Contract Intelligence & Register

SKU CAI-L4-CI-001 · Microsoft Copilot Studio managed solution CAIContractIntelligence · Release 1.0.2.0 — controlled test baseline, not yet released for sale

01 — What it does

Extracts the key terms of each contract with a source quote and page reference, routes every extraction to a named reviewer, and keeps a register of approved terms. Amendments are applied to compute the effective terms, and renewal and notice deadlines are answered from approved data only. Contract summarisation is one feature of the product, not the product.

Capability	How it works in release 1.0.2.0
Cited extraction	29 fields per document (parties, term, renewal and notice, fees, payment, liability cap and exclusions, indemnities, IP, confidentiality, data protection, governing law, precedence, unusual clauses, open questions…). Each value carries a quote, a location and a status (found, not found, ambiguous, conflict resolved).
Human review in Teams	A review card goes to the named reviewer. Approve, reject or correct; a correction always records the review as “Needs correction” and keeps the original value and evidence beside the corrected one. Stale or superseded review cards are rejected server-side.
Register and effective terms	Masters and amendments are linked; effective terms are recomputed on approval, on content change and daily. Records whose correction is unresolved are never used.
Deadline and term queries	A Copilot Studio agent answers from two deterministic tools (effective terms; notice deadlines over a horizon), stating the as-of date and business time zone and citing the source document.
Execution warnings	Documents that are not fully signed are flagged on the card, in the register and in answers; approval of an extraction never means the agreement is in force.

02 — Human accountability (why L4)

- The agent extracts and computes; a named reviewer approves every record before it is used.
- Lawyers own interpretation and advice. The product does not give legal advice and does not act on contracts.
- Every decision, correction and resolution is logged with reviewer identity and timestamp.

03 — Prerequisites and costs

Item	Requirement
Microsoft environment	Power Platform environment with Dataverse (≈1 GB free database capacity), Microsoft 365 with Teams and SharePoint.
Copilot Studio capacity	Mandatory. The flows are Copilot Studio agent flows and need prepaid Copilot Credits or a pay-as-you-go billing plan. Without capacity no flow runs.
Microsoft costs	Microsoft consumption charges are separate from the ColleagueAI licence and are billed by Microsoft. A measured cost per contract will be published with the release; it is not yet available.
Connections	Microsoft Dataverse, SharePoint and Microsoft Teams (three connection references).
Supported documents	Text-based PDF contracts in English. Scanned (image-only) PDFs are out of scope.

04 — Known limitations of this release

- Per-user data isolation is not yet verified (release blocker T7). The agent tools currently run on the installer’s connection, so every user of the agent can query every contract. Do not share the agent beyond the contract team until this is resolved.

– Managed import can publish the agent automatically; the installation guide makes a post-import access check mandatory.
– A content change and its version stamp are separated by a few seconds (asynchronous processing).
– The daily recompute runs at 05:30 Central Europe time; other time zones need a schedule change.

05 — Not included in release 1.0.2.0 (roadmap)

These are planned and are not part of what is sold with this release:

– One-page contract summary document saved to SharePoint.
– Playbook deviation checks with severity.
– Renewal notifications to contract owners (only administrator failure alerts exist today).
– Batch import with recovery reporting.
– Czech and German output.
– A separate Microsoft 365 Copilot package (the release is a Copilot Studio managed solution).

06 — Data handling

Contract documents and extracted data stay in the customer’s Microsoft tenant (SharePoint and Dataverse). Generative AI processing uses Microsoft services under the customer’s Microsoft agreements; depending on environment settings (“Move data across regions”), prompts may be processed outside the environment’s region. ColleagueAI processes only separate governance-layer metadata as described in the Trust Center. Customers should assess whether a DPIA is required for their contract data.

This dossier describes release 1.0.2.0 as tested on 4 November 2026. CAI L4 is ColleagueAI’s internal governance classification, not an EU AI Act risk category. Confidential · for evaluation.