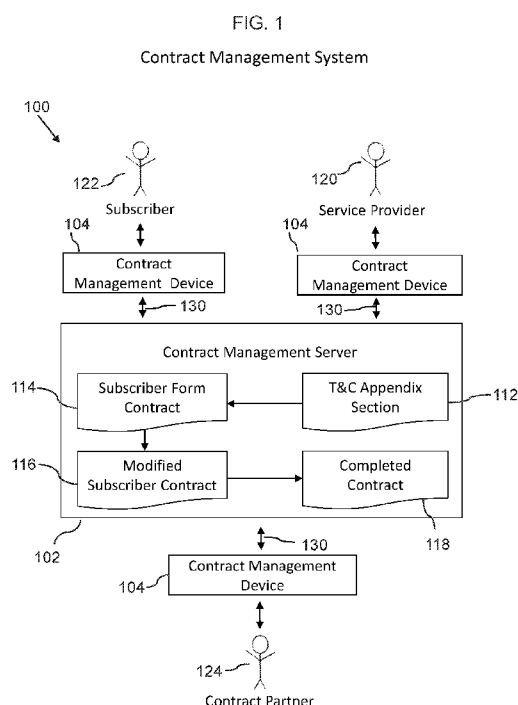
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(54) Title: CONTRACT MANAGEMENT SYSTEM, APPARATUS, AND METHOD



(57) Abstract: A contract management system includes a contract management server and a contract management device. A contract management server includes a terms and conditions appendix section store, an archive manager, and a contract manager. A contract manager can incorporate a terms and conditions appendix section into a subscriber form contract, thereby creating a modified subscriber contract. A contract partner can accept a modified subscriber contract, thereby creating a completed contract. A contract management device can prompt a contract partner to accept an amendment to the completed contract when an updated version of the terms and conditions appendix section is released. Further disclosed is a computer-implemented method for managing contracts, including a method for updating and archiving terms and conditions appendix sections.

TITLE OF INVENTION

Contract management system, apparatus, and method

CROSS-REFERENCE TO RELATED APPLICATIONS

[0001] This international PCT application claims the benefit of United States Non-Provisional Application No. 15/449,305, filed March 3, 2017; and United States Provisional Application No. 62/372,585, filed August 9, 2016.

FIELD OF THE INVENTION

[0002] The present invention relates generally to the field of managing contracts, and more particularly to methods and systems for managing contractual terms and conditions.

BACKGROUND OF THE INVENTION

[0003] Contracts generally comprise a variety of sections intended to specify the nature of the agreement. Some sections can include language detailing business terms that are relevant solely to specific individual contracts, such as payment, quantity, and delivery/performance dates. Additionally, contracts usually include more general sections providing terms and conditions, covering topics such as confidentiality, limitation of liability, indemnification, term, termination and alternative dispute resolution.

[0004] In some form contracts, known as a contracts of adhesion, the generalized terms and conditions are written by one of the parties and are non-negotiable. Contracts of this type provide terms and conditions that are often written to heavily favor the author at the expense of the less sophisticated party, and are typically used for mass market contracts or when there is a large difference in the level of sophistication between the contracting parties in the field covered by the contract. It can be difficult for an unsophisticated contracting party to understand the terms and conditions to which they are agreeing.

[0005] Individually negotiated contracts providing more even handed terms are commonly obtained by engaging legal counsel, but the time and expense required to do so are unsuitable for broad categories of common transactions, including those involving smaller dollar amounts or evolving business opportunities.

[0006] As such, considering the foregoing, it may be appreciated that there continues to be a need for novel and improved systems, apparatuses and methods for incorporating a standardized set of terms and conditions into a form contract, and for amending a form contract when the standardized terms and conditions are updated.

SUMMARY OF THE INVENTION

[0007] The foregoing needs are met, to a great extent, by the present invention, wherein in aspects of this invention, enhancements are provided to the existing model of managing contracts.

[0008] In an aspect, a contract management system can include:

a contract management server, which can be configured to store a terms and conditions appendix section;

wherein the contract management server can be configured to create a subscriber form contract, and receive an instantiated terms and conditions appendix section, such that the contract management server can be configured to incorporate the terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;

wherein the contract management server can be configured to create a completed contract when the modified subscriber contract is accepted by a contract partner.

[0009] In related aspects, the contract management server can be configured to incorporate the terms and conditions appendix section into the subscriber contract by either adding a sentence which references the terms and conditions appendix section, or including the full text of the terms and conditions appendix section in the subscriber form contract.

[00010] In related aspects, the system can include a contract management device which can be configured to allow a contract partner and/or a subscriber to accept, review and enter into the modified subscriber contract.

[00011] In related aspects, the contract management server can be configured to prompt the contract partner and/or the subscriber to review an amendment, and subject to that review, accept the amendment, and thereby enter into the amendment to the completed contract.

[00012] In an aspect a contract management system can include:

- a) a terms and conditions server, which can be configured to store a terms and conditions appendix section; and
- b) a subscriber server, which can be configured to store a subscriber form contract, wherein the subscriber server is connected to the terms and conditions server;

wherein the subscriber server can be configured to receive an instantiated terms and conditions appendix section, such that the subscriber server is configured to incorporate the terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;

wherein the subscriber server can be configured to create a completed contract when the modified subscriber contract is accepted, and thereby entered into, by a contract partner.

[00013] In related aspects, a computer-implemented method for managing contracts can include:

- a) selecting a desired subscriber form contract;
- b) adding language to the subscriber form contract incorporating a current version of a terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;
- c) presenting the modified subscriber contract to a subscriber and a contract partner for review; and
- d) accepting the modified subscriber contract by the contract partner, thereby creating a completed contract.

[00014] In related aspects, the method can include prompting the contract partner to review and accept, and thereby enter into, an amendment to the completed contract.

[00015] In related aspects, the method can include adding language to the modified subscriber contract which acts to automatically update the completed agreement when an update version of the terms and conditions appendix section is released.

[00016] In related aspects, the method can include:

- a) reviewing the current version of the terms and conditions appendix section;
- b) revising the current version of the terms and conditions appendix section, thereby creating an updated version of the terms and conditions appendix section;
- c) releasing the updated version of the terms and conditions appendix section; and
- d) archiving the current version of the terms and conditions appendix section.

[00017] There has thus been outlined, rather broadly, certain embodiments of the invention in order that the detailed description thereof herein may be better understood, and in order that the present contribution to the art may be better appreciated. There are, of course, additional embodiments of the invention that will be described below and which will form the subject matter of the claims appended hereto.

[00018] In this respect, before explaining at least one embodiment of the invention in detail, it is to be understood that the invention is not limited in its application to the details of construction and to the arrangements of the components set forth in the following description or illustrated in the drawings. The invention is capable of embodiments in addition to those described and of being practiced and carried out in various ways. In addition, it is to be understood that the phraseology and terminology employed herein, as well as the abstract, are for the purpose of description and should not be regarded as limiting.

[00019] As such, those skilled in the art will appreciate that the conception upon which this disclosure is based may readily be utilized as a basis for the designing of other structures, methods and systems for carrying out the several purposes of the present

invention. It is important, therefore, that the claims be regarded as including such equivalent constructions insofar as they do not depart from the spirit and scope of the present invention.

BRIEF DESCRIPTION OF THE DRAWINGS

[00020] FIG. 1 is a schematic diagram illustrating a contract management system, according to an embodiment of the invention.

[00021] FIG. 2 is a schematic diagram illustrating a contract management server, according to an embodiment of the invention.

[00022] FIG. 3 is a schematic diagram illustrating a contract management device, according to an embodiment of the invention.

[00023] FIG. 4 is a flowchart illustrating steps that may be followed, in accordance with one embodiment of a method or process for managing contracts.

[00024] FIG. 5 is a flowchart illustrating steps that may be followed, in accordance with one embodiment of a method or process for managing contracts.

[00025] FIG. 6 is a flowchart illustrating steps that may be followed, in accordance with one embodiment of a method or process for managing contracts.

[00026] FIG. 7 is a schematic diagram illustrating a contract management system, according to an embodiment of the invention.

[00027] FIG. 8 is a schematic diagram illustrating a subscriber server, according to an embodiment of the invention.

[00028] FIG. 9 is a schematic diagram illustrating a terms and conditions server, according to an embodiment of the invention.

DETAILED DESCRIPTION

[00029] Before describing the invention in detail, it should be observed that the present invention resides primarily in a novel and non-obvious combination of elements and process steps. So as not to obscure the disclosure with details that will readily be apparent to those skilled in the art, certain conventional elements and steps have been presented with lesser detail, while the drawings and specification describe in greater detail other elements and steps pertinent to understanding the invention.

[00030] The following embodiments are not intended to define limits as to the structure or method of the invention, but only to provide exemplary constructions. The embodiments are permissive rather than mandatory and illustrative rather than exhaustive.

[00031] In the following, we describe the structure of an embodiment of a contract management system **100** with reference to FIG. **1**, in such manner that like reference numerals refer to like components throughout; a convention that we shall employ for the remainder of this specification.

[00032] In an embodiment a contract management system **100** can comprise:

a contract management server **102**, which can be configured to store a template terms and conditions appendix section **112**;

wherein the contract management server **102** can be configured to create a subscriber form contract **114**, such that the contract management server **102** can be configured to incorporate the terms and conditions appendix section **112** into the subscriber form contract **114**, thereby creating a modified subscriber contract **116**;

wherein the contract management server **102** can be configured to create a completed contract **118** when the modified subscriber contract **116** is accepted by a contract partner **124**.

[00033] In a related embodiment, a subscriber **122** can be a person or business entity who has entered into a business relationship with a service provider **120**. The terms and

conditions appendix section **112** can be copyrighted material owned by the service provider **120**. Furthermore, the business relationship between the service provider **120** and the subscriber **122** can include a subscription, or license, from the service provider **120** to the subscriber **122** to utilize the terms and conditions appendix section **112** in contracts and agreements used by the subscriber **122**, such as the subscriber form contract **114**.

[00034] In certain embodiments, both the subscriber **122** and the contract partner **124** can be contracting parties to the completed contract **118**.

[00035] In a related embodiment, the terms and conditions appendix section **112** (shown in FIG. 1 as the T&C Appendix Section **112**) can be a standardized set of terms and conditions written by a third party. The terms and conditions appendix section **112** can be written with a goal of creating a fair and even completed contract **118** between the subscriber **122** and the subscriber's contract partner **124**, particularly in instances where the contract partner **124** is the less sophisticated party. When incorporated into a preexisting contract, such as the subscriber form contract **114**, the terms and conditions appendix section **112** can function as the terms and conditions of the subscriber form contract **114**.

[00036] In a related embodiment, as shown in FIG. 1, terms and conditions appendix section **112** can be stored on the contract management server **102**, which can be accessed and controlled by the service provider **120** via a contract management device **104**. The contract management device **104** can be configured to communicate with the contract management server **102** over a network **130**.

[00037] In a related embodiment, as shown in FIG. 1, in the event that a subscriber **122** does not have its own server, the service provider **120** can offer a turn-key service by hosting and storing the subscriber form contract **114** and/or the modified subscriber contract **116** on a contract management server **102**. The contract management server **102** can be accessed by the subscriber **122** and the contract partner **124** via a contract management device **104**.

[00038] In a related embodiment, as shown in FIG. 1, the contract management server **102** can be configured to store the completed contract **118**, which can increase the

ease with which the complete contract **118** can be amended by the contracting parties, as is described hereinafter.

[00039] In a related embodiment, the contract management server **102** can be configured to incorporate the template terms and conditions appendix section **112** into the subscriber form contract **114** by adding language to the subscriber form contract, such that the added language refers to the template terms and conditions appendix section. The added language can, for example, be an additional sentence.

[00040] In a related embodiment, the contract management server **102** can be configured to incorporate the template terms and conditions appendix section **112** into the subscriber form contract **114** by creating an instantiated terms and conditions appendix section **112**, which is a copy of the template terms and conditions appendix section **112**, such that the contract management server **102** is configured to add the instantiated terms and conditions appendix section **112** to the subscriber form contract **114**.

[00041] In a related embodiment, as shown in FIG. **2**, a contract management server **102** can comprise:

- a) a processor **202**;
- b) a non-transitory memory **204**;
- c) an input/output component **206**;
- d) a terms and conditions appendix section store **210**, which can be configured to store a current version of the template terms and conditions appendix section **112**;
- e) an archive manager **212**, which can be configured to store previous versions of the template terms and conditions appendix section **112**; and
- f) a contract manager **214**; all connected via
- g) a data bus **220**.

[00042] In a related embodiment, the service provider **120** can control the contract management server **102** via a contract management device **104** and thereby maintain the archive manager **212**, which can store archived previous versions of the terms and conditions appendix sections **112**, as will be described in more detail hereinafter. The archive manager **212** can be configured as a database which can store previous versions of the terms and conditions appendix sections **112**, along with unique identifying information correlated to each version, such as a version number string.

[00043] In a related embodiment, the terms and conditions appendix section store **210** can be configured to store a plurality of different current drafts of the terms and conditions appendix section **112**, where each current draft of the terms and conditions appendix section **112** corresponds to a different business industry (pet grooming, lawn care, legal services, etc.) which requires specific language tailored to that industry. The subscriber form contract **114** can incorporate a specific current draft of the terms and conditions appendix section **112** depending on the type of business conducted by the subscriber **122** and the nature of the agreement contemplated by the subscriber form contract **114**. The terms and conditions appendix section store **210** can be configured to store each current draft of the terms and conditions appendix section **112** in a database, along with unique identifying information correlated to each version, such as a version number string.

[00044] In a related embodiment, the contract manager **214** can be configured to create a subscriber form contract **114** on behalf of the subscriber **122**. In certain embodiments, the contract manager **214** can be configured to allow a subscriber **122** to use a contract management device **104** to create a subscriber form contract **114**, which can then be hosted and/or stored by the contract manager **214**. In other embodiments, the subscriber **122** can upload a pre-existing subscriber form contract **114** to the contract management server **102** via a contract management device **104**.

[00045] In a related embodiment, the contract manager **214** can be configured to receive an instantiated terms and conditions appendix section **112** from the terms and conditions appendix section store **210**. In certain embodiments, the subscriber **122** can

select a desired version of the terms and condition appendix section **112** to instantiate based on the type of business covered by the subscriber form contract **114**.

[00046] In a related embodiment, the contract manager **214** can be configured to instantiate the terms and conditions appendix section **112** in the subscriber form contract **114** by modifying the subscriber form contract **114** to include a sentence referencing the terms and conditions appendix section **112** stored on the contract management server **102**, for example, by a version number string and/or date. By the language used in the included sentence, the instantiated terms and conditions appendix section **112** can be incorporated into the subscriber form contract **114**, thereby causing the terms and conditions appendix section **112** to function as the terms and conditions of the newly created modified subscriber contract **116** (e.g., “This contract hereby employs FairContractSM Terms & Conditions v3.04.027 to govern the rights and obligations of the parties”).

[00047] In a related embodiment, the contract manager **214** can be configured to instantiate the terms and conditions appendix section **112** by adding the full text of the terms and conditions appendix section **112** to the subscriber form contract **114**. For example, the modified subscriber contract **116** can include the terms and conditions appendix section **112** in a subsection or an appendix of the modified subscriber contract **116**.

[00048] In a related embodiment, the contract manager **214** can be configured to instantiate and incorporate a current version of the terms and conditions appendix section **112** from the terms and conditions appendix section store **210**. In certain embodiments, the contract manager **214** can be configured to instantiate and incorporate a previous version of the terms and conditions appendix section **112** from the archive manager **212**, depending on the preference of the contracting parties.

[00049] In a related embodiment, the contract manager **214** can be configured to allow users, such as the subscriber **122** and the contract partner **124**, to view both current and archived versions of the terms and conditions appendix sections **112** via a network **130**.

[00050] In a related embodiment, the contract manager **214** can be configured to replace the current version of the template terms and conditions appendix section in the terms and conditions appendix section store **210** with an updated version of the template terms and conditions appendix section; wherein the contract manager can be configured to archive the current version of the template terms and appendix section in the terms and conditions appendix section store **210**, in communication with the archive manager **212**.

[00051] In a related embodiment, the contract manager **214** can be configured to receive an acceptance input from the contract partner **124** to enter into an amendment to an existing completed contract when the current version of the terms and conditions appendix section is updated, such that the contract manager **214** is configured to update the completed contract with the new, amended terms and conditions, to create an amended contract, when the contract manager receives the acceptance input.

[00052] In a related embodiment, the contract manager **214** can be configured to automatically update the completed contract with an updated version of the terms and condition appendix section when the current version of the terms and conditions appendix section is updated.

[00053] In a related embodiment, as shown in FIG. **3**, a contract management device **104** can comprise:

- a) a processor **302**;
- b) a non-transitory memory **304**;
- c) an input/output **306**; and
- d) a contract controller **308**; all connected via
- e) a data bus **320**.

[00054] In a related embodiment, the contract controller **308** can be configured to enable the contract partner to view the modified subscriber contract and the completed contract.

[00055] In a related embodiment, both the subscriber **122** and the contract partner **124** can utilize the contract management device **104** to connect to and communicate with the contract management server **102** via a network **130**, thereby allowing the contract parties to view the modified subscriber contract **116** prior to acceptance.

[00056] In a related embodiment, the contract partner **124** can use the contract management device **104** to electronically accept, i.e. agree to and enter into, the modified subscriber contract **116** via the contract controller **308**. If accepted, the accepted modified subscriber contract **116** thereby becomes the completed contract **118**, with the terms and conditions appendix section **112** functioning as the terms and conditions of the completed contract **118**, as previously discussed.

[00057] In a related embodiment, the contract controller **308** can be configured to receive a contract accept input from the contract partner **124**, when the contract partner **124** accepts the modified subscriber contract.

[00058] In a related embodiment, the contract controller **308** can be configured to receive a subscriber accept input from the subscriber **122** when the subscriber **122** accepts the modified subscriber contract.

[00059] In a related embodiment, the contract controller **308** can be configured to receive a partner amendment accept input from the contract partner **124**, when the contract partner **124** accepts an amendment to the completed contract.

[00060] In a related embodiment, the contract controller **308** can be configured to receive a subscriber amendment accept input from the subscriber when the subscriber accepts an amendment to the completed contract.

[00061] In certain embodiments, the modified subscriber contract **116** immediately becomes the completed contract **118** upon acceptance by the contract partner **124**. In other embodiments, the modified subscriber contract **116** must be accepted by both the subscriber **122** and the contract partner **124** before it becomes the completed contract **118**.

[00062] In a related embodiment, the contract controller **308** can be configured to facilitate acceptance of the modified subscriber contract **116** using any suitable method, including a digital stylus, an electronic signature, pressing a virtual button on a smartphone screen, fingerprint recognition, and facial recognition.

[00063] In a related embodiment, the terms and conditions appendix section **112**, the subscriber form contract **114**, the modified subscriber contract **116**, and the completed contract **118** can each be stored and processed as a data structure, for example as an XML or XML DOM object, text, or composite data structure, any of which can be output to a text or document representation, such as PDF.

[00064] In a related embodiment, the service provider **120** can utilize the contract management device **104** to connect with the contract management server **102**. The contract controller **308** can be configured to communicate electronically with the contract manager **214**, allowing the contract manager **214** to view and update versions of the terms and conditions appendix section **112** stored on the contract management server **102** as well as move versions of the terms and conditions appendix section **112** from the terms and conditions appendix section store **210** to the archive manager **212**, and vice versa.

[00065] In related embodiments, the contract management device **104** can include configurations such as:

- a) a web application, executing in a Web browser;
- b) a tablet app, executing on a tablet device, such as for example an Android or iOS tablet device;
- c) a mobile app, executing on a mobile device, such as for example an Android phone or iPhone, or any wearable mobile device;
- d) a desktop application, executing on a personal computer, or similar device; or
- e) an embedded application, executing on a processing device, such as for example a smart TV, a game console or other system.

[00066] It shall be understood that an executing instance of an embodiment of the contract management system **100**, as shown in FIG. **1**, can include a plurality of contract management devices **104**, which are each tied to one or more contract partners **124** or subscribers **122**.

[00067] Similarly, an executing instance of an embodiment of the contract management system **100**, as shown in FIG. **1**, can include a plurality of contract management servers **102**.

[00068] In a related embodiment, as shown in FIG. **4**, a computer-implemented method for managing contracts **400** can include:

- a) Selecting form contract **402**, comprising selecting a desired subscriber form contract;
- b) Incorporating terms and conditions **404**, comprising adding language incorporating a current version of a terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;
- c) Presenting a modified contract **406**, comprising presenting the modified subscriber contract to a subscriber and a contract partner for review;
- d) Accepting a modified contract **408**, comprising receiving acceptance of the modified subscriber contract by the contract partner **124**, thereby creating a completed contract;
- e) Amending modified contract **410**, comprising prompting the contract partner **124** to review an amendment to the completed contract when an updated version of the terms and conditions appendix section is released; and
- f) Accepting amended contract **412**, comprising receiving acceptance from the contract partner **124** of the amendment to the completed contract, wherein the current version of the terms and conditions appendix section is replaced by the updated version of the terms and conditions appendix section.

[00069] In a related embodiment, the contract partner **124** can accept the modified subscriber contract **116** by communicating with the contract manager **214** via the contract controller **308**.

[00070] In a further related embodiment, the subscriber **124** can accept the modified subscriber contract **116** by communicating with the contract manager **214** via the contract controller **308**, prior to obtaining contract partner **124** acceptance, such that the contract partner **124** can accept the modified subscriber contract **116** only when the modified subscriber contract **116** has been accepted by the subscriber **124**.

[00071] In a related embodiment, the completed contract **118** is created when only the contract partner **124** accepts the modified subscriber contract **116**. For example, the modified subscriber contract **116** can be configured as an offer made by the subscriber that can be accepted by the contract partner **124** (e.g., a form to be filled out by the contract partner **124** using a Web browser). However, in certain embodiments, the completed contract is not created until both the contract partner **124** and the subscriber **122** accept the modified subscriber contract **116**.

[00072] In a related embodiment, the subscriber **122** can accept, and thereby agree to, the modified subscriber contract **116** via the contract controller **308**, as previously described.

[00073] In a related embodiment, acceptance of an amendment to the completed contract **118**, such as an agreement to update the terms and conditions to an updated version of the terms and conditions appendix section **112**, can be performed via the contract management devices **104**. In certain embodiments, the contract controller **308** can be configured such that amendments can be accepted in a manner that is similar to how the modified subscriber contract **116** is accepted. In certain embodiments, accepting an amendment can be performed merely by pressing a button on a smartphone screen, similar to how apps can be updated on smartphones.

[00074] In a related embodiment, both the subscriber **122** and the contract partner **124** can be prompted to accept an amendment to the completed contract **118**. For example,

the contract management server **102** can send out prompts to the subscriber **122** and the contract partner **124** via the contract management devices **104**, notifying the contracting parties that the version of the terms and conditions appendix section **112** incorporated in their completed contract **118** has been updated and encouraging the contracting parties to review and, subject to their approval, accept the amendment to the completed contract **118**, to incorporate the updated version of the terms and conditions appendix section **112**.

[00075] In certain embodiments, only the contract partner **124** needs to accept an amendment in order to amend the completed contract **118**. For example, the subscriber **122** can choose to offer an amendment to the completed contract **118** to, for example, incorporate an updated version of the terms and conditions appendix section **112**. The contract partner **124** can then unilaterally accept the amendment.

[00076] In a related embodiment, the completed contract **118** need not be amended by the contract parties, even after an updated version of the terms and conditions appendix section **112** is released.

[00077] In a related embodiment, the computer-implemented method for managing contracts **400** can further include:

- a) prompting the contract partner to accept an amendment to the completed contract when an updated version of the terms and conditions appendix section is released; and
- b) receiving acceptance to an amendment to the completed contract from the contract partner, and then replacing the current version of the terms and conditions appendix section in the completed contract with the updated version of the terms and conditions appendix section.

[00078] In a related embodiment, the computer-implemented method for managing contracts **400** can further include:

- a) adding language to the subscriber form contract to specify that an updated version of the terms and conditions appendix section is automatically incorporated into the completed contract upon release; and
- b) automatically incorporating the updated version of the terms and conditions appendix section into the completed contract.

[00079] In a related embodiment, as shown in FIG. 5, a computer-implemented method for managing contracts **500** can comprise:

- a) Selecting form contract **502**, comprising selecting a desired subscriber form contract;
- b) Incorporating terms and conditions **504**, comprising adding language to the subscriber form contract incorporating a current version of a terms and conditions appendix section into the subscriber form contract **504**, thereby creating a modified subscriber contract;
- c) Adding automation clause **506**, comprising adding language to the subscriber form contract whereby an updated version of the terms and conditions appendix section is automatically incorporated into the completed contract upon release;
- d) Presenting modified contract **508**, comprising presenting the modified subscriber contract to the subscriber and contract partner for review;
- e) Accepting modified contract **510**, comprising receiving acceptance of the modified subscriber contract from the contract partner, and then creating a completed contract; and
- f) Automatically incorporating modified terms and conditions **512**, comprising automatically incorporating an updated version of the terms and conditions appendix section into the completed contract.

[00080] In a related embodiment, modified subscriber contract **116** can be configured to automatically incorporate updated versions of the terms and conditions appendix section **112** by the inclusion of a sentence specifically stating that such is the desire of the contracting parties (e.g., “This contract hereby automatically incorporates the most recent release of FairContractSM Terms & Conditions v3 as the governing Terms and Conditions...”). Such a facility for automatically updating completed contracts **118** may be useful in industries that are relatively new and changing quickly, such as internet marketing or ride sharing services.

[00081] In a related embodiment, as shown in FIG. **6**, a computer-implemented method for managing contracts **600** can comprise:

- a) Selecting current terms and conditions **602**, comprising selecting a current version of a terms and conditions appendix section;
- b) Reviewing terms and conditions **604**, comprising reviewing the current version of the terms and conditions appendix section;
- c) Revising terms and conditions **606**, comprising revising the current version of the terms and conditions appendix section, thereby creating an updated version of the terms and conditions appendix section;
- d) Archiving current terms and conditions **608**, comprising archiving the current version of the terms and conditions appendix section; and
- e) Releasing updated terms and conditions **610**, comprising releasing the updated version of the terms and conditions appendix section, such that the updated version of the terms and conditions appendix section becomes the current version of the terms and conditions appendix section.

[00082] In a related embodiment, the computer-implemented method for archiving contracts **600** begins by a selecting a current version of the terms and conditions appendix section **112** from the terms and conditions appendix section store **210** for review. The terms and conditions appendix section **112** can be reviewed by the service provider **120** and/or

one or more professionals or experts in the industry to which the selected version of terms and conditions appendix section **112** pertains. The terms and conditions appendix section **112** can be reviewed with the goal of keeping the terms and conditions appendix section **112** in line with evolution in the industry, statutory and regulatory changes, and input from contracting parties.

[00083] In a related embodiment, once the review has been performed, the terms and conditions appendix section **112** can be revised and updated accordingly, thereby creating an updated version of the terms and conditions appendix section **112**. The updated version of the terms and conditions appendix section **112** can be released and stored in the terms and conditions appendix section store **210**. Thereafter, the current version of the terms and conditions appendix section **112** becomes a previous version, and can be moved by the contract manager **214** to the archive manager **212**, where the previous version can be placed in a database along with an identifying version number string. Previous versions of terms and conditions appendix sections **112** can be available for viewing to parties such as the subscriber **122** and the contract partner **124** via contract management devices **104**.

[00084] In a related embodiment, as shown in FIG. **7**, a contract management system **700** can comprise:

- a) a terms and conditions server **704**, which can be configured to store a template terms and conditions appendix section **112**; and
- b) a subscriber server **706**, which can be configured to create and store a subscriber form contract **114**, wherein the subscriber server **706** is in communication with the terms and conditions server **704**;

wherein the subscriber server **706** is configured to receive an instantiated terms and conditions appendix section **112**, which is a copy of the template terms and conditions appendix section, such that the subscriber server **706** is configured to incorporate the terms and conditions appendix section **112** into the subscriber form contract **114**, thereby creating a modified subscriber contract **116**;

wherein the subscriber server **706** is configured to create a completed contract **118** when the modified subscriber contract **116** is accepted by a contract partner **124**.

[00085] In a related embodiment, a subscriber **122** can choose to utilize a subscriber server **706** to implement the system **700**. The subscriber server **706** can be configured to host and/or store the subscriber form contract **114** and the modified subscriber contract **116**. In certain embodiments, the subscriber server **706** can also be configured to store the completed contract **118**.

[00086] In a related embodiment, as shown in FIG. **8**, the subscriber server **706** can comprise:

- a) a processor **802**;
- b) a non-transitory memory **804**;
- c) an input/output **806**;
- d) a subscriber form contract store **810**, which can be configured to store the subscriber form contract **114** and the modified subscriber contract **116**; and
- e) a contract manager **814**, which is configured to allow the contract partner **124** to accept the modified subscriber contract **116**; all connected via
- f) a data bus **820**.

[00087] In a related embodiment, as shown in FIG. **9**, the terms and conditions server **704** can comprise:

- a) a processor **902**;
- b) a non-transitory memory **904**;
- c) an input/output **906**;
- d) a terms and conditions manager **914**;

- e) a terms and conditions appendix section store **910**, which is configured to store a current version of the template terms and conditions appendix section **112**; and
- f) an archive manager **912**, which is configured to store previous versions of the template terms and conditions appendix section **112**;

wherein the terms and conditions manager **914** is configured to replace the current version of the template terms and conditions appendix section **112** in the terms and conditions appendix section store **910** with an updated version of the template terms and conditions appendix section **112**;

wherein the terms and conditions manager **914** is configured to archive the current version of the template terms and appendix section **112** in the terms and conditions appendix section store **910**, in communication with the archive manager.

[00088] In a related embodiment, the subscriber **122** can control the subscriber server **706** and determine what documents are stored in the subscriber form contract store **810**. The subscriber form contract store **810** can be configured to store at least one subscriber form contract **114**, and can be configured to store a version of the subscriber form contract **114** that has instantiated and incorporated a terms and conditions appendix section **112**. In certain embodiments, a plurality of subscriber form contracts **114** and modified subscriber contracts **116** can be stored in the subscriber form contract store **810**.

[00089] In a related embodiment, the contract manager **814** can be configured to receive an instantiated terms and conditions appendix section **112** from the terms and conditions appendix section store **210**. In certain embodiments, the subscriber **122** can select a desired version of the terms and condition appendix section **112** to instantiate based on the type of business covered by the subscriber form contract **114**.

[00090] In a related embodiment, the contract manager **814** can be configured to incorporate the terms and conditions appendix section **112** into the subscriber form contract **114** by modifying the subscriber form contract **114** by adding language, such as for

example a sentence, to the subscriber form contract **114**, which language references the template terms and conditions appendix section **112** stored on the terms and conditions server **704**, for example by a name or UUID, with a version number string and/or date. By the language used in the included sentence, the template terms and conditions appendix section **112** can be incorporated into the subscriber form contract **114** by reference, thereby causing the terms and conditions appendix section **112** to function as the terms and conditions of the newly created modified subscriber contract **116** (e.g., “This contract hereby employs FairContractSM Terms & Conditions v3.04.027 as the governing Terms and Conditions...”).

[00091] In a related embodiment, the contract manager **814** can be configured to instantiate the terms and conditions appendix section **112** and add the full text of the instantiated terms and conditions appendix section **112** to the subscriber form contract **114**. For example, the modified subscriber contract **116** can include the terms and conditions appendix section **112** in a subsection or an appendix of the modified subscriber contract **116**.

[00092] In a related embodiment, the contract manager **814** can be configured to instantiate and incorporate a current version of the terms and conditions appendix section **112** from the terms and conditions appendix section store **210**. In certain embodiments, the contract manager **214** can be configured to instantiate and incorporate a previous version of the terms and conditions appendix section **112** from the archive manager **212**, depending on the preference of the contracting parties.

[00093] In a related embodiment, the contract manager **814** can be configured to allow users, such as the subscriber **122** and the contract partner **124**, to view both current and archived versions of the terms and conditions appendix sections **112** via a network **130**.

[00094] FIGS. **1 - 9** are block diagrams and flowcharts, methods, devices, systems, apparatuses, and computer program products according to various embodiments of the present invention. It shall be understood that each block or step of the block diagram, flowchart and control flow illustrations, and combinations of blocks in the block diagram, flowchart and control flow illustrations, can be implemented by computer program

instructions or other means. Although computer program instructions are discussed, an apparatus or system according to the present invention can include other means, such as hardware or some combination of hardware and software, including one or more processors or controllers, for performing the disclosed functions.

[00095] In this regard, FIGS. **1 - 9** depict the computer devices of various embodiments, each containing several of the key components of a general-purpose computer by which an embodiment of the present invention may be implemented. Those of ordinary skill in the art will appreciate that a computer can include many components. However, it is not necessary that all of these generally conventional components be shown in order to disclose an illustrative embodiment for practicing the invention. The general-purpose computer can include a processing unit and a system memory, which may include various forms of non-transitory storage media such as random access memory (RAM) and read-only memory (ROM). The computer also may include nonvolatile storage memory, such as a hard disk drive, where additional data can be stored.

[00096] FIGS. **1** and **7** show depictions of embodiments of the contract management system **100 700**, including the contract management server **102**, the terms and conditions server **704**, and the subscriber server **706**. In this relation, a server shall be understood to represent a general computing capability that can be physically manifested as one, two, or a plurality of individual physical computing devices, located at one or several physical locations. A server can for example be manifested as a shared computational use of one single desktop computer, a dedicated server, a cluster of rack-mounted physical servers, a datacenter, or network of datacenters, each such datacenter containing a plurality of physical servers, or a computing cloud, such as Amazon EC2 or Microsoft Azure.

[00097] It shall be understood that the above-mentioned components of the contract management server **102**, terms and conditions server **704** and the subscriber server **706** are to be interpreted in the most general manner.

[00098] For example, the processors **202 302 802 902**, can each respectively include a single physical microprocessor or microcontroller, a cluster of processors, a datacenter or a cluster of datacenters, a computing cloud service, and the like.

[00099] In a further example, the non-transitory memory **204 304 804 904** can each respectively include various forms of non-transitory storage media, including random access memory and other forms of dynamic storage, and hard disks, hard disk clusters, cloud storage services, and other forms of long-term storage. Similarly, the input/output **206 306 806 906** can each respectively include a plurality of well-known input/output devices, such as screens, keyboards, pointing devices, motion trackers, communication ports, and so forth.

[000100] Furthermore, it shall be understood that the servers **102 704 706** and the contract management device **104** can each respectively include a number of other components that are well known in the art of general computer devices, and therefore shall not be further described herein. This can include system access to common functions and hardware, such as for example via operating system layers such as Windows, Linux, and similar operating system software, but can also include configurations wherein application services are executing directly on server hardware or via a hardware abstraction layer other than a complete operating system.

[000101] An embodiment of the present invention can also include one or more input or output components, such as a mouse, keyboard, monitor, and the like. A display can be provided for viewing text and graphical data, as well as a user interface to allow a user to request specific operations. Furthermore, an embodiment of the present invention may be connected to one or more remote computers via a network interface. The connection may be over a local area network (LAN) wide area network (WAN), and can include all of the necessary circuitry for such a connection.

[000102] In a related embodiment, the contract management device **104** communicates with the servers **102 704 706** over a network **130**, which can include the general Internet, a Wide Area Network or a Local Area Network, or another form of communication network, transmitted on wired or wireless connections. Wireless networks can for example include Ethernet, Wi-Fi, Bluetooth, ZigBee, and NFC. The communication can be transferred via a secure, encrypted communication protocol.

[000103] Typically, computer program instructions may be loaded onto the computer or other general-purpose programmable machine to produce a specialized machine, such that the instructions that execute on the computer or other programmable machine create means for implementing the functions specified in the block diagrams, schematic diagrams or flowcharts. Such computer program instructions may also be stored in a computer-readable medium that when loaded into a computer or other programmable machine can direct the machine to function in a particular manner, such that the instructions stored in the computer-readable medium produce an article of manufacture including instruction means that implement the functions specified in the block diagrams, schematic diagrams or flowcharts.

[000104] In addition, the computer program instructions may be loaded into a computer or other programmable machine to cause a series of operational steps to be performed by the computer or other programmable machine to produce a computer-implemented process, such that the instructions that execute on the computer or other programmable machine provide steps for implementing the functions specified in the block diagram, schematic diagram, flowchart block or step.

[000105] Accordingly, blocks or steps of the block diagram, flowchart or control flow illustrations support combinations of means for performing the specified functions, combinations of steps for performing the specified functions and program instruction means for performing the specified functions. It will also be understood that each block or step of the block diagrams, schematic diagrams or flowcharts, as well as combinations of blocks or steps, can be implemented by special purpose hardware-based computer systems, or combinations of special purpose hardware and computer instructions, that perform the specified functions or steps.

[000106] As an example, provided for purposes of illustration only, a data input software tool of a search engine application can be a representative means for receiving a query including one or more search terms. Similar software tools of applications, or implementations of embodiments of the present invention, can be means for performing the specified functions. For example, an embodiment of the present invention may include

computer software for interfacing a processing element with a user-controlled input device, such as a mouse, keyboard, touch screen display, scanner, or the like. Similarly, an output of an embodiment of the present invention may include, for example, a combination of display software, video card hardware, and display hardware. A processing element may include, for example, a controller or microprocessor, such as a central processing unit (CPU), arithmetic logic unit (ALU), or control unit.

[000107] Here has thus been described a multitude of embodiments of the ... device, and methods related thereto, which can be employed in numerous modes of usage.

[000108] The many features and advantages of the invention are apparent from the detailed specification, and thus, it is intended by the appended claims to cover all such features and advantages of the invention, which fall within the true spirit and scope of the invention.

[000109] For example, alternative embodiments can reconfigure or combine the components of the servers **102 704 706** and the contract management device **104**. The components of the servers **102 704 706** can be distributed over a plurality of physical, logical, or virtual servers. Parts or all of the components of the contract management device **104** can be configured to operate in the servers **102 704 706**, whereby the contract management device **104** for example can function as a thin client, performing only graphical user interface presentation and input/output functions. Alternatively, parts or all of the components of the servers **102 704 706** can be configured to operate in the contract management device **104**.

[000110] Many such alternative configurations are readily apparent, and should be considered fully included in this specification and the claims appended hereto. Accordingly, since numerous modifications and variations will readily occur to those skilled in the art, the invention is not limited to the exact construction and operation illustrated and described, and thus, all suitable modifications and equivalents may be resorted to, falling within the scope of the invention.

CLAIMS

What is claimed is:

1. A contract management system, comprising:

a contract management server, which is configured to store a template terms and conditions appendix section;

wherein the contract management server is configured to create a subscriber form contract, such that the contract management server is configured to incorporate the template terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;

wherein the contract management server is configured to create a completed contract when the modified subscriber contract is accepted by a contract partner.

2. The contract management system of claim 1, wherein the contract management server is configured to incorporate the template terms and conditions appendix section into the subscriber form contract by adding a sentence to the subscriber form contract, such that the sentence references the template terms and conditions appendix section.
3. The contract management system of claim 1, wherein the contract management server is configured to incorporate the template terms and conditions appendix section into the subscriber form contract by creating an instantiated terms and conditions appendix section, which is a copy of the template terms and conditions appendix section, such that the contract management server is configured to add the instantiated terms and conditions appendix section to the subscriber form contract.
4. The contract management system of claim 1, wherein the contract management server comprises:

- a) a processor;
 - b) a non-transitory memory;
 - c) an input/output component;
 - d) a terms and conditions appendix section store, which is configured to store a current version of the template terms and conditions appendix section;
 - e) an archive manager, which is configured to store previous versions of the template terms and conditions appendix section; and
 - f) a contract manager; all connected via
 - g) a data bus.
5. The contract management system of claim 4, wherein the contract manager is configured to replace the current version of the template terms and conditions appendix section in the terms and conditions appendix section store with an updated version of the template terms and conditions appendix section; wherein the contract manager is configured to archive the current version of the template terms and appendix section in the terms and conditions appendix section store, in communication with the archive manager.
6. The contract management system of claim 4, wherein the contract manager is configured to receive an accept input from the contract partner to accept a terms and conditions amendment to the completed contract when the current version of the terms and conditions appendix section is updated, such that the contract manager is configured to update the completed contract with the terms and conditions amendment, to create an amended contract, when the contract manager has received the accept input.
7. The contract management system of claim 4, wherein the contract manager is configured to automatically update the completed contract with an updated version

of the terms and condition appendix section when the current version of the terms and conditions appendix section is updated.

8. The contract management system of claim 1, further comprising a contract management device, which is connected to the contract management server, wherein the contract management device further comprises:
 - a) a processor;
 - b) a non-transitory memory;
 - c) an input/output; and
 - d) a contract controller, which is configured to allow the contract partner to view the modified subscriber contract and the completed contract; all connected via
 - e) a data bus.
9. The contract management system of claim 8, wherein the contract controller is configured to receive a contract accept input from the contract partner, when the contract partner accepts the modified subscriber contract.
10. The contract management system of claim 8, wherein the contract controller is configured to receive a subscriber accept input from the subscriber when the subscriber accepts the modified subscriber contract.
11. The contract management system of claim 8, wherein the contract controller is configured to receive a partner amendment accept input from the contract partner, when the contract partner accepts an amendment to the completed contract.

12. The contract management system of claim 8, wherein the contract controller is configured to receive a subscriber amendment accept input from the subscriber when the subscriber accepts an amendment to the completed contract.

13. A contract management system, comprising:

- a) a terms and conditions server, which is configured to store a template terms and conditions appendix section; and
- b) a subscriber server, which is configured to create and store a subscriber form contract, wherein the subscriber server is connected to the terms and conditions server;

wherein the subscriber server is configured to create the subscriber form contract, such that the subscriber server is configured to incorporate the template terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;

wherein the subscriber server is configured to create a completed contract when the modified subscriber contract is accepted by a contract partner.

14. The contract management system of claim 13, wherein the subscriber server further comprises:

- a) a processor;
- b) a non-transitory memory;
- c) an input/output;
- d) a subscriber form contract store, which is configured to store the subscriber form contract and the modified subscriber contract; and
- e) a contract manager, which is configured to allow the contract partner to accept the modified subscriber contract; all connected via
- f) a data bus.

15. The contract management system of claim 13, wherein the terms and conditions server further comprises:

- a) a terms and conditions manager;
- b) a terms and conditions appendix section store, which is configured to store a current version of the template terms and conditions appendix section; and
- c) an archive manager, which is configured to store previous versions of the template terms and conditions appendix section;

wherein the terms and conditions manager is configured to replace the current version of the template terms and conditions appendix section in the terms and conditions appendix section store with an updated version of the template terms and conditions appendix section; and

wherein the terms and conditions manager is configured to archive the current version of the template terms and appendix section in the terms and conditions appendix section store, in communication with the archive manager.

16. A computer-implemented method for managing contracts, comprising:

- a) selecting form contract, comprising selecting a desired subscriber form contract;
- b) incorporating terms and conditions, comprising adding language to the subscriber form contract incorporating a current version of a terms and conditions appendix section into the subscriber form contract, thereby creating a modified subscriber contract;
- c) presenting modified contract, comprising presenting the modified subscriber contract to a subscriber and a contract partner for review; and
- d) accepting modified contract, comprising receiving partner acceptance of the modified subscriber contract from the contract partner, and then creating a completed contract.

17. The computer-implemented method for managing contracts of claim 16, further comprising receiving subscriber acceptance of the modified subscriber contract from the subscriber, prior to obtaining partner acceptance.
18. The computer-implemented method for managing contracts of claim 16, further comprising:
- a) prompting the contract partner to accept an amendment to the completed contract when an updated version of the terms and conditions appendix section is released; and
 - b) receiving acceptance of an amendment to the completed contract from the contract partner, and then replacing the current version of the terms and conditions appendix section in the completed contract with the updated version of the terms and conditions appendix section.
19. The computer-implemented method for managing contracts of claim 16, further comprising:
- a) adding language to the subscriber form contract to specify that an updated version of the terms and conditions appendix section is automatically incorporated into the completed contract upon release; and
 - b) automatically incorporating the updated version of the terms and conditions appendix section into the completed contract.
20. The computer-implemented method for managing contracts of claim 16, further comprising:
- a) reviewing terms and conditions, comprising reviewing the current version of the terms and conditions appendix section;

- b) revising terms and conditions, comprising revising the current version of the terms and conditions appendix section, thereby creating an updated version of the terms and conditions appendix section;
- c) archiving current terms and conditions, comprising archiving the current version of the terms and conditions appendix section; and
- d) releasing updated terms and conditions, comprising releasing the updated version of the terms and conditions appendix section, such that the updated version of the terms and conditions appendix section becomes the current version of the terms and conditions appendix section.

FIG. 1

Contract Management System

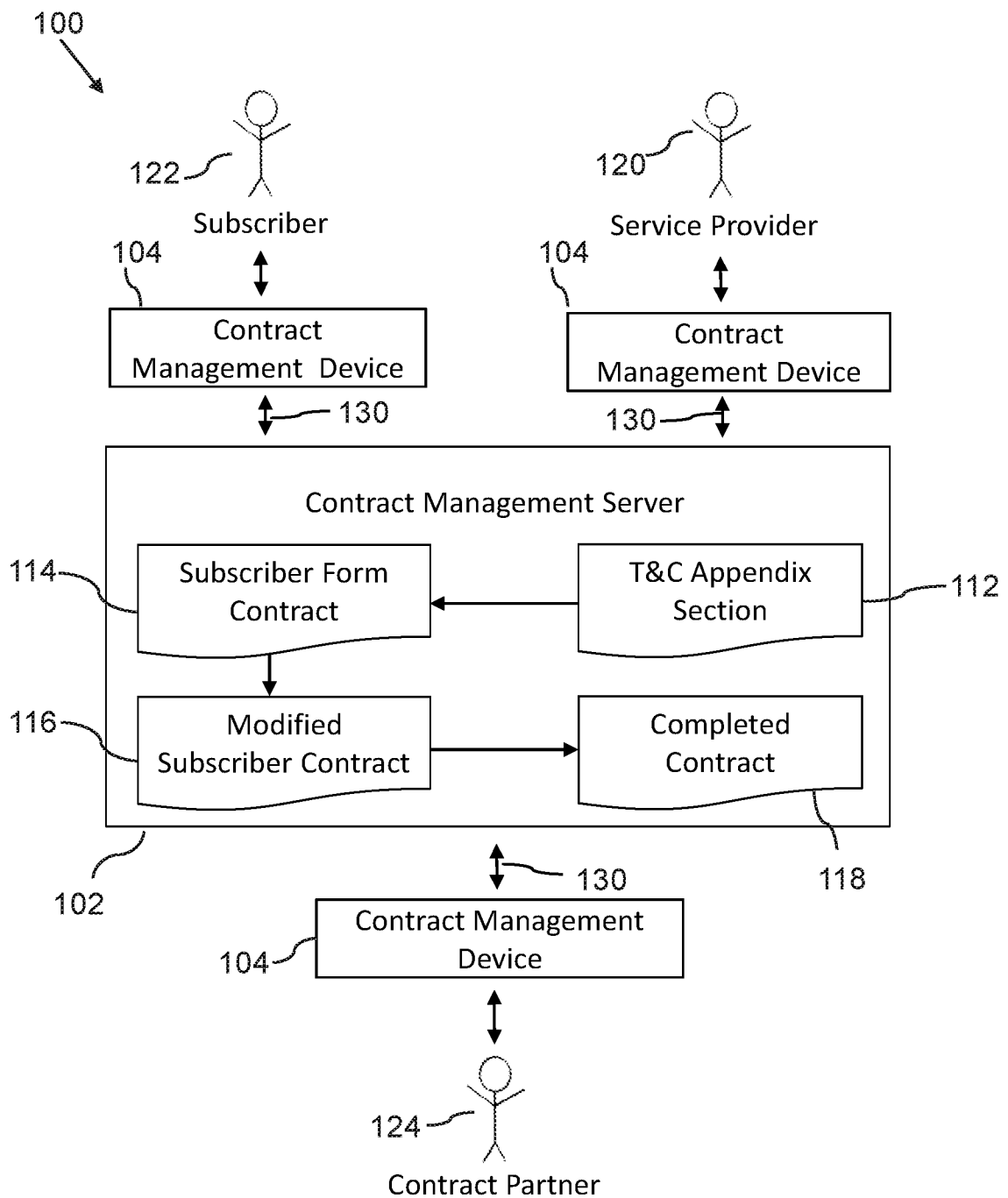


FIG. 2

Contract Management Server

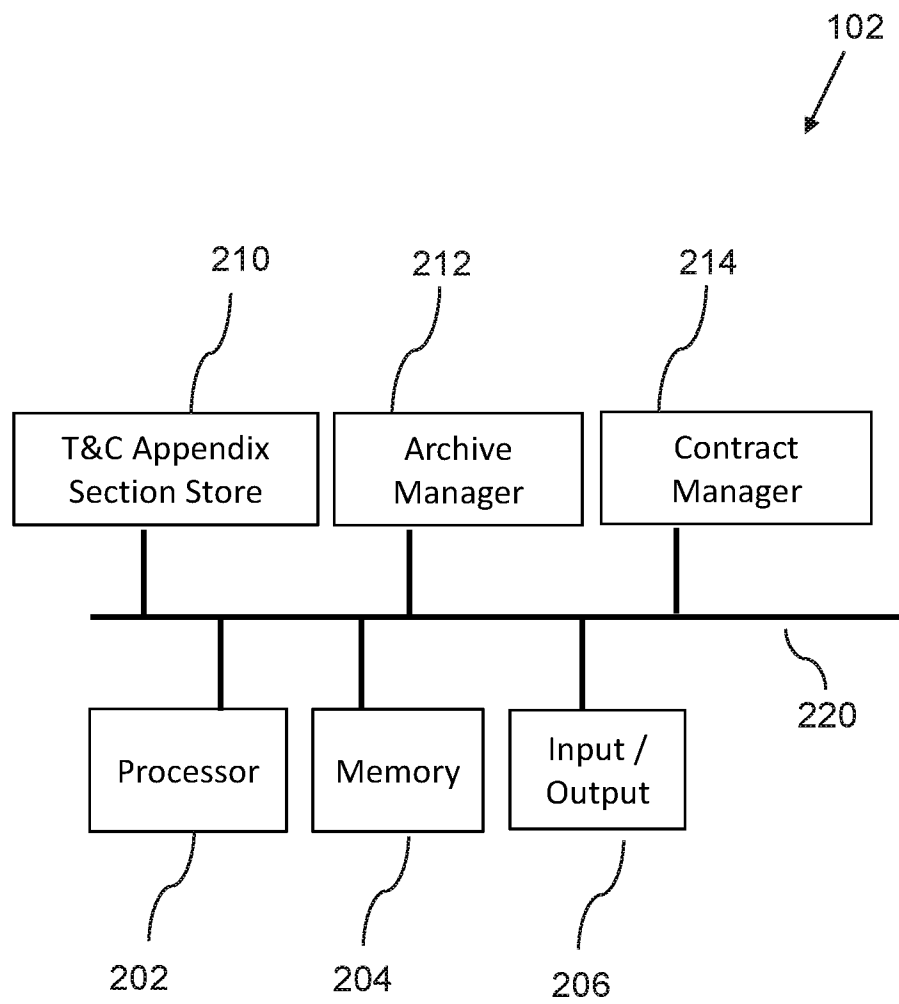


FIG. 3

Contract Management Device

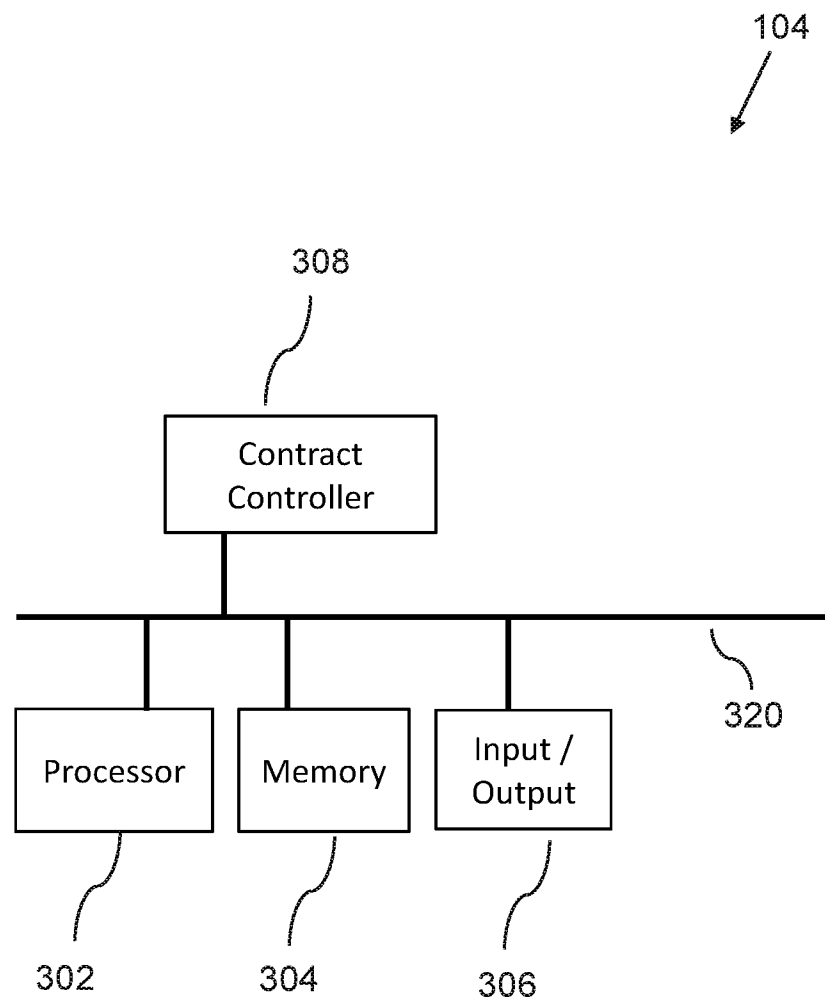


FIG. 4

Method for managing contracts

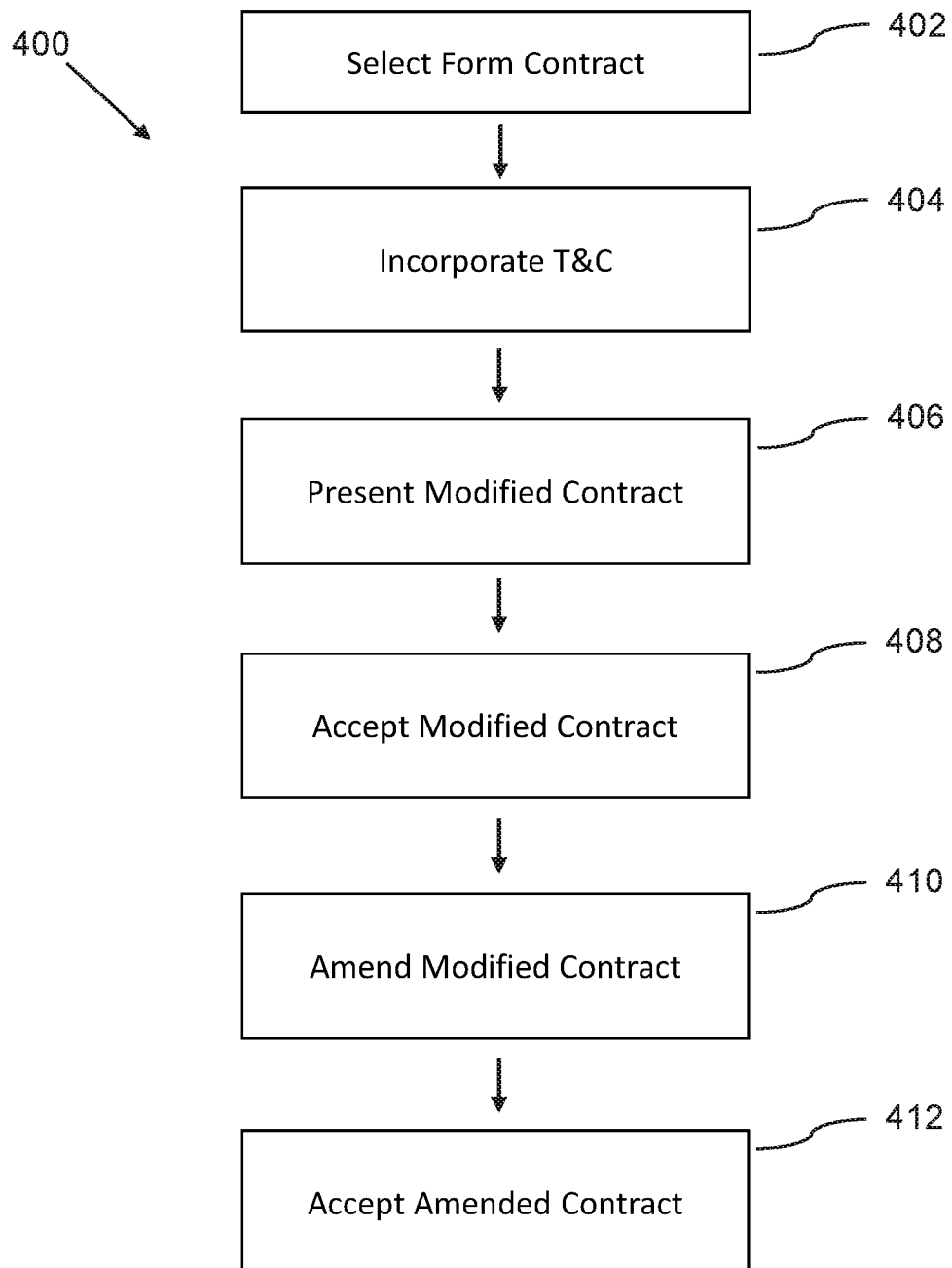


FIG. 5

Method for managing contracts

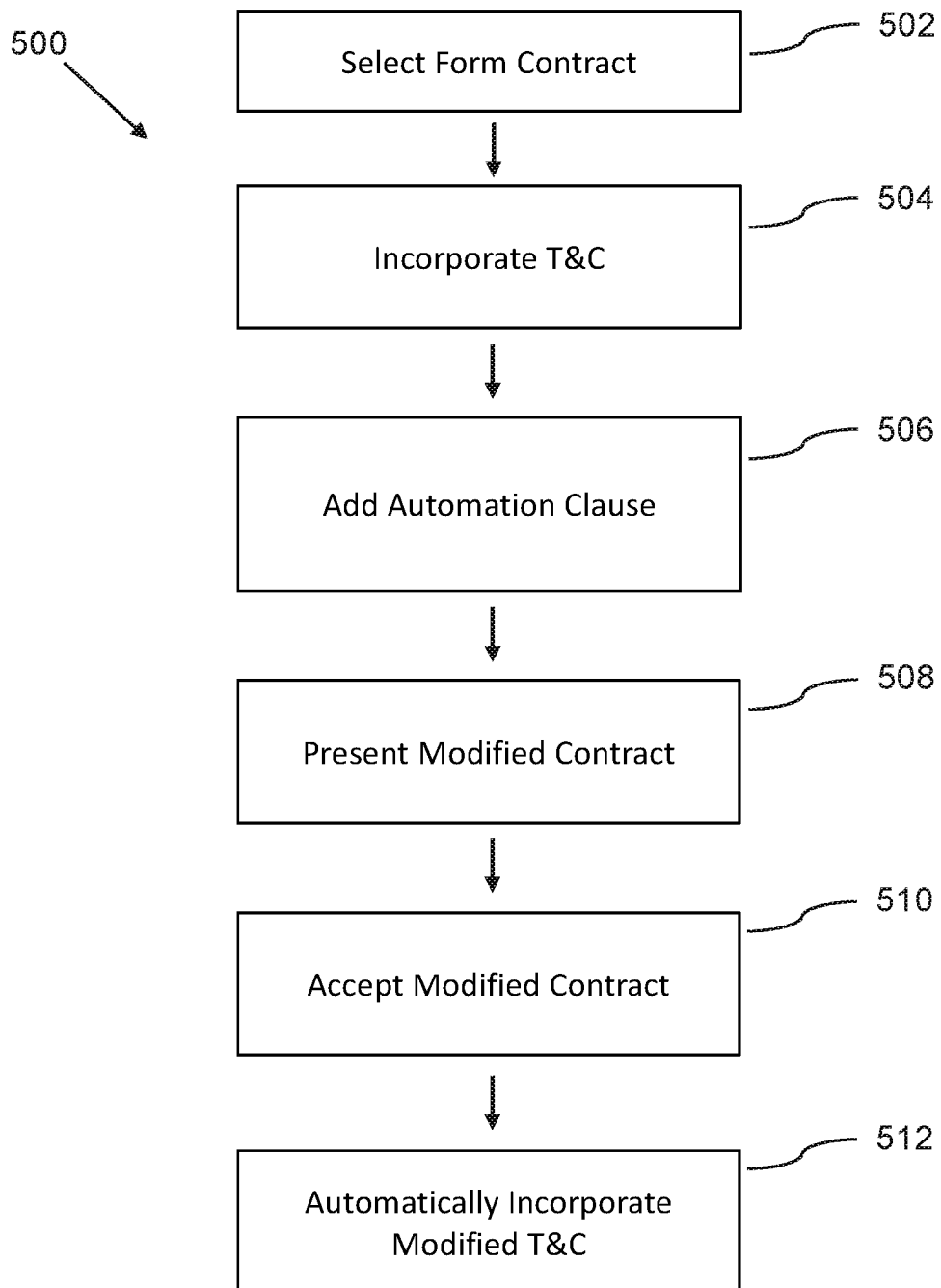


FIG. 6

Method for managing contracts

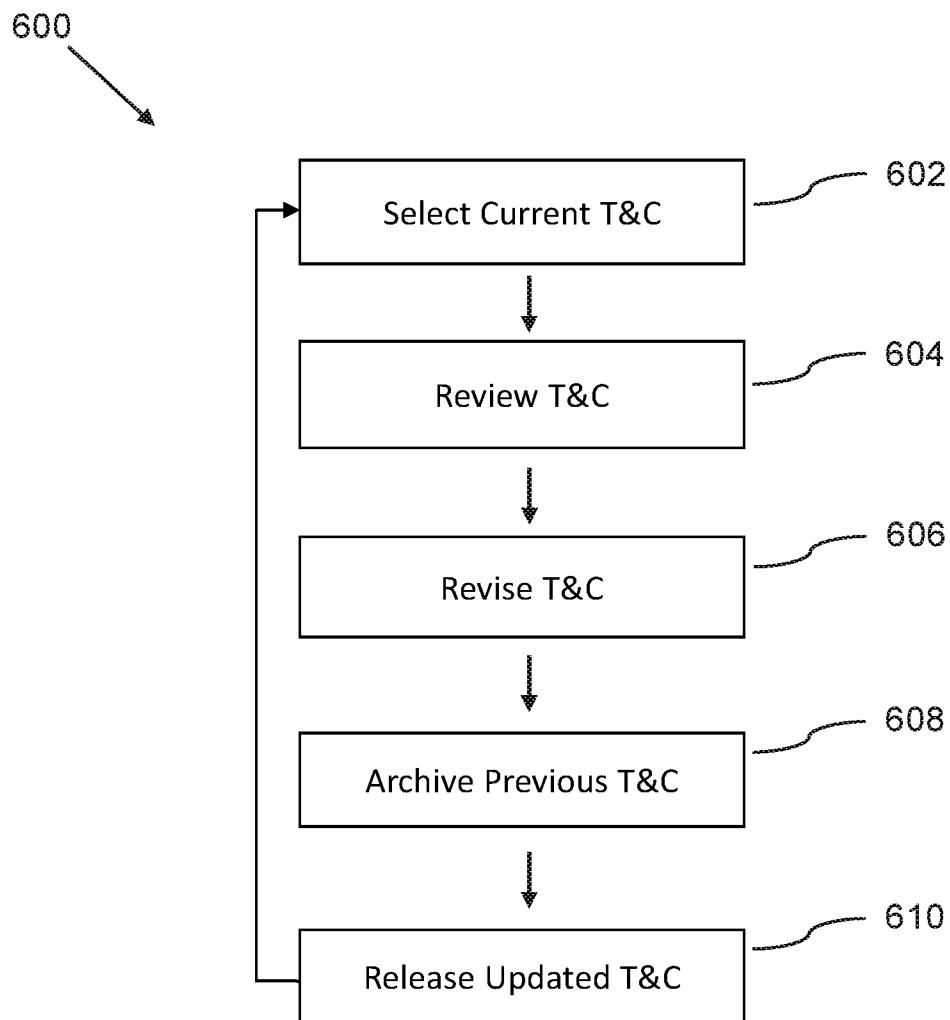


FIG. 7

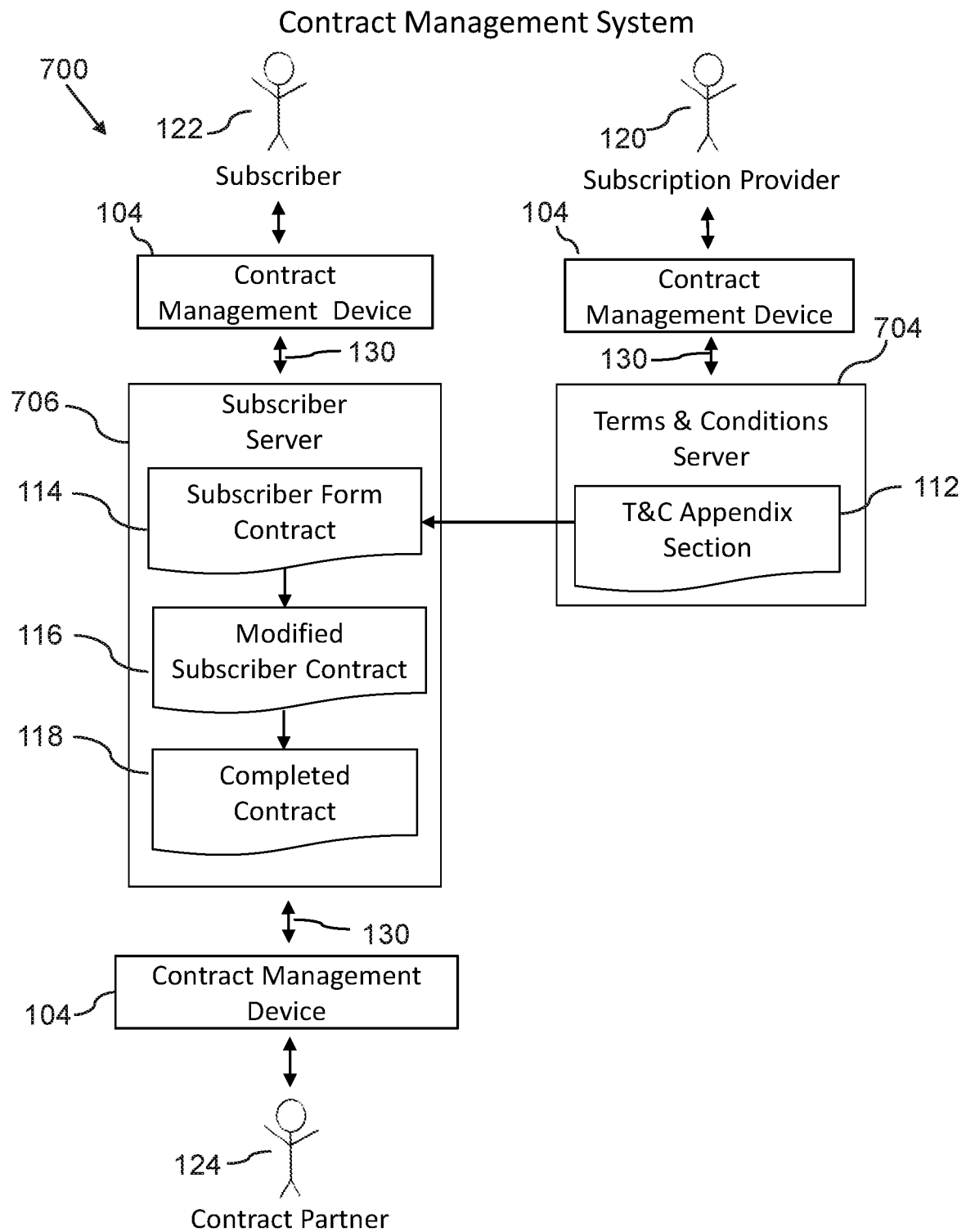


FIG. 8

Subscriber Server

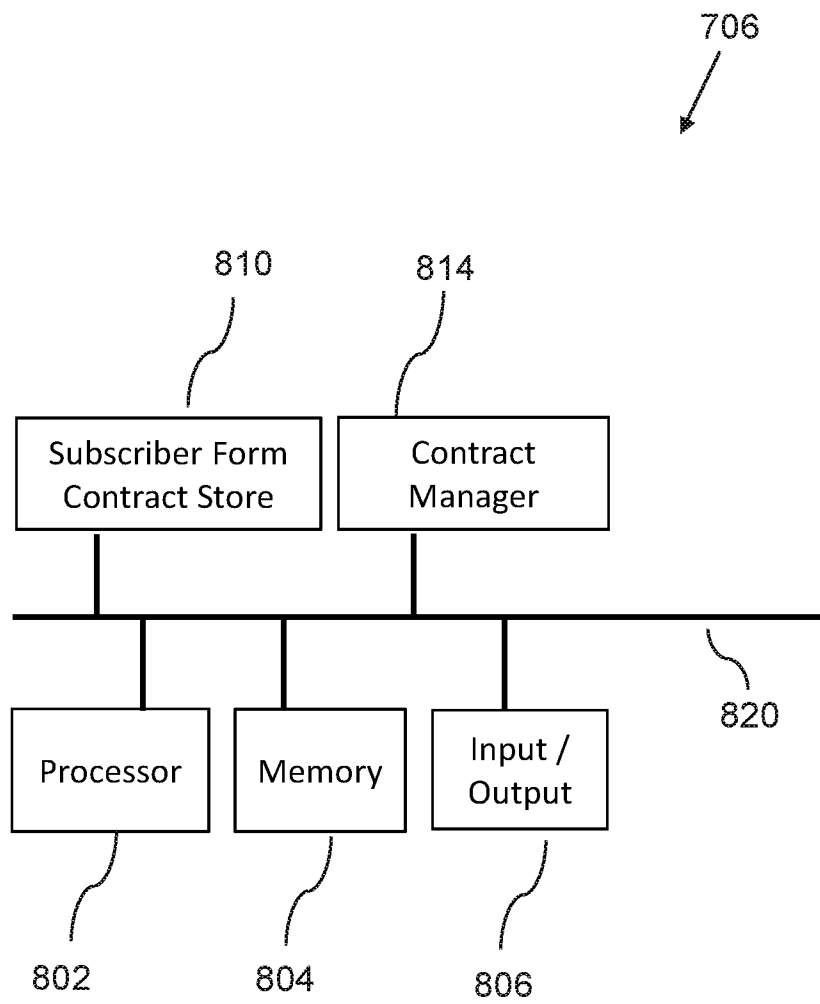
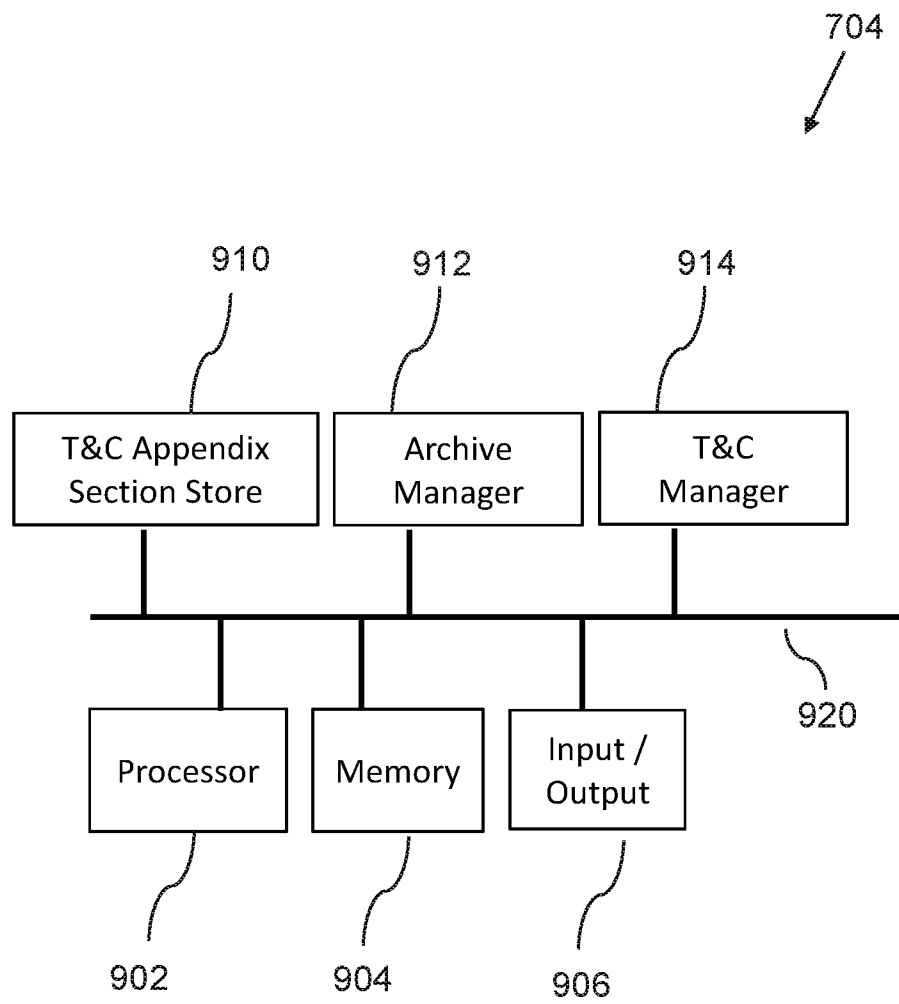


FIG. 9

Term & Conditions Server



INTERNATIONAL SEARCH REPORT

International application No.

PCT/US 17/45773

A. CLASSIFICATION OF SUBJECT MATTER

IPC(8) - G06Q 10/10 (2017.01)

CPC - G06Q 10/067, G06Q 50/00, G06Q 10/10, G06Q 10/06, G06Q 50/188, G06Q 50/18

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

See Search History Document

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

See Search History Document

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

See Search History Document

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
Y	US 2009/0216545 A1 (Rajkumar et al.) 27 August 2009 (27.08.2009) entire document especially Abstract, para [0016], para [0020]-[0023], para [0025], para [0035]-[0038]	1-20
Y	US 2016/0171634 A1 (Laine et al.) 16 June 2016 (16.06.2016) entire document especially Abstract, para [0071]-[0075], para [0082]-[0085]	1-20
A	US 2009/0234662 A1 (Stieber et al.) 17 September 2009 (17.09.2009) entire document	1-20
A	US 2007/0124234 A1 (Finley et al.) 31 May 2007 (31.05.2007) entire document	1-20

☐ Further documents are listed in the continuation of Box C.☐ See patent family annex.

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"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"&" document member of the same patent family

Date of the actual completion of the international search

29 September 2017

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Name and mailing address of the ISA/US

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