Top-tier Contracts

on Contract Management Hub

App Guide

(v 1.0.106)

Top-tier Contracts application is designed to streamline and enhance the entire lifecycle of contract management. Built on Microsoft Power Platform, it centralizes contract-related activities (drafting, considering, approving, track contract dates, terminating), making them easily accessible and secure. Featured Approvals capabilities allow Contract Managers to submit requests, which can then be processed (approve/reject/send to revision) by a Legal department specialist.

Application type: Model-driven Power App (Dynamics 365 custom App)

Data platform: Microsoft Dataverse

Technologies used: Microsoft Power Platform, Microsoft Dataverse, PowerFX, JavaScript.

Roles in Solution: Sales manager, Legal department specialist, Signatory, Administrator.

Audience.

Contract Managers. Professionals responsible for overseeing the contract lifecycle, ensuring compliance, and managing contract-related risks.

Legal Teams. Lawyers and legal advisors who draft, review, and negotiate contract terms.

Procurement Officers. Individuals involved in sourcing and managing supplier contracts.

Sales Teams. Sales professionals who handle customer contracts and agreements.

Finance Departments. Teams that manage financial aspects of contracts, including contracts' terms and accounts' banking information.

Executives and Decision Makers. Senior management who approve and oversee high-value contracts and strategic agreements.

Table of Contents

Key Features

- **Centralized contracts repository**. Utilizes Microsoft Dataverse for a cloud-based, easily accessible, and robustly protected data solution. Functions include creating and drafting various contract types, storing, and managing contract records.
- **Contract types pre-defined**. Sales contract, NDA, Rental contract, Independent Contractor Agreement, Free Use Agreement, Employee contract, Debt Transfer Agreement. Each type has own template.
- **Contracts** enhanced configuration, including different types of Contract dates, related billing features.
- **Approval workflows**. A tunable custom approval workflows for both single-step and two-step (sequential and parallel) scenarios, with each contract revision history meticulously stored.
- **Automated workflows**. Includes automated notifications on approvals statuses via PowerApps, Outlook, and Microsoft Teams based on contract-related dates to ensure timely actions.
- **Accounts management**. Updated and customizable configurations for managing accounts, including storing banking information and related requisites, along with signatory role functionalities.
- **Real-time collaboration**. Enable multiple stakeholders to work on contracts simultaneously, ensuring seamless communication and updates.
- **Featured analytics**. Insights into contracts status, dates, performance, compliance, as well as on approvals processes and stages.
- **Compliance management**: Ensure all contracts adhere to regulatory requirements and organizational policies.
- **Integration capabilities**. Seamlessly integrates with other enterprise systems to create a unified contract management ecosystem.

Installation and Setup

An appropriate administrative role is required for the initial deployment. This particular role should be defined within the organization's case, whether it is a Global Administrator, Application Administrator, or another role that allows for such deployment within the tenant of the Customer.

Top-tier Contracts is Model-driven PowerApps application. It built within Power Apps Contract Management Hub solution. Therefore, it requires proper licensing of the Power Platform to deploy it. Make sure you have the licenses required to install the solution and run the application, otherwise the installation may fail.

Top-tier Contracts uses a service Microsoft365 account to provide notifications via Teams and Outlook. Based on user experience feedback, we recommend creating a service M365 account with proper licensing of Power Platform, and name it as: **Contract Management Hub.**

However, the solution can also be deployed and installed by an authorized administrator on behalf of their M365 account.

After Top-tier Contracts installation, you need to configure application users. Basically, user management is built on Power Platform Environment users and teams. Initially, all of the Environment users added to business unit team without assigned roles. In order to provide Top-tier Contracts you need to assign appropriate roles to Users in [Power Platform Admin Center](#)

List of Security roles correspond to their functionality:

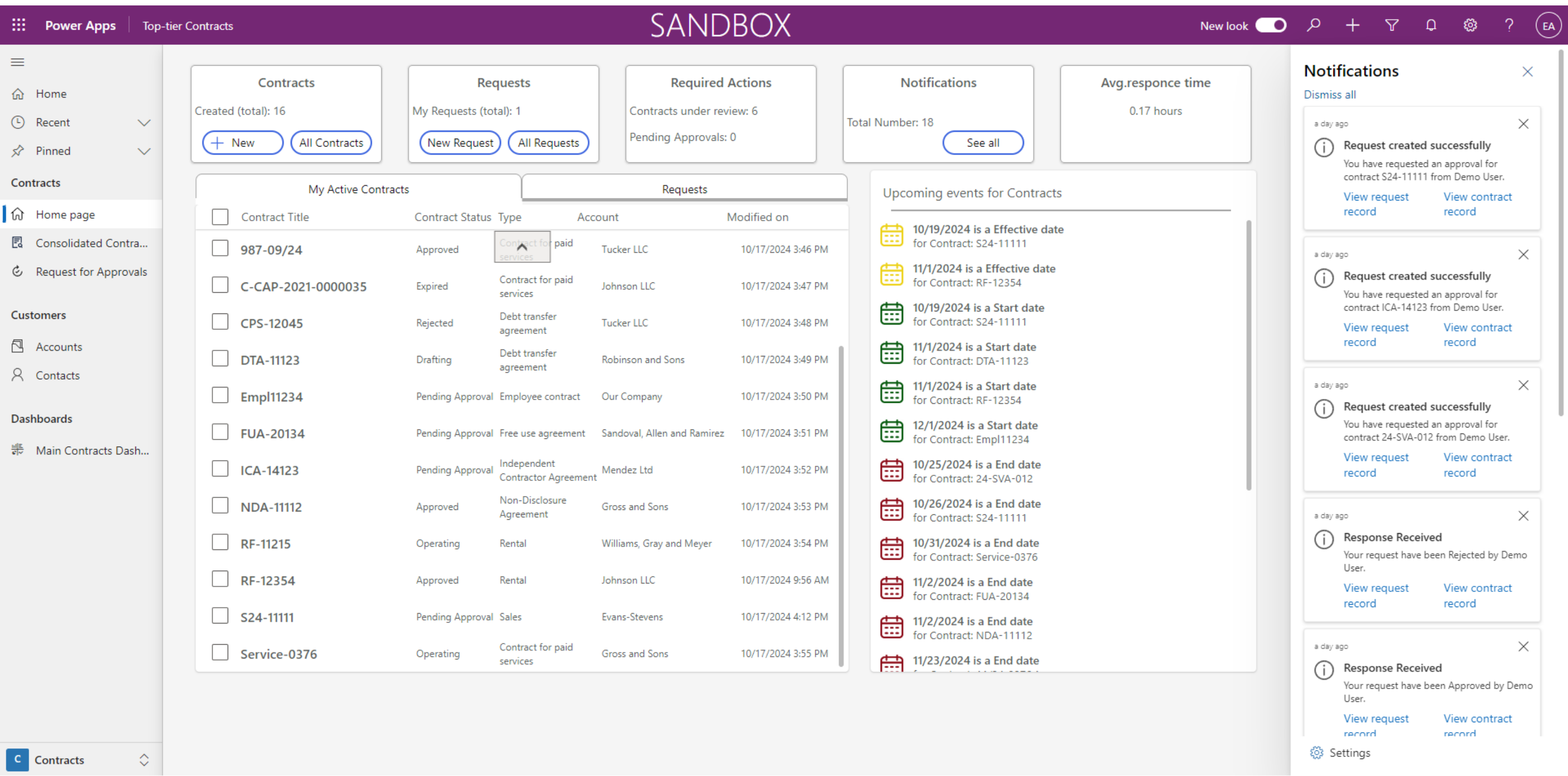
Contracts Management Hub > **Security roles**

Display name ↑	Name
Administrator Top-tier Contracts	Administrator Top-tier Contracts
Legal dept Top-tier Contracts	Legal dept Top-tier Contracts
Sales Top-tier Contracts	Sales Top-tier Contracts
Signatory Top-tier Contracts	Signatory Top-tier Contracts

Pay attention that Power Automate Cloud flow that provides notifications (named **Notifications on Request** is turned off after initial deployment and/or installation. You need to turn it on manually in order to run all of the notifications.

App Homepage

The homepage of the **Top-tier Contracts** application is designed to provide you with a streamlined and intuitive user experience. It consists of two main tabs: **My Active Contracts** and **Requests**.



My Active Contracts

The tab is your personal dashboard for managing all your contracts:

- View and Access Contracts.
- Track Contract statuses, including drafts, approvals, and operations.
- Manage Contract details
- Search and Filter.

Requests

The tab is dedicated to handling all contract-related approval requests:

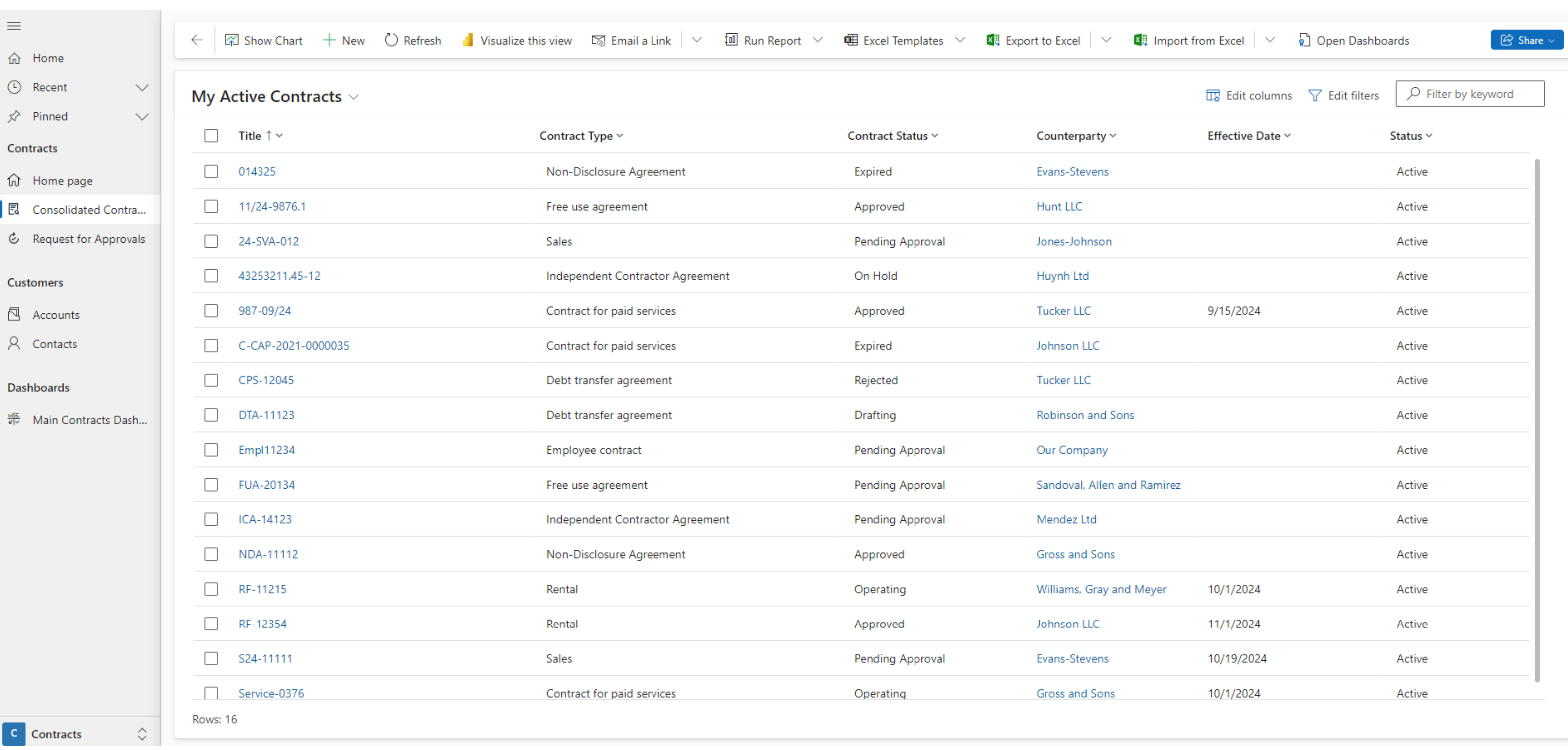
- Track all Requests related to your role with Views of My Requests, Incoming Requests (for approvers roles), Outgoing Requests (for Requests in approval process stages)
- View Approval requests details.
- Process approve, reject or revision of the Contract (for Legal department role).
- Collaborate on Approval requests.

Consolidated Contracts repository

The centralized Contracts Repository is a central component of the solution, developed on Microsoft Dataverse to provide secure storage and efficient management for all contract types processed within it. The **Consolidated Contract** entity supports the entire lifecycle of various contract types, including creation, drafting, approving, reviewing, store, and manage.

The centralized storage and management capabilities of Microsoft Dataverse streamline contract processes, reducing administrative overhead and enhancing operational efficiency. Key features:

- **Unified storage architecture.** Contract records of all types are stored within a single, centralized repository built on Microsoft Dataverse. This architecture ensures seamless access and management of contract data across the organization.
- **Comprehensive contract lifecycle management.**
- **Enhanced configuration capabilities.**
- **Streamline contract approval processes** with customizable workflows.
- **Real-time collaboration** with multiple stakeholders.
- **Analytics and compliance monitoring** to gain insights into Contract status, performance, compliance, and approval processes.
- **Robust security and accessibility.**



Title	Contract Type	Contract Status	Counterparty	Effective Date	Status
014325	Non-Disclosure Agreement	Expired	Evans-Stevens		Active
11/24-9876.1	Free use agreement	Approved	Hunt LLC		Active
24-SVA-012	Sales	Pending Approval	Jones-Johnson		Active
43253211.45-12	Independent Contractor Agreement	On Hold	Huynh Ltd		Active
987-09/24	Contract for paid services	Approved	Tucker LLC	9/15/2024	Active
C-CAP-2021-0000035	Contract for paid services	Expired	Johnson LLC		Active
CPS-12045	Debt transfer agreement	Rejected	Tucker LLC		Active
DTA-11123	Debt transfer agreement	Drafting	Robinson and Sons		Active
Empl11234	Employee contract	Pending Approval	Our Company		Active
FUA-20134	Free use agreement	Pending Approval	Sandoval, Allen and Ramirez		Active
ICA-14123	Independent Contractor Agreement	Pending Approval	Mendez Ltd		Active
NDA-11112	Non-Disclosure Agreement	Approved	Gross and Sons		Active
RF-11215	Rental	Operating	Williams, Gray and Meyer	10/1/2024	Active
RF-12354	Rental	Approved	Johnson LLC	11/1/2024	Active
S24-11111	Sales	Pending Approval	Evans-Stevens	10/19/2024	Active
Service-0376	Contract for paid services	Operating	Gross and Sons	10/1/2024	Active

Pre-defined Contract types

The Top-tier Contracts application offers a comprehensive suite of pre-defined contract types, each tailored to meet specific business needs. These contract types are designed to streamline the contract creation process, ensuring consistency and compliance across all agreements. Each contract type has its own set of features, including unique fields to store contract text paragraphs and other pertinent information:

1. **Sales Contract** is to facilitate the sale and/or purchase of goods or services, includes fields for product reference, pricing, delivery terms, and payment conditions.

2. **Contract for Paid Services** governs the provision of paid services between two parties, contains sections for service descriptions, payment terms, service duration, and performance standards.

3. **Non-Disclosure Agreement (NDA)** to protects confidential information shared between parties, includes clauses for confidentiality obligations, exclusions, and the duration of the agreement.

4. **Rental Contract** outlines the terms for renting property or equipment, covers rental terms, payment schedules, maintenance responsibilities, and termination conditions.

5. **Independent Contractor Agreement** defines the relationship between a company and an independent contractor, could include scope, payment terms, intellectual property rights, and confidentiality clauses.

6. **Free Use Agreement** allows one party to use another party's property without charge, details the terms of use, responsibilities of the user, and liability clauses.

7. **Employee Contract** establishes the terms of employment between an employer and an employee, could contain sections for job responsibilities, compensation, benefits, and termination conditions.

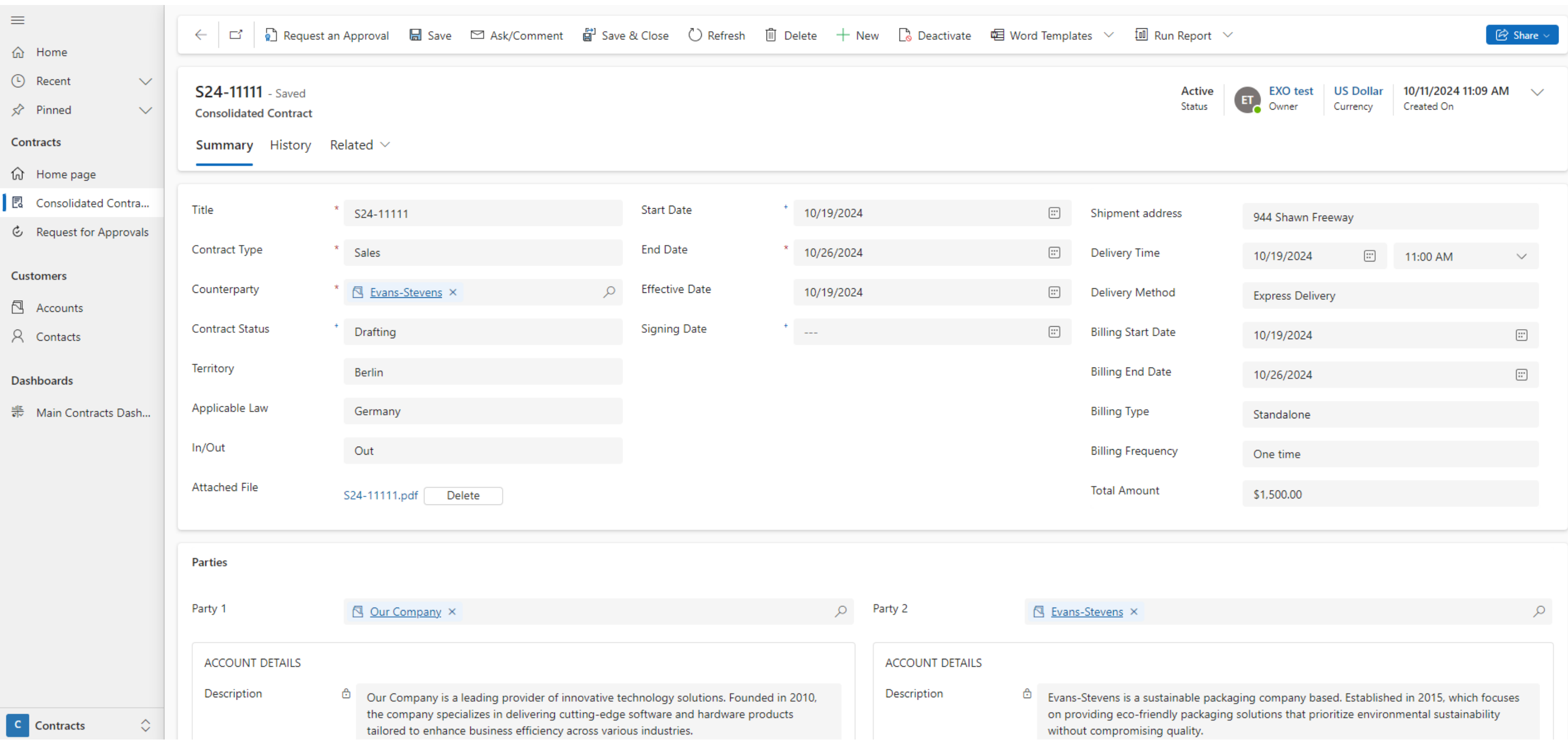
8. **Debt Transfer Agreement** facilitates the transfer of debt obligations from one party to another, has unique three-party structure, including original debtor, new debtor, and creditor details, along with transfer terms and conditions.

All contract types, listed above, are designed for two parties, except the Debt Transfer Agreement. The Debt Transfer Agreement is uniquely structured to involve three parties, ensuring clarity and legal compliance in debt transfer scenarios.

Approval requests settings could be implemented for each contract type independently.

Enhanced Contract configuration

Tailor each contract to specific needs with a comprehensive set of configuration options. This ensures that every critical aspect of your contracts is meticulously managed and customized to perfection.



Configuration options include:

- **Applicable Law** choice to specify the legal jurisdiction that governs the contract, ensuring compliance with relevant laws and regulations.
- **Contract Status** to track the current status of the contract, such as draft, pending approval, active, on hold, or terminated.
- **Counterparty** - reference the counterparty Account involved, linking to their account details for easy access and management.
- **Contract direction** indicate whether the contract is incoming (received from another party) or outgoing (sent to another party).
- **Relevant document attached** for record-keeping and easy reference.
- **Bank Details** and **Signatory** references to Accounts involved, ensuring all financial and authorization details are readily available.
- **Enhanced dates configuration** to manage all essential contract dates with precision.

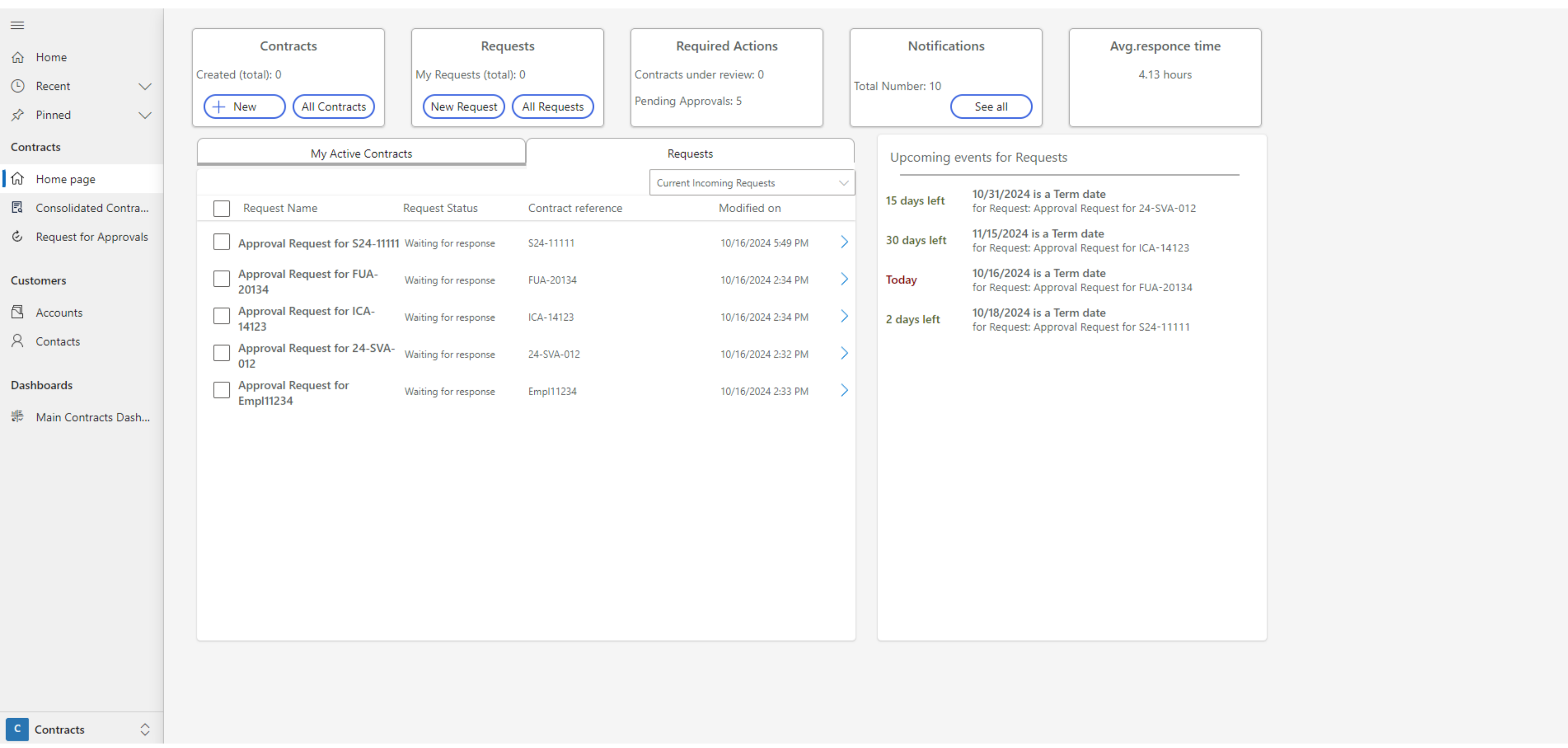
Approval workflows

Top-tier Contracts application uses a custom feature designed and developed Approval workflows to streamline the approval process and ensure efficiency and accountability at every step.

These workflows empower users, such as those in sales roles, to initiate contract approvals seamlessly.

From other side of contract approval business process specialists in Legal departments can receive these requests, review the contract details, and take appropriate actions. Approvers have the flexibility to approve, reject, comment on, or revise contracts, accommodating both single-step and two-step (sequential and parallel) approval flows.

These workflows are managed through standardized settings tailored to different contract types, ensuring consistency and adherence to organizational policies. Additionally, the system automatically updates contract statuses based on approval actions and maintains a detailed revision history, providing a clear record of all changes and updates.



Approval workflows

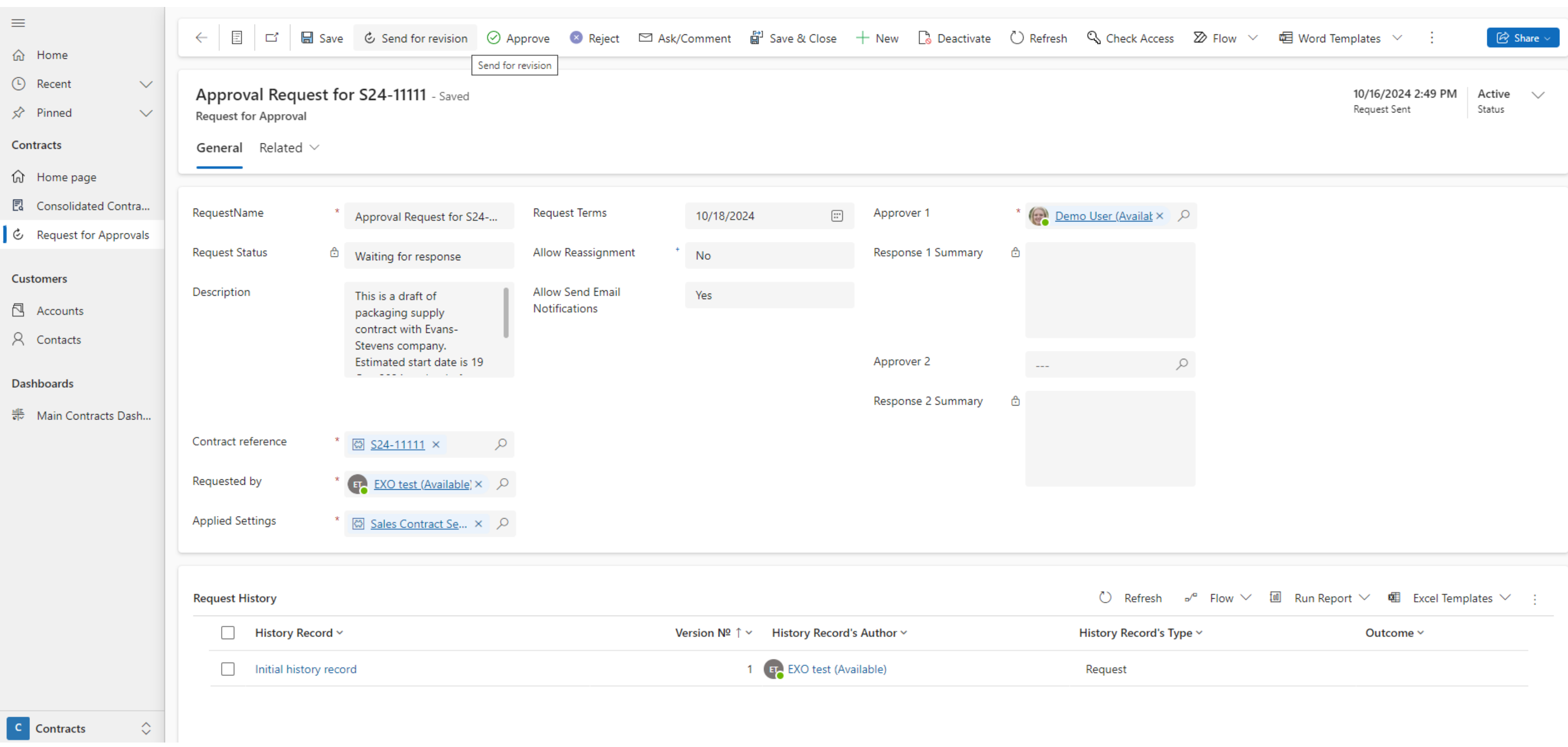
Key Features.

- **Initiating Approval Requests**

Users, such as those in sales roles, can easily send contracts for approval. This initiates the workflow, prompting the relevant approvers to take action.

- **Receiving and Reviewing Requests**

Specialists, such as those in the Legal department, receive approval requests. They can review the contract details, ensuring all necessary information is included and accurate.



- **Approval Actions**
  - ➢ Approve: Confirm the contract is ready to proceed.
  - ➢ Reject: Decline the contract, providing reasons for the rejection.
  - ➢ Comment: Add comments or feedback for further revisions.
  - ➢ Revise: Make necessary changes to the contract during the approval process.

- **Approvals types**

The solution supports both single-step and two-step approval workflows.

- ➢ **Single-step**. A straightforward approval process where one approver reviews and decides on the contract.
- ➢ **Two-step**. A more complex process that can be either sequential (one approver after another) or parallel (two approvers simultaneously).

Automated workflows

The automated workflows in the Top-tier Contracts application leverage the robust capabilities of Microsoft Power Automate to the contract management processes. These workflows are integral to the Approval Request process, automating critical tasks and notifications to ensure efficiency and accuracy. By utilizing Power Automate, the system seamlessly integrates various actions and triggers, reducing manual intervention and enabling a more efficient workflow.

Key Features

- **Notifications on Approval Requests**

Automated notifications keep all stakeholders informed about the status of approval requests. Notifications are triggered for various actions, including:

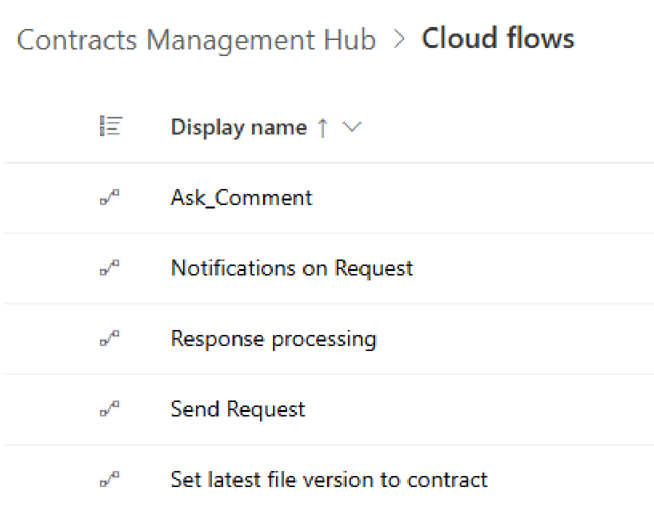
  - Created: When a new approval request is initiated.
  - Approved: When a request is approved.
  - Rejected: When a request is rejected.
  - Sent to Revision: When a request is sent back for revisions.

- **Ask for a Comment** process

The solution includes a business process to Ask for a comment, allowing users to request feedback or additional input on a contract Approval request. This process ensures that all necessary comments are gathered before finalizing the contract.

- **File version management**

The flow automatically sets the latest version of the file to the contract record being processed. Additionally, it maintains an updated history of all files processed during the approval process, ensuring that every change is tracked and documented. This ensures that the most up-to-date document is always available, reducing the risk of errors and inconsistencies.

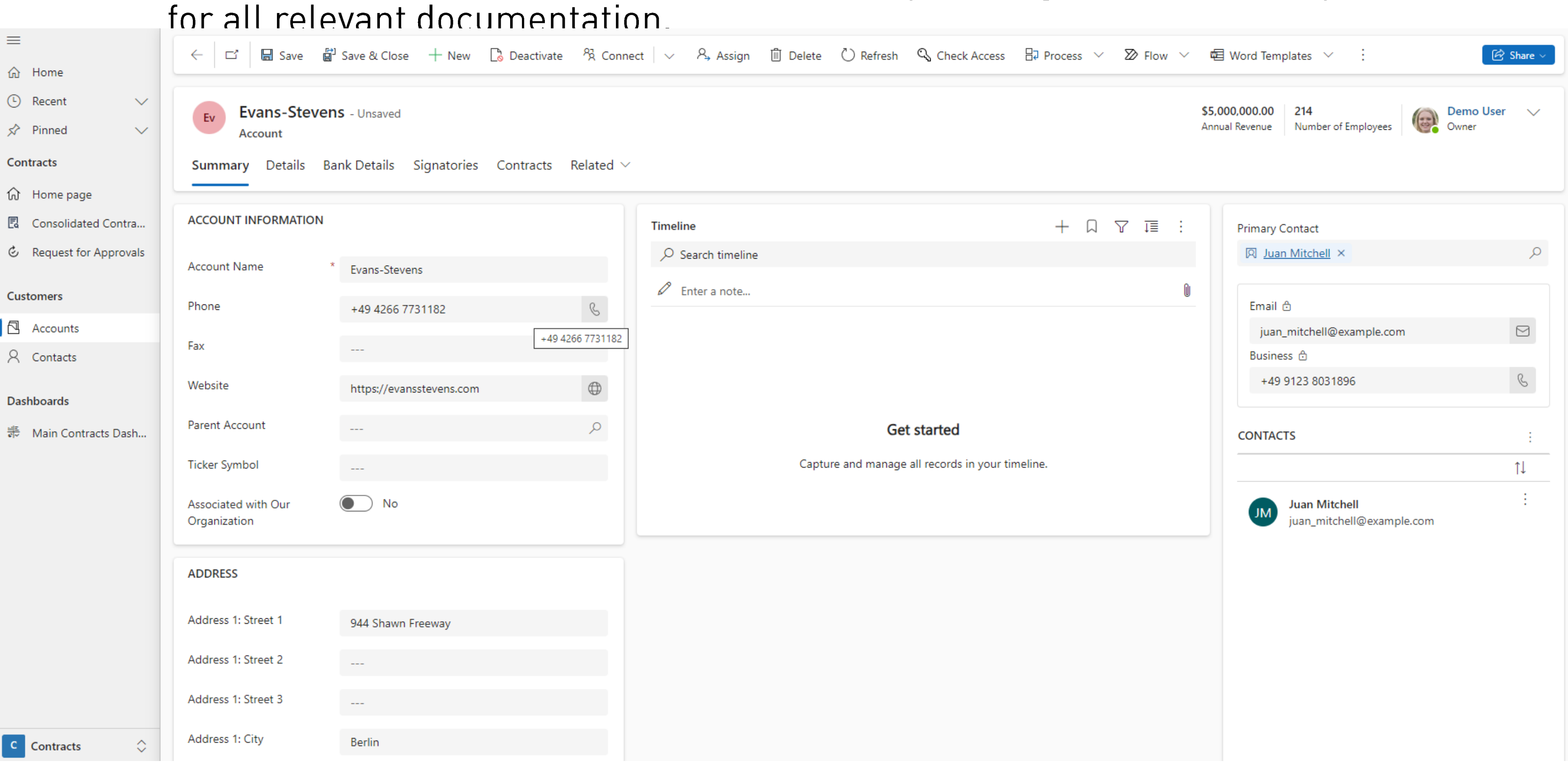


Accounts management

Contract Management Hub solution is built on the robust foundation of the Common Data Model (CDM) within Microsoft Dataverse. This ensures a standardized and scalable approach to managing account-related data, while also incorporating advanced customizations to meet specific contract processing needs.

The core account functionality provides essential features:

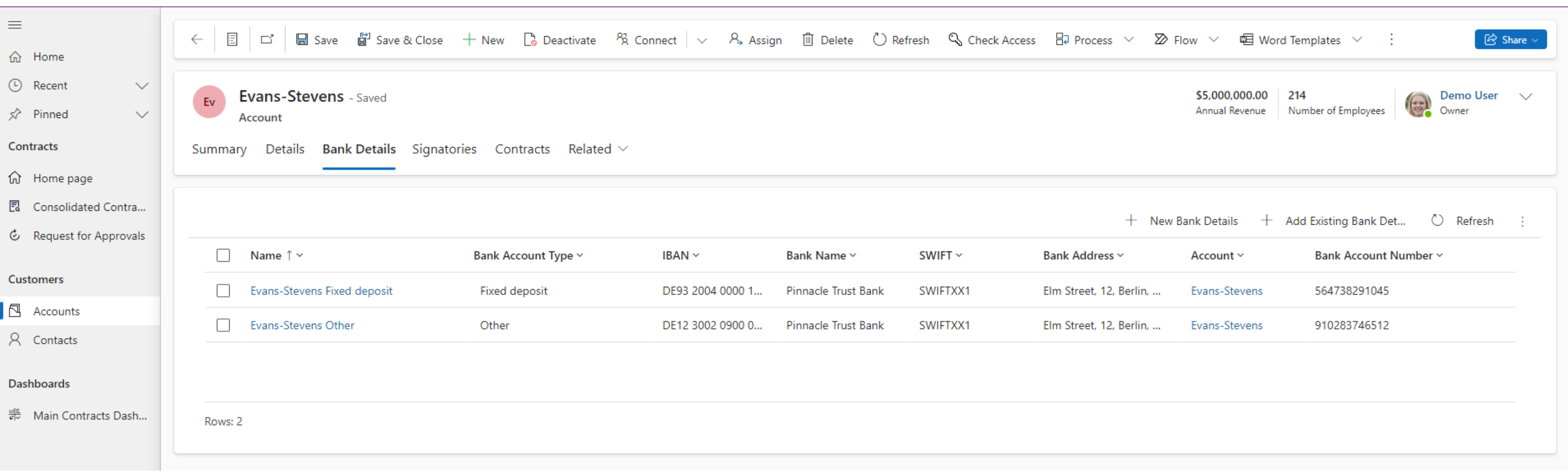
- **Account Information** to store and manage basic account details, including names, addresses, contact information, and industry classifications.
- **Relationships** to define and manage relationships between accounts, such as parent-child hierarchies and connections to other entities like contacts and opportunities.
- **Activity Tracking** to track activities related to accounts, including emails, phone calls, meetings, and tasks, ensuring a comprehensive view of all interactions.
- **Notes and Attachments** to account records, providing a centralized repository for all relevant documentation.

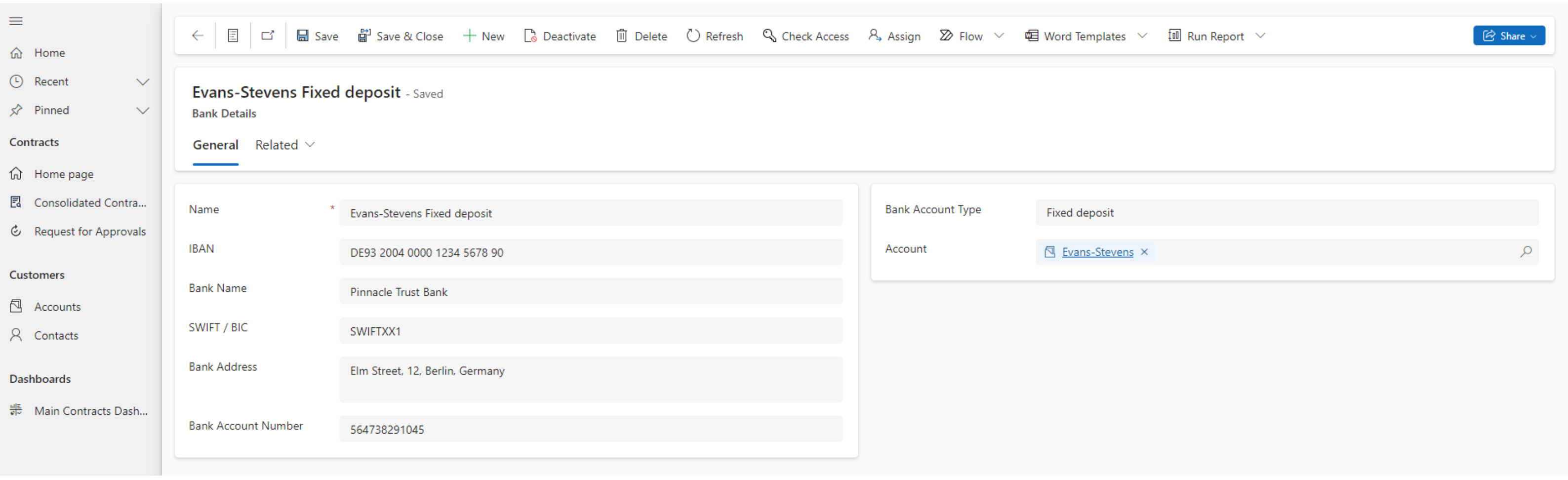


Accounts management

Advanced Customizations to enhance account management, specifically tailored for contract processing:

- **Bank Details Management.** Store and manage detailed banking information for each account, including bank names, account numbers, SWIFT codes, and other relevant financial details.
- **Account Signatories.** Maintain records of authorized signatories for each account, including their roles, contact information.
- **Contract-Specific Details.** Capture and manage additional details valuable during contract processing, such as preferred payment terms, credit limits, and historical contract performance.
- **Integration with Contracts.** Seamlessly link account records to contract records, ensuring that all relevant account information is readily accessible during contract creation, approval, and management processes.

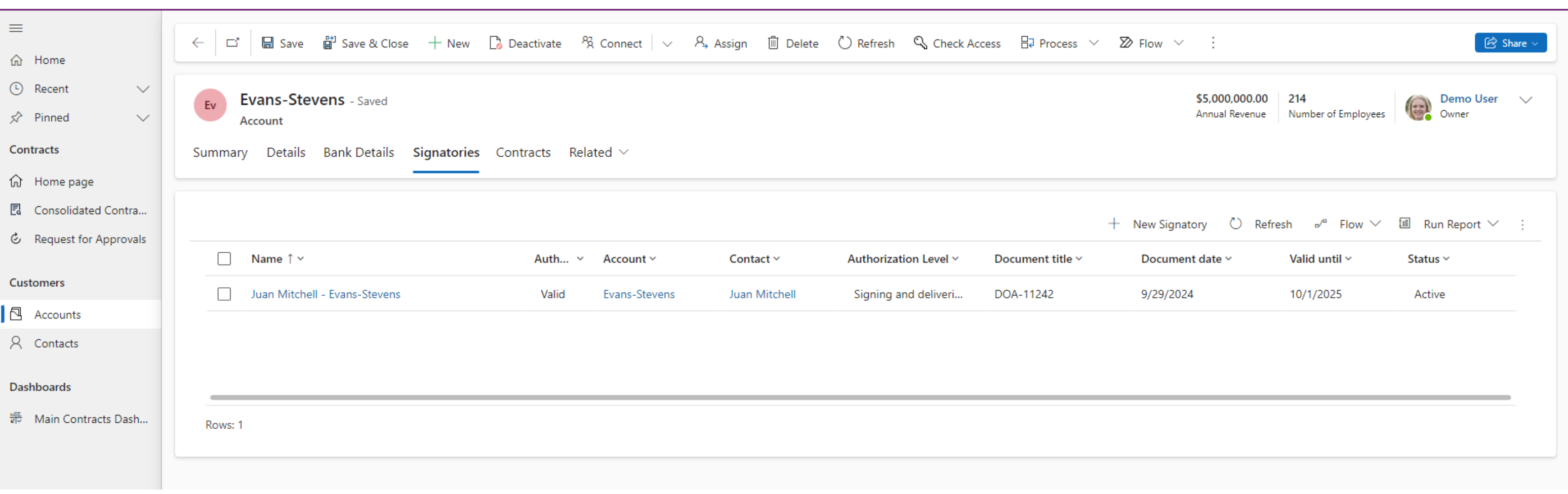




Contacts management

Built on the robust Common Data Model within Microsoft Dataverse, the Contacts Management Hub provides a solution for handling all contact-related data. The core contact functionality leverages essential features:

- **Contact Information.** Store and manage detailed contact information, including names, job titles, email addresses, phone numbers, and physical addresses.
- **Relationships.** Define and manage relationships between contacts and other entities, such as accounts, opportunities, and contracts.
- **Activity Tracking.** Track activities related to contacts, including emails, phone calls, meetings, and tasks.
- **Notes and Attachments.** Attach notes and files to contact records, providing a centralized repository for all relevant documentation and correspondence.
- **Segmentation and Categorization.** Segment and categorize contacts based on various criteria, such as role, department, or relationship to the organization.



Integration with Contracts.

In addition to the core functionality, the Contacts Management Hub provides

- **Linking Contacts to Contracts.** Easily link contact records to specific contracts, ensuring that all relevant contact information is readily accessible during contract creation, approval, and management processes.
- **Signatory Role.** Manage signatory roles for contacts, including their authorization levels and digital signatures. This ensures that contracts are signed by the appropriate individuals, maintaining legal and procedural compliance.

Featured Analytics

Top-tier Contracts includes analytics, providing users with insightful dashboards to monitor and manage contract-related activities effectively. The analytics feature is divided into two main dashboards: the Main Contracts Dashboard and the Requests for Approval Dashboard.

The Main Contracts Dashboard offers a comprehensive overview of contract activities, featuring several key visualizations and metrics:

- Contracts by Type Chart. Visualize the distribution of contracts across different types, such as Sales Contracts, NDAs, Rental Contracts, and more.
- Contracts by Dates Charts. Track contracts based on various date metrics, including start dates, end dates, and effective dates.
- New Accounts Registered. Monitor the number of new accounts registered within a specific period.
- Common Contracts Stats. Access key statistics related to contracts, such as the total number of active contracts, contracts pending approval, and contracts nearing expiration.

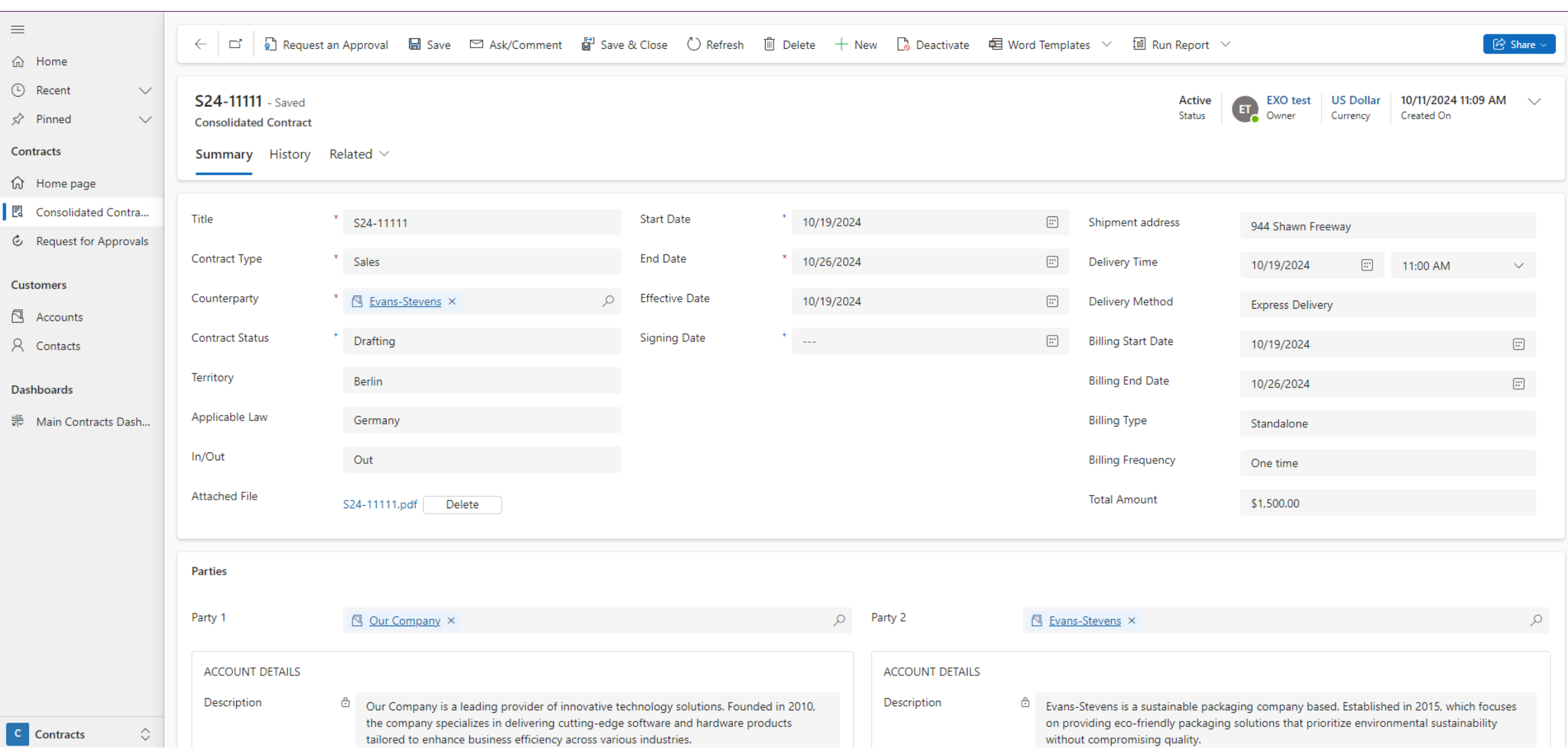
The Requests for Approval Dashboard focuses on the status and progress of approval requests, featuring the following components:

- Request Statuses. View the current status of all approval requests, categorized as pending, approved, rejected, or sent for revision.
- Ongoing Count of Requests in Process. Keep track of the number of requests currently in process.
- Table of Requests. Access a detailed table listing all approval requests, including information such as requestor, contract type, submission date, and current status.

Getting Started

1. Accessing the App.
   Log in to your Power Apps account and navigate to the **Top-tier Contracts** app. If you have the appropriate permissions in the PowerPlatform environment and the platform administrator has assigned you roles, the application will be available in the Apps (Apps -> Shared with me) section. App can also be shared and accessed by a link or a customized shortcut.

2. Creating a New Contract
   Creating a contract in the ToptierContracts application is a straightforward process. There are several ways to create a new contract
   1. from the Homepage
      - Navigate to the homepage.
      - Click on the **+New** button.
      - Fill in the required fields in the contract creation form (such as contract title, parties involved, contract type, and others).
      - Click **Save** or **Save & Close** to store the initial details.
      - Additional fields will appear in dependence of the contract type selected; fill in these fields as needed to complete the contract details.
      - Upload any relevant documents.

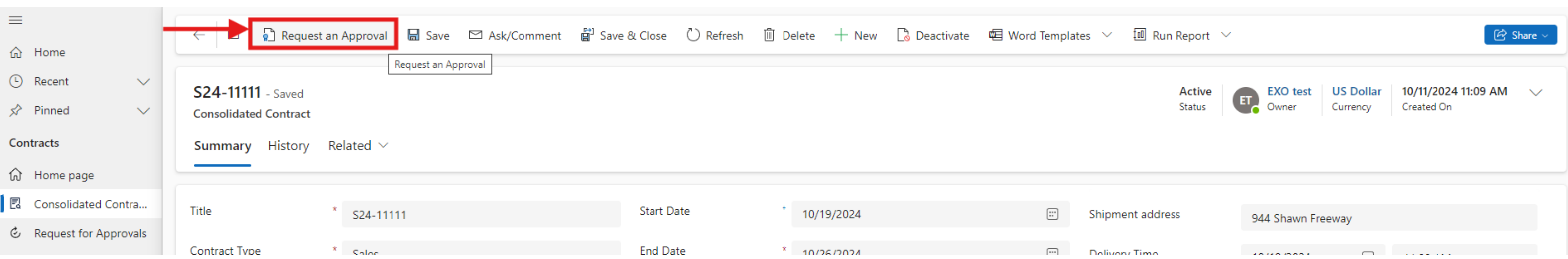


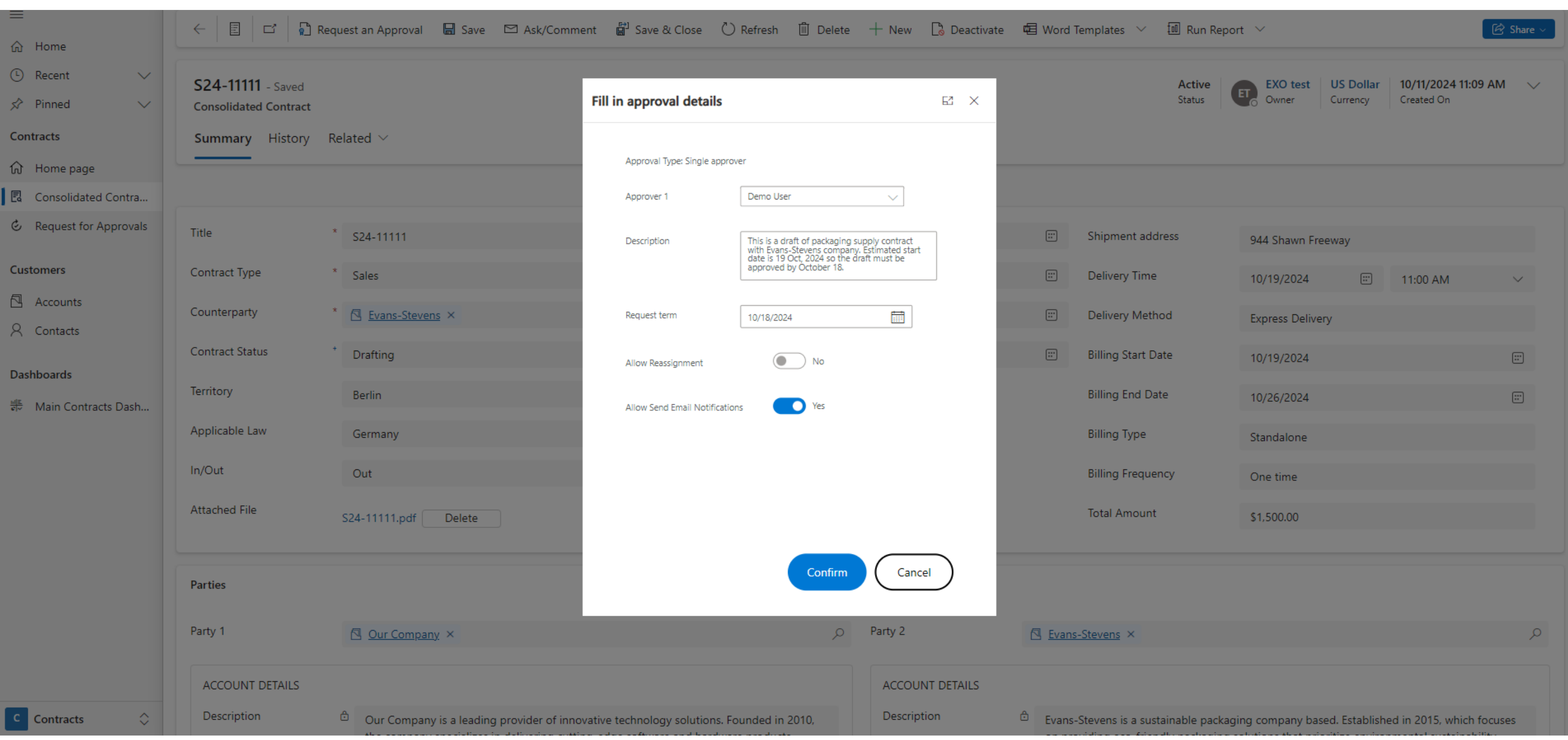
Getting Started

3. Send Request.
There are two ways to create and send a Request for approval in the Top-tier Contracts:

1. **for Contracts with status Drafting**:

- Open the contract form for the contract that is currently in drafting status.
- Click on the **Request an Approval** button.
- Fill in the required fields in the approval request form.
- Click Confirm to submit the request for approval.

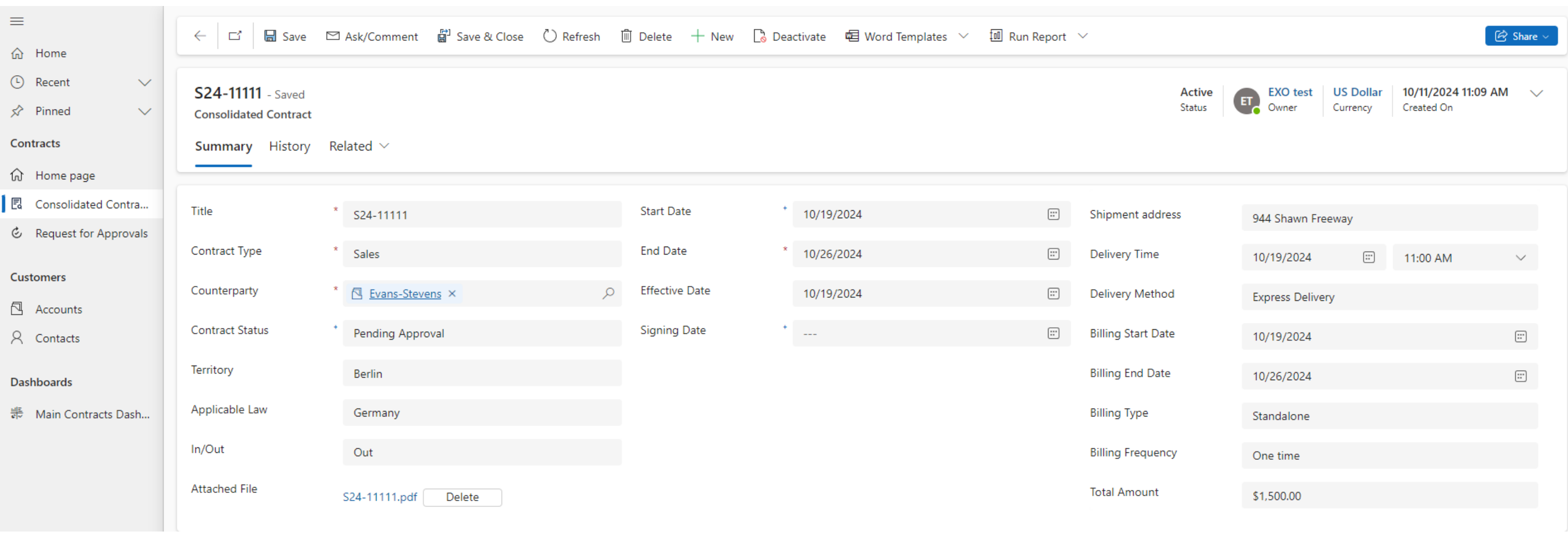




Getting Started

Once the Request is sent, the Status field of the Contract automatically updated to "Pending Approval".

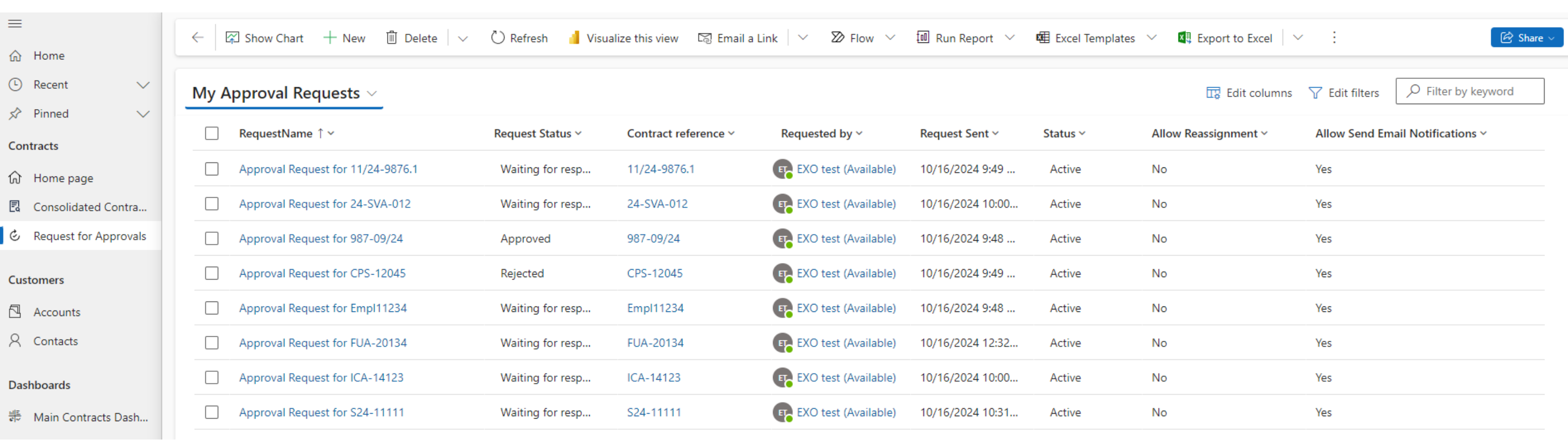
Note, that there is no ability to make a new Approval request for Contracts in "Pending Approval" status



2. Create a new Request for Approvals

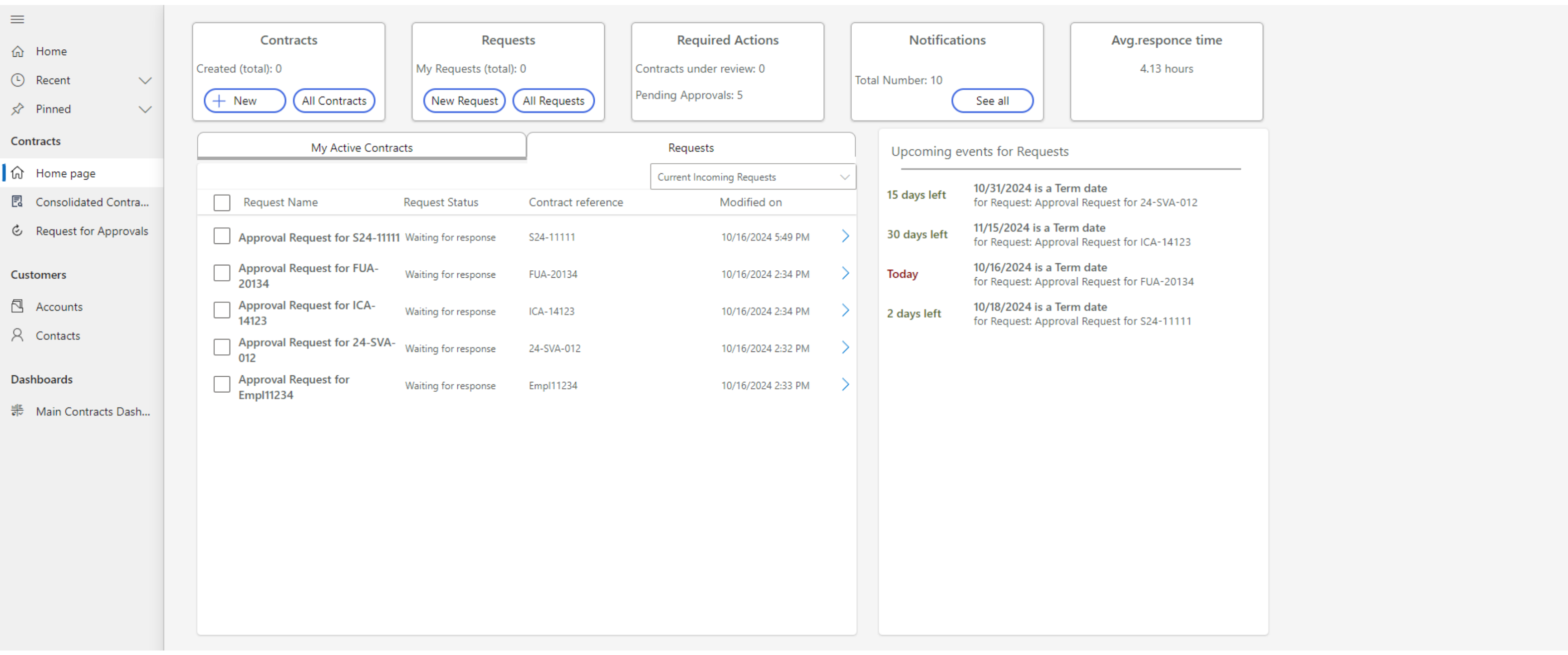
- Navigate to the Requests for Approvals section.
- Click on the **+New** button.
- Fill in the required fields in the new approval request form.
- Click **Save** or **Save & Close** to create and submit the request for approval.

All Requests made by User are displayed on "My approval requests" view:

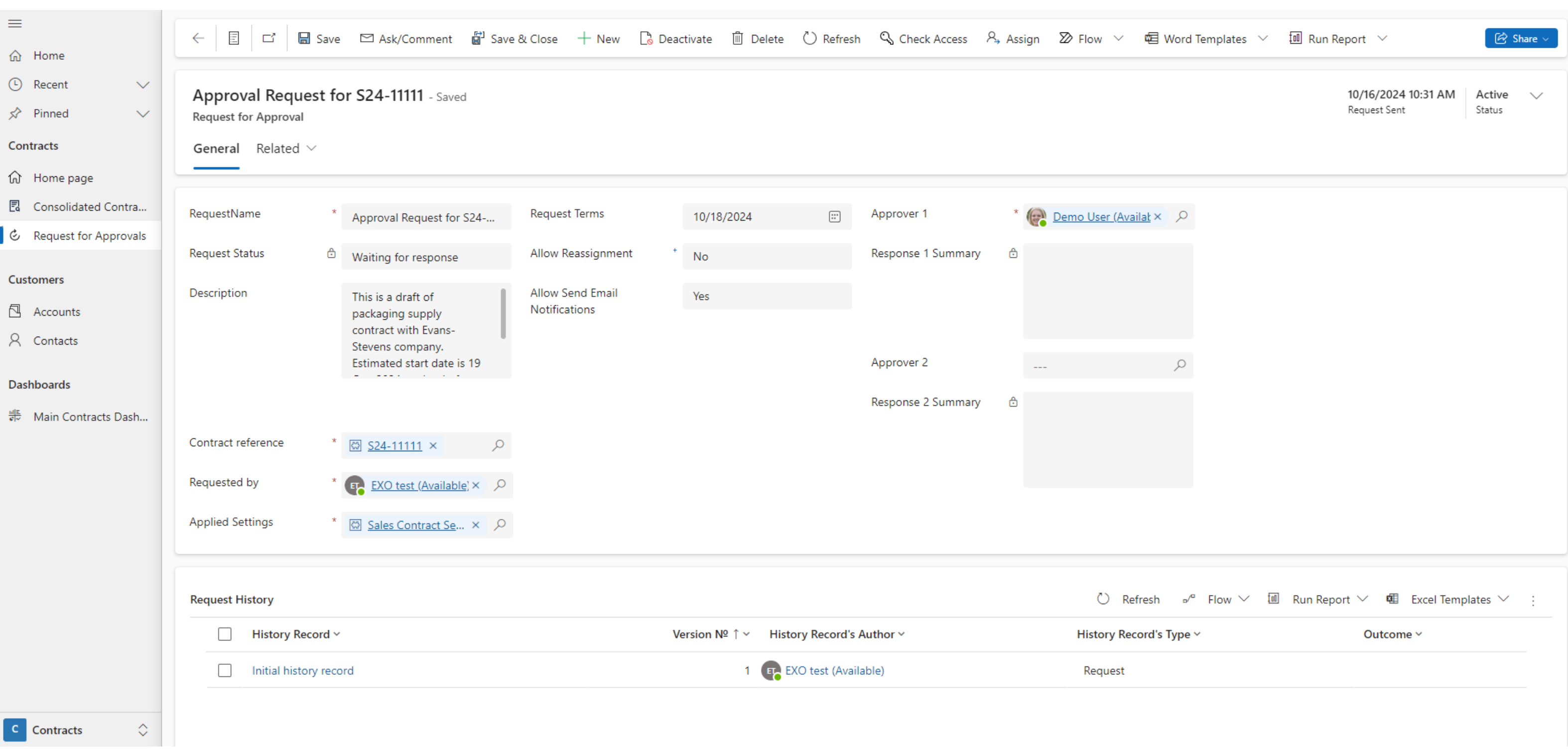


4. Processing Requests for Approvals.

All incoming approval requests are displayed on appropriate view of Requests tab of the App Homepage, or Requests for Approval section:



Requests for Approval has status displaying stage of the Request:



Getting Started

4.1 Actions on Request: Approve/Reject/Send for Revision

There are several ways to approve, reject, or send for revision.

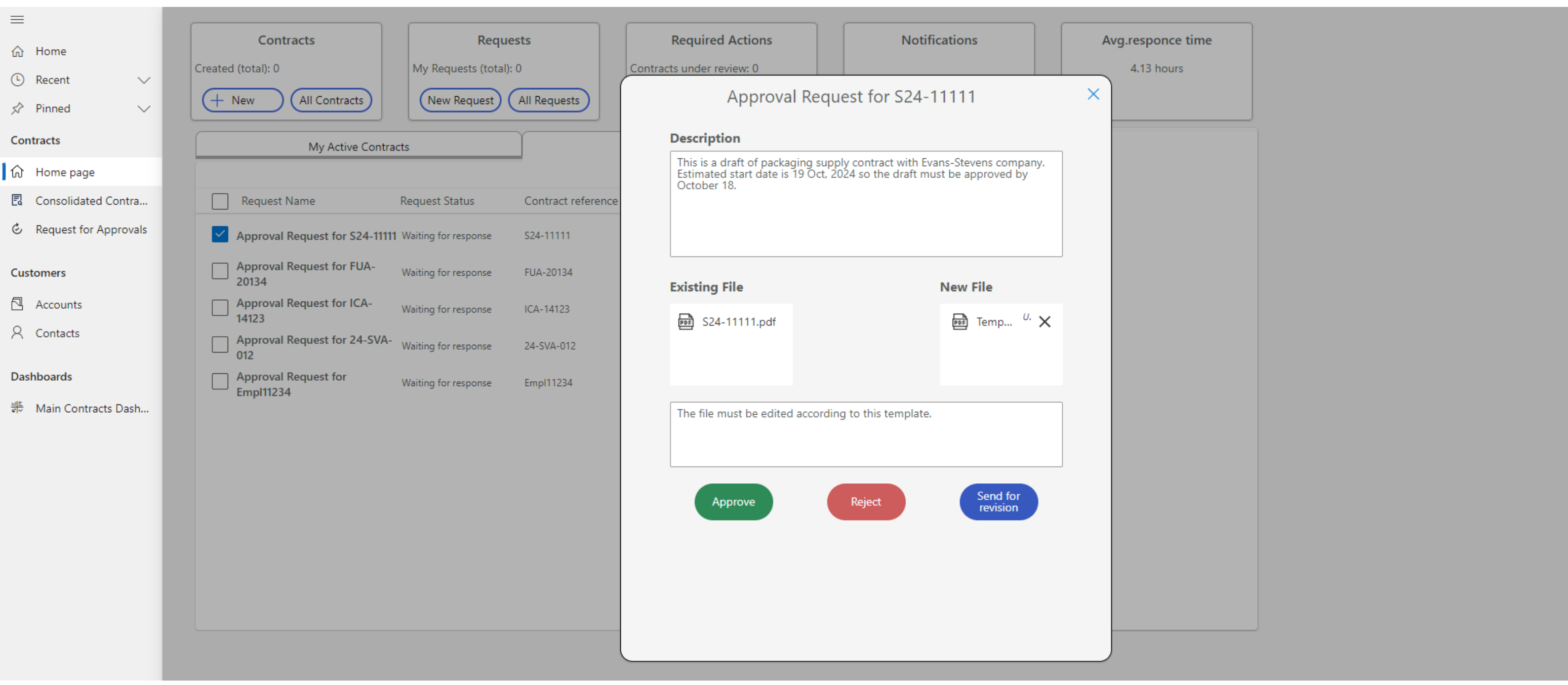
1. from the **Requests tab on Homepage**.

➢ Navigate to the homepage and locate the **Current Incoming Requests** view.

➢ Select a Request you want to act on.

➢ In the window that appears, you can add files or comments as needed.

➢ Choose the appropriate action button (Approve, Reject, or Send for Revision) to complete the process.



2. from the **Requests for Approvals screen**:

➢ Navigate to the **Requests for Approvals** section.

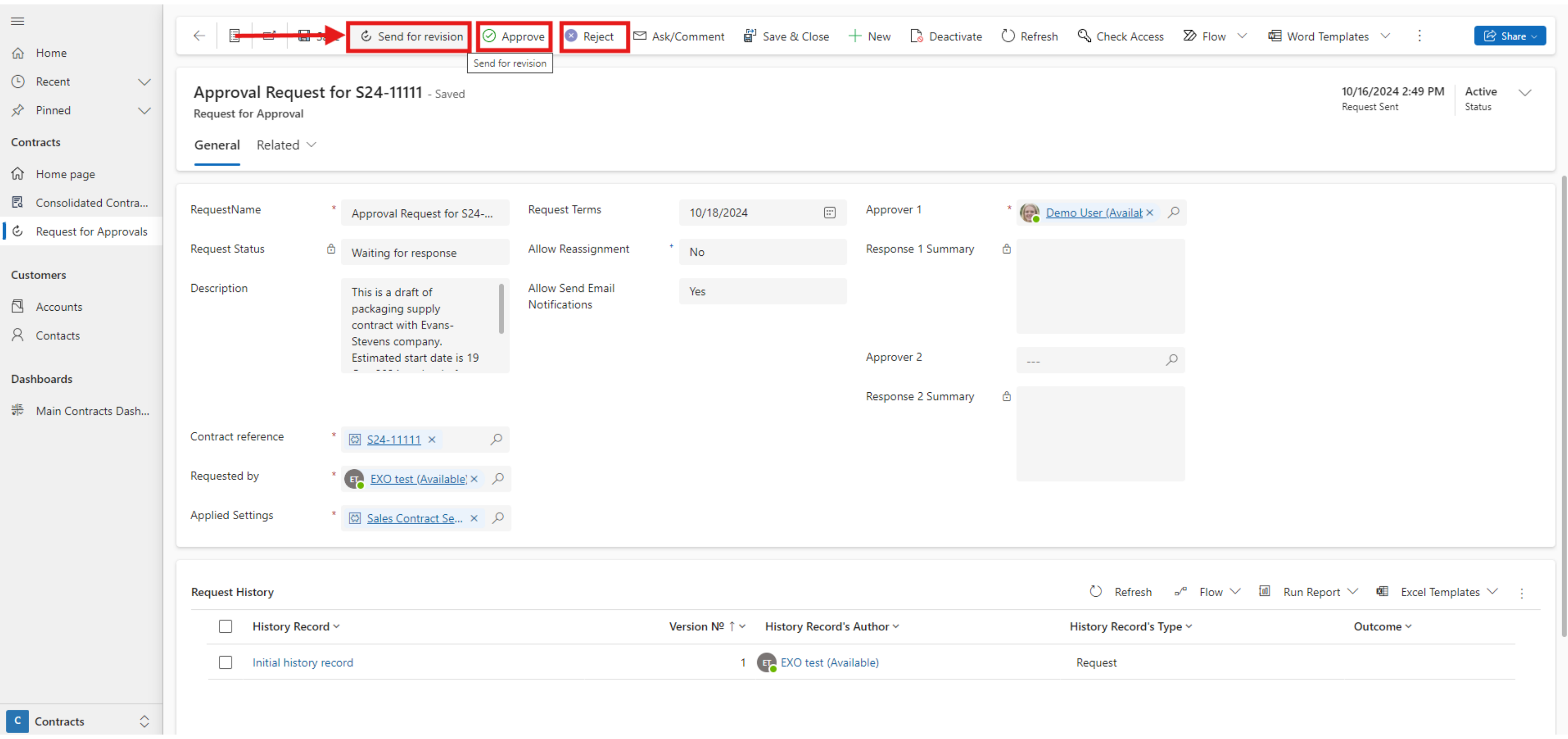
➢ Select a Request you want to act on.

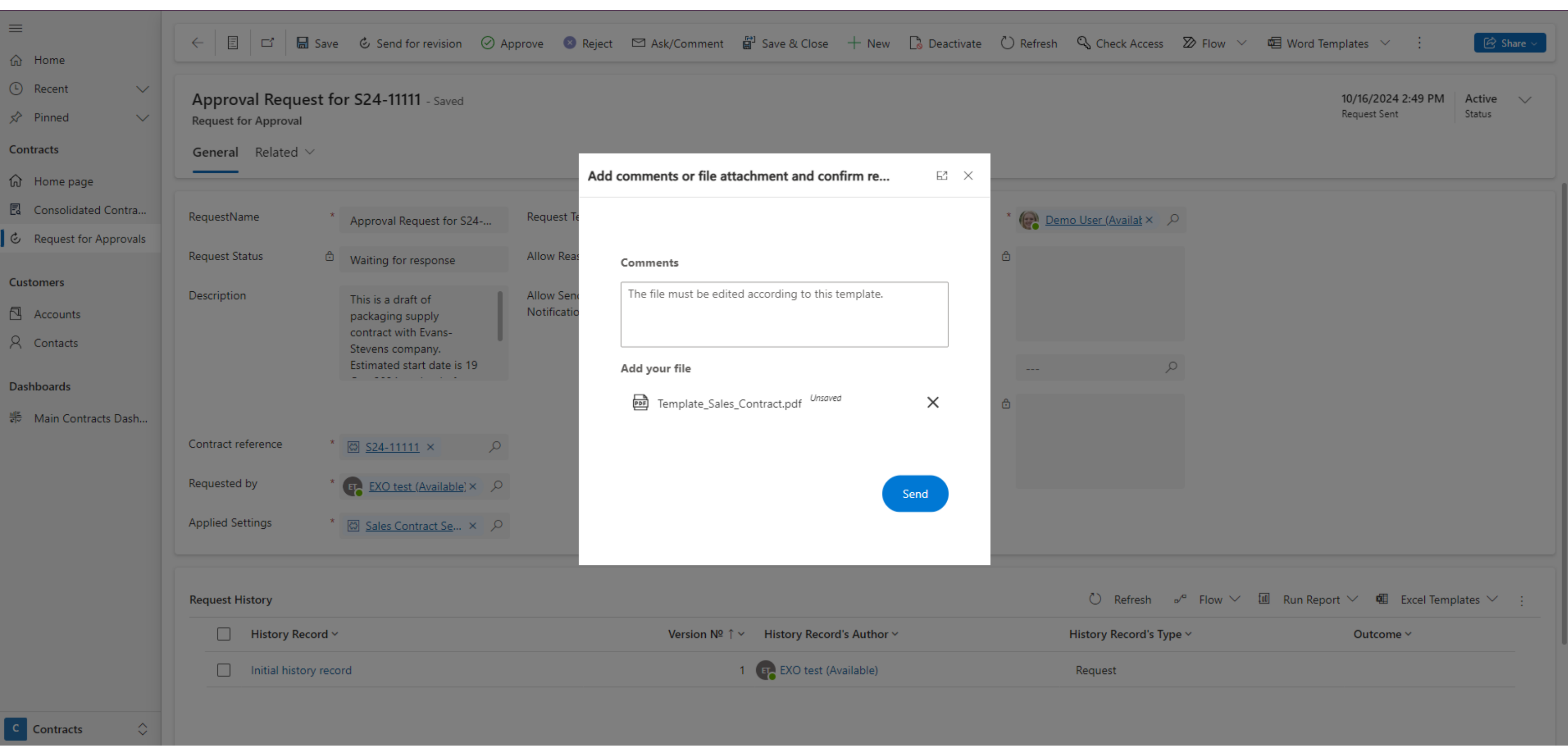
➢ Click the appropriate button on the command bar (Approve, Reject, or Send for Revision).

➢ In the window that appears, you can add files or comments as needed.

➢ Click **Send** to finalize your action.

Getting Started





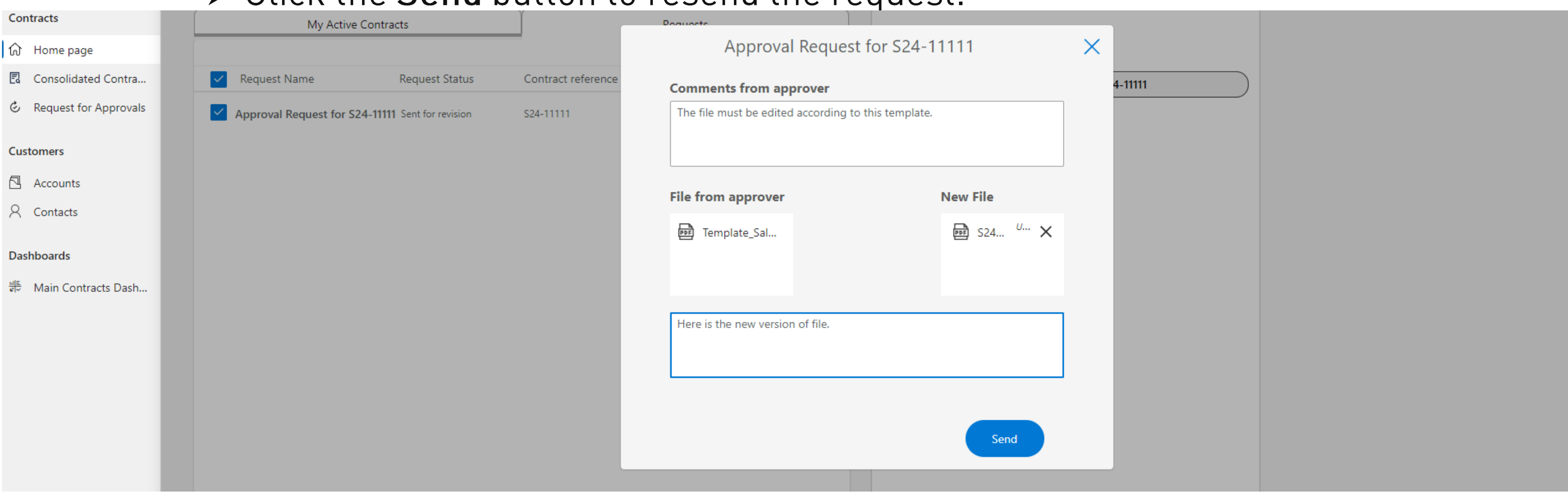
Getting Started

4.2. Resend After Revision

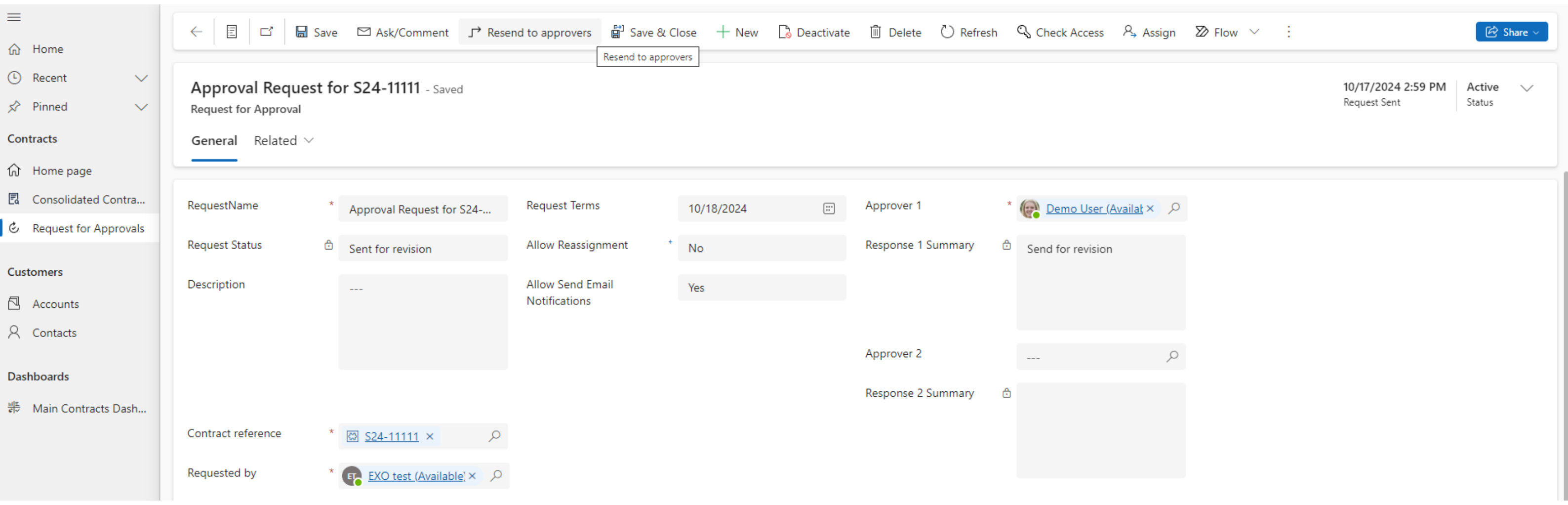
There are two ways to resend a Contract after it has been revised:

1. from the Homepage:

- Navigate to the homepage.
- Go to the **Requests** section and locate **Current Outgoing Requests**.
- Select the request you want to resend.
- In the window that appears, add any necessary files or comments.
- Click the **Send** button to resend the request.



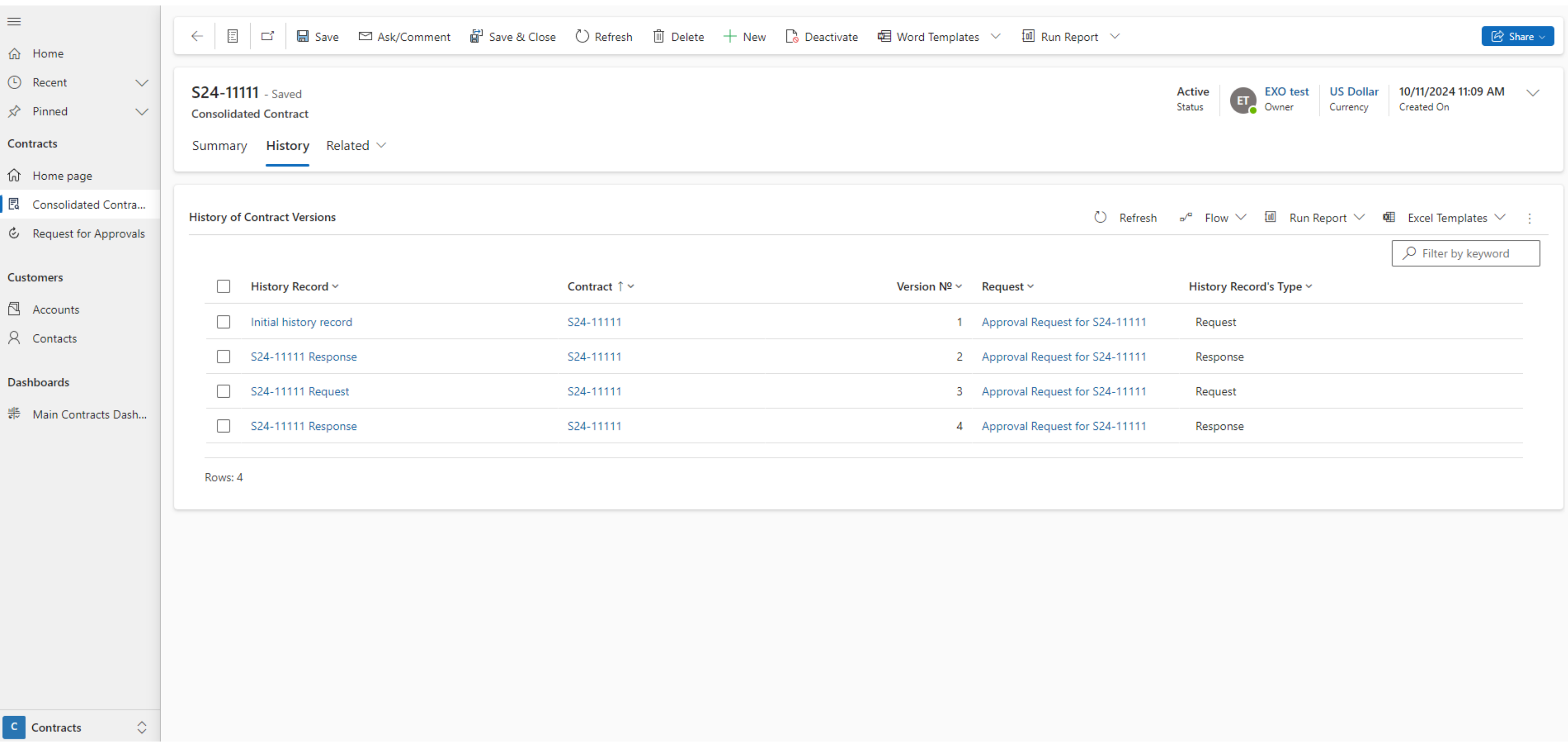
2. from the Requests for Approvals screen:
   - Navigate to the **Requests for Approvals** section.
   - Select the request you want to resend.
   - In the window that appears, add any necessary files or comments.
   - Click the **Send** button to finalize the resubmission.



Getting Started

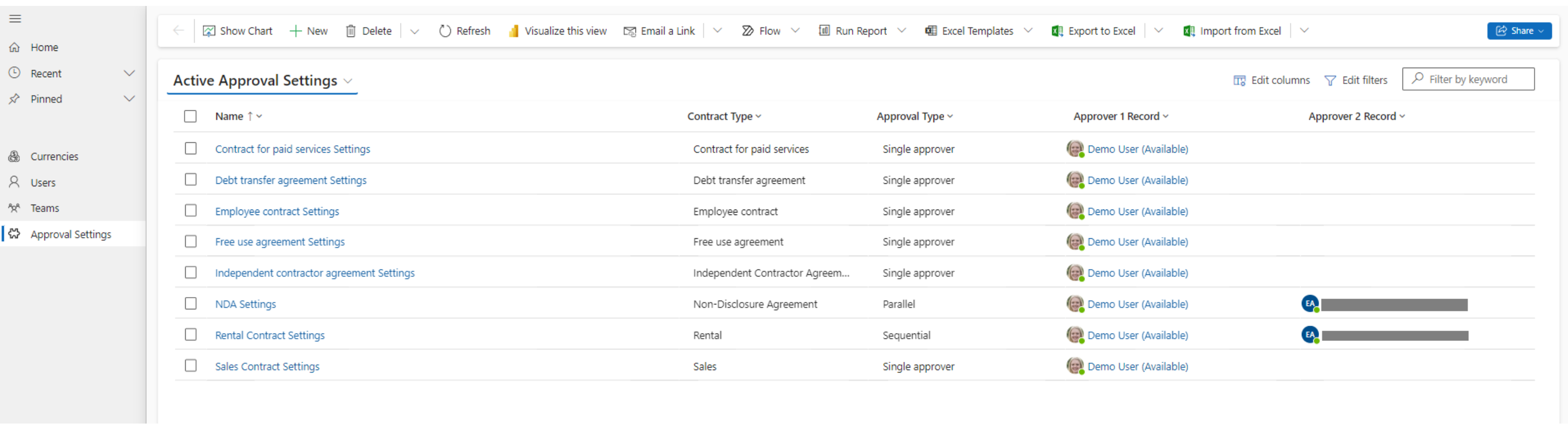
4.3. Request for Approvals history.

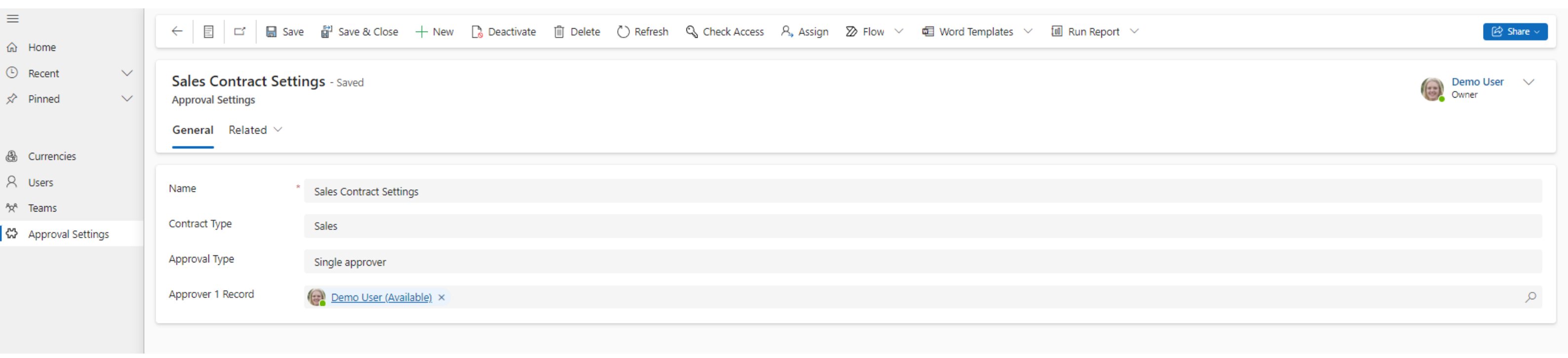
The feature in the Contracts Management Hub provides a comprehensive record of every revision and update related to each Request. This ensures transparency and allows users to track the progress and changes made throughout the Contract approval process.

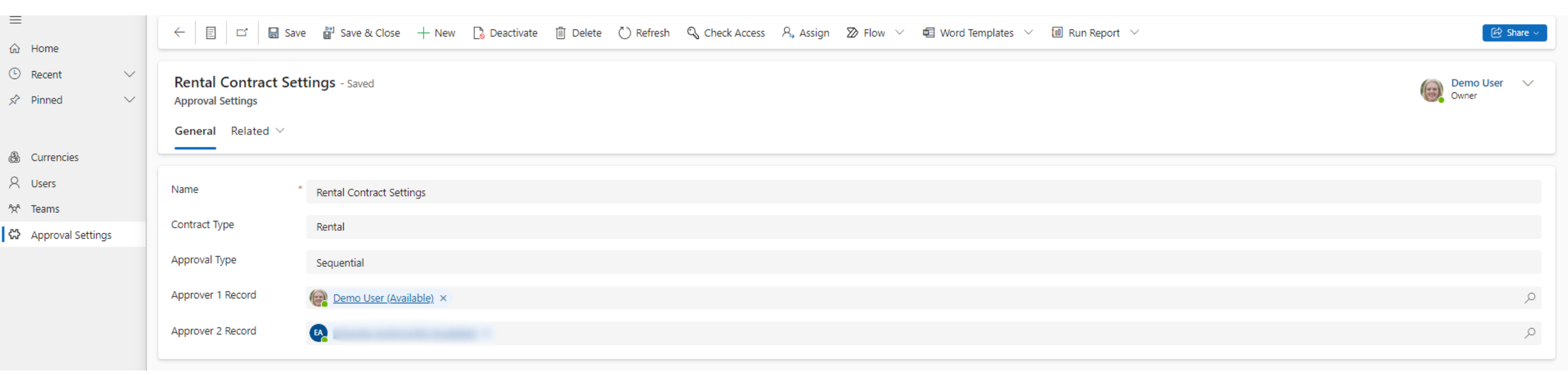


Advanced Features

- Approval settings for each Contract type.







- **Customizable Templates.** Use ability to create custom and share Word templates to standardize contract creation.
- **Integration with Other Systems.** Seamlessly integrate with other business systems for a unified workflow.
- **Audit Trails.** Maintain a detailed audit trail of all contract activities for transparency and accountability.

Support and Resources

Whether you're just getting started or need advanced assistance, our comprehensive support and resources are here to help you every step of the way.

Resource Center.

Explore extensive library of articles, tutorials, and FAQs designed to provide quick answers and step-by-step guidance on using Top-tier Contracts application and/or Contract Management Hub solution.

Support.

Our dedicated support team is available to assist with any issues or inquiries. Reach out to us via email, chat, or online request form for personalized support.

https://a3cloud.org/support

Trainings and Webinars.

Enhance your skills with training sessions and webinars. Learn best practices, new features, and tips to maximize your productivity with Top-tier Contracts application.

Feedback and Suggestions.

We value your feedback!

Share your thoughts and suggestions to help us improve **Top-tier Contracts**. Your input is valuable in shaping the future of the application and Contract Management Hub solution.

Feel free to contact us at contact@a3cloud.org