

TopTier Contracts

Solution Guide

(v 1.1.21)

TopTier Contracts is a Contract Lifecycle Management (CLM) solution built on Microsoft Power Platform. It helps organizations manage contracts through the complete lifecycle, from creation and review through approvals, execution, monitoring, and renewal within a controlled Microsoft-based workspace.

TopTier Contracts combines structured contract records, document management, configurable approval processes, lifecycle tracking, reporting, and Microsoft ecosystem integration to provide a centralized platform for contract management activities.

Built on Microsoft Dataverse and integrated with SharePoint, Teams, Outlook, Microsoft Entra ID, Microsoft Copilot, and Dynamics 365 applications, the solution enables organizations to manage contracts using technologies already adopted across the enterprise.

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

Data platform: Microsoft Dataverse and SharePoint Online

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

Roles in the Solution: User, Signatory, Administrator.

TopTier Contracts is designed for organizations that require controlled and transparent contract management processes, including:

- **Contract Managers.** Professionals responsible for overseeing the contract lifecycle, ensuring compliance, and managing contract-related activities.
- **Legal Departments and Corporate Counsel.** Lawyers and legal advisors who draft, review, and negotiate contract terms.
- **Procurement Officers and Vendor Management Teams.** Individuals involved in sourcing and managing supplier contracts.
- **Sales and Commercial Operations 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.

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Key Features

- **Contract Lifecycle Management**
 - Create, review, approve, execute, monitor, and renew contracts
 - Contract lifecycle tracking and governance
 - Contract milestone and expiration management
- **Document Lifecycle Management**
 - Contract document generation
 - Template-driven document management
 - SharePoint document storage and version management
- **Approval and Automation**
 - Multi-step approval workflows
 - Automated notifications
 - Audit history and tracking
- **Microsoft Ecosystem**
 - SharePoint document management
 - Entra ID security model
 - Microsoft Teams integration
 - Outlook notifications
 - Microsoft Copilot capabilities
 - Dynamics 365 interoperability

Contract Lifecycle Management

Contract Lifecycle Management

Manage contracts from creation to renewal in a single, controlled Microsoft-based workspace



☆ Gain complete visibility and control over your contract lifecycle, reduce risks, ensure compliance, and improve business outcomes.

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.

TopTier Contracts is a Model-driven PowerApps application. It was built within Power Apps TopTier Contracts 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.

TopTier Contracts uses a service Microsoft 365 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 M365 account.

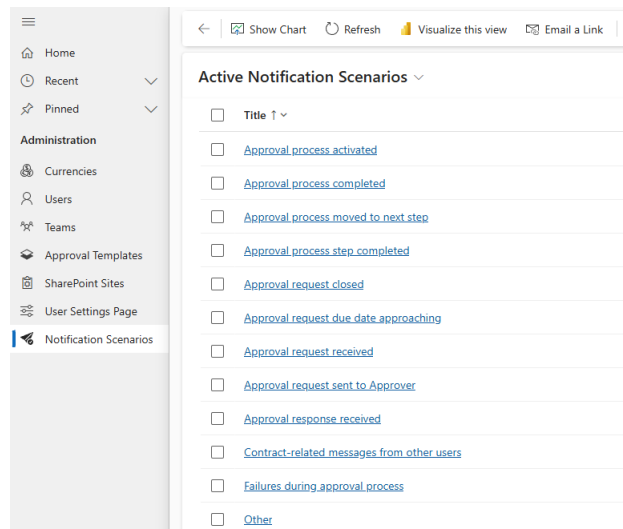
After TopTier Contracts installation, you need to configure application users. Basically, user management is built on Power Platform Environment users and teams. Initially, all Environment users are added to business unit teams without assigned roles. In order to provide access to TopTier Contracts,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

Security roles and their functions:

TopTier Contracts > **Security roles**

Display name ↑ ∨	Name ∨
 Administrator Top-tier Contracts	 Administrator Top-tier Contracts
 Signatory Top-tier Contracts	 Signatory Top-tier Contracts
 User Top-tier Contracts	 User Top-tier Contracts

The solution comprises custom workflow of sending notifications to users. This feature requires the **Notification Scenarios** table to be populated with demo data immediately following solution deployment.



App Home page

The homepage of **TopTier Contracts** application is designed to provide you with a streamlined and intuitive user experience. In the **My Work** area it shows all contracts and approval requests associated with the current user, organized into the corresponding tabs.

Contract Under Review. Contracts being drafted, updated, or pending approval.

My Approvals. Approval Requests awaiting response from the current user.

Waiting for Clarification. Approval Requests awaiting actions from the requestor.

My Requests. Approval Processes created by or owned by the current user.

My Contracts. All Contracts created by or owned by the current user.

The screenshot displays the 'TopTier Contracts' application interface. The top navigation bar includes 'Power Apps' and 'Top-tier Contracts'. The main header area shows 'SANDBOX' and a search bar. The left sidebar contains navigation links for Home, Recent, Pinned, Contracts, Counterparties, Approvals, Documents, and Dashboards. The main content area is titled 'My Work' and features five tabs: 'Contracts Under Review', 'My Approvals', 'Waiting for Clarification', 'My Requests', and 'My Contracts'. The 'Contracts Under Review' tab is active, showing a table of contracts. The table has columns for Contract ID, Status, Type, Counterparty, Internal Party, Total Amount, and End Date. The table lists several contracts, including EC-8671, FUA-6572, NDA-0762, NDA-1111, PS-1292, RC-8743, and SC-0001. The right sidebar contains 'Upcoming Contract Dates' and a 'Notifications' panel with various alerts.

Contract	Status	Type	Counterparty	Internal Party	Total Amount	End Date
EC-8671	Drafting	Employee contract		Our Corp - West Branch		12/31/2026
FUA-6572	Pending Approval	Free use agreement				10/31/2026
NDA-0762	Drafting	Non-Disclosure Agreement	Evans-Stevens			12/1/2030
NDA-1111	Pending Approval	Non-Disclosure Agreement	Evans-Stevens	Our Corp - West Branch		1/1/2030
PS-1292	Drafting	Contract for paid services	McDonald PLC	Our Corp - West Branch		12/31/2029
RC-8743	Pending Approval	Rental	Evans-Stevens	Our Corp - West Branch	\$3,000.00	8/31/2026
SC-0001	Pending Approval	Sales	Gross and Sons	Our Corp - West Branch	\$11,200.00	8/31/2026

For each record in the **My Works** area, user can view details, open full Model-driven form, and perform associated actions (e.g. register response for Approval Request or Notify on Contract).

Consolidated Contract 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.

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.**

Power Apps

Top-tier Contracts

Home

Recent

Pinned

Contracts

Renewals

Counterparties

Accounts

Contacts

Internal Companies

Signatories

Approvals

Approval Processes

Approval Requests

Documents

Documents Explorer

Contract Templates

Dashboards

Main Contracts Dash...

Contracts

SANDBOX

Show Chart

New

Activate

Deactivate

Delete

Refresh

Visualize this view

Email a Link

Run Report

Excel Templates

Export to Excel

Share

My Active Contracts

Edit columns

Edit filters

Filter by keyword

☐	Title	Contract Type	Contract Status	Effective Date	End Date	Next Renewal Date	Contract Owner	Status
☐	Application Support Specialist Employ...	Employee contract	Operating	6/1/2026	5/31/2028		Demo User (Offline)	Active
☐	Business Process Consulting Services	Independent Contractor Agreement	Operating	4/1/2026	3/31/2027		Demo User (Offline)	Active
☐	Commercial Receivables Transfer	Debt transfer agreement	Operating	7/1/2026	6/30/2027		Demo User (Offline)	Active
☐	Confidentiality Agreement for Product I...	Non-Disclosure Agreement	Operating	2/1/2026	1/31/2029		Demo User (Offline)	Active
☐	Cybersecurity Assessment Services	Contract for paid services	Operating	8/1/2026	7/31/2027		Demo User (Offline)	Active
☐	EC-8671	Employee contract	Drafting	10/1/2026	12/31/2026		Demo User (Offline)	Active
☐	Enterprise Software Subscription	Sales	Terminated	1/1/2026	12/31/2027		Demo User (Offline)	Active
☐	Equipment Evaluation Loan Agreement	Free use agreement	Operating	6/15/2026	6/14/2027		Demo User (Offline)	Active
☐	FUA-6572	Free use agreement	Pending Approval	10/11/2026	10/31/2026	11/1/2026	Demo User (Offline)	Active
☐	Hardware Supply Framework Agreement	Sales	Terminated	7/15/2026	7/14/2028		Demo User (Offline)	Active
☐	ICA-1551	Independent Contractor Agreement	Operating	11/2/2026	11/13/2026		Demo User (Offline)	Active
☐	ICA-3165	Independent Contractor Agreement	Expired		8/29/2026	10/1/2026	Demo User (Offline)	Active
☐	Managed Infrastructure Services	Contract for paid services	Operating	5/1/2026	4/30/2028		Demo User (Offline)	Active
☐	Munich Office Space Lease	Rental	Operating	3/1/2026	2/29/2028		Demo User (Offline)	Active
☐	NDA-0762	Non-Disclosure Agreement	Drafting		12/1/2030		Demo User (Offline)	Active
☐	NDA-1111	Non-Disclosure Agreement	Pending Approval	1/1/2026	1/1/2030		Demo User (Offline)	Active

Rows: 20

Pre-defined Contract types

TopTier Contracts offers the 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:

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)** 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, includes 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, contains sections for job responsibilities, compensation, benefits, and termination conditions.
8. **Debt Transfer Agreement** facilitates the transfer of debt obligations from one party to another, includes a unique three-party structure, including original debtor, new debtor, and creditor details, along with transfer terms and conditions.

The image shows a screenshot of a web form for creating a contract. The form is titled 'General' and has several fields: Title, Contract Type, Contract Status, Contract Owner, Applicable Law, Territory, In/Out, Currency, and Total Amount. The 'Contract Type' field is currently selected, and a dropdown menu is open, showing a list of pre-defined contract types: Sales, Non-Disclosure Agreement, Rental, Independent Contractor Agreement, Contract for paid services, Employee contract, Free use agreement, Debt transfer agreement, and Other. The 'Contract Status' field also has a dropdown menu open, showing a list of status options: --Select--.

Field	Value
Title	---
Contract Type	--Select--
Contract Status	✓ --Select--
Contract Owner	
Applicable Law	
Territory	
In/Out	
Currency	
Total Amount	

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.

The screenshot displays the 'RC-8743 - Saved' contract configuration page. The interface includes a top navigation bar with various actions like Save, New, Show Contract Folder, Notify, Save & Close, Refresh, Check Access, Delete, Assign, Run Report, Activate, and Deactivate. A left sidebar lists navigation options: Home, Recent, Pinned, Contracts, Renewals, Counterparties, Approvals, Documents, and Dashboards. The main content area is divided into several sections: 'General' (Title: RC-8743, Contract Type: Rental, Contract Status: Pending Approval, Contract Owner: Demo User (Away), Applicable Law: Austria, Territory: ---, In/Out: In, Currency: US Dollar, Total Amount: \$3,000.00), 'Contract Dates' (Start Date: 8/1/2026, End Date: 8/31/2026, Signing Date: 7/29/2026, Effective Date: 8/15/2026), 'Required Notices' (Is Renewal Notice Required: No, Is Termination Notice Required: Yes, Required Term of Termination Notice (Days): 10, Termination Notice Date Required: 8/21/2026, Renewal Notice Date Sent: M/d/yyyy, Termination Notice Date Sent: M/d/yyyy), 'Rental' (Rent Amount: \$3,000.00, Deposit: \$1,500.00), and 'Contract Parties' (a table with columns for Party Name, Party Role, Party Affiliation, and a checkbox). The table lists three parties: 'Our Corp - We...', 'Evans-Stevens', and 'Evans-Stevens'.

Party Name	Party Role	Party Affiliation	Related
Our Corp - We...	Renter	Internal	☒
Evans-Stevens	Lessor	External	☒

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, operating, on hold, or terminated.
- **Contract Parties** to list all the parties involved, along with their role, affiliation, related individual or legal entity and signatory.
- **Contract direction** to indicate whether the contract is incoming (received from external party) or outgoing (sent to external party).
- **Enhanced dates configuration** to manage all essential contract dates with precision.
- **Required Notices** to set up notifications about contract renewal and termination.
- **Contract Lines** to list Products which are the subject of the contract.

Document Management

The application supports integration with SharePoint for centralized storage and management of contract-related documentation. When SharePoint integration is enabled, each Contract record can have a dedicated SharePoint document location where users can store and manage files associated with the contract.

Configuration

To enable SharePoint synchronization for Contract records:

- Navigate to **Advanced Settings > Document Management**.
- Open **Configure server-based SharePoint integration** and complete all the steps.
- Open **Document management settings** and set up integration for Contract and Contract Template Entities.

RC-8743 - Saved Contract

Pending Approval Contract Status Active Status

Summary Documents Contract Parties Renewals Billing Delivery Contract Lines Financials Approvals

Show Contract Folder

Name	Path	Modified	Modified by	Created On SharePoint
RF-8743.pdf	RC-8743_A9DD2FDBF5A1F111B8DC7CE...	8/28/2026 8:35 AM	Demo User	8/28/2026 8:35 AM

After configuration is completed:

- A Contract record is created or updated within the application.
- The system automatically creates or identifies the corresponding SharePoint folder.
- Users can upload document directly on the Contract form or from the home page.
- Users can access and manage documents directly from the Contract form or view the full list of folders in *Document Explorer*.

Users must have appropriate permissions in both the application and the configured SharePoint site.

➔ Upload Document

Contract Templates

Contract Template repository allows users to standardize contract creation and reduce manual document preparation effort. A Contract Template represents a predefined contract structure and a document, that can be automatically populated and reused across multiple contracts.

Contract for Paid Services Template - Saved

Active Status | org74da19fb | Owning Business Unit

Form assist

General | Related

Template Name: Contract for Paid Services Template

Template Code: 222

Template Type: Contract

Description: ---

Is Default Template? No

Approved On: M/d/yyyy

Effective From: 1/15/2026

Effective To: M/d/yyyy

Applicable

Applicable Business Unit: ---

Applicable Internal Company: ---

Applicable Contract Type: Contract for paid services

Applicable Counterparty Role: ---

Applicable Counterparty Type: Legal Entity

Applicable Jurisdiction: ---

Template Processing Status

Generated

Modified On: 8/27/2026 2:12 PM

Contract for Paid Services Template.docx
Select to download

Upload Template

Template Documents

New

Name Path

Contract for Paid Services Template.docx Contract for Paid Service

Users should attach files through the **Upload Template** panel from the ribbon button. The uploaded file will be processed, attached to the to the corresponding SharePoint folder and displayed in the **Template Documents**.

After receiving successful template processing notification and Users are available to use Document Generation feature on **Home Page > Generate from Template**. Choose Contract and Contract Template records, click Generate and wait for the notification regarding generation result.

Generate from Template

Contract

Search by contract title, counterparty, status, end date

No contract selected

* Contract is required

Template

Search by contract title, counterparty, status, end date

No template selected

* Template is required

My Work

Contracts Under Review	My Approvals	Waiting for Clarification	My Requests	My Contracts
☐ Contract	Status	Type	Counterparty	Internal Party
☐ EC-8671	Drafting	Employee contract	Our Corp - West Branch	12/31/2026
☐ FUA-6572	Pending Approval	Free use agreement	10/31/2026	
☐ NDA-0762	Drafting	Non-Disclosure Agreement	Evans-Stevens	12/1/2030
☐ NDA-1111	Pending Approval	Non-Disclosure Agreement	Evans-Stevens	1/1/2030
☐ PS-1292	Drafting	Contract for paid services	Mcdonald PLC	Our Corp - West Branch
☐ RC-8743	Pending Approval	Rental	Evans-Stevens	Our Corp - West Branch
☐ SC-0001	Pending Approval	Sales	Gross and Sons	Our Corp - West Branch

Contract Review & Approval Management

TopTier Contracts application uses custom Approval Workflows designed to streamline the approval process and ensure efficiency and accountability at every step.

These workflows empower users to initiate contract approvals seamlessly.

On the approval side of the process, approvers can receive these requests, review details on the form, and take appropriate actions. They have the flexibility to approve, reject, or send the request back to requestor for revision.

An approval workflow initiated for an individual Contract, Renewal or Invoice is defined by a record of the Approval Process table. Each process consists of one or multiple sequential steps. Every step combines a certain number of requests assigned to designated approvers. When approvers submit their decisions, corresponding approval responses are recorded.

New Contract

New Request

Upload Document

Generate from Template

Contracts Requiring Attention

3

Action Needed >

My Pending Approvals

1

Waiting for your decision >

My Requests in Progress

4

Requests you created >

Signature Pending

0

Awaiting signatures >

Total Contracts

4

All Contracts >

My Work

Contracts Under Review

My Approvals

Waiting for Clarification

My Requests

My Contracts

☐	Approval Process	Status	Contract reference	Current Step
☒	Approval Process for RC-8743	Pending	RC-8743	Confirmation from EXO Test
☐	Approval Process for SC-0001	Pending	SC-0001	Sales team
☐	Approval Process for FUA-6572	Pending	FUA-6572	Legal team
☐	Approval Process for Office Infrastructure Hardware Supply	Approved	SC-2013	Completed

Process

Open record Approval Process for RC-8743

Current step: Confirmation from EXO Test

Started on: 27 Aug 2026 12:12

Current process status: Pending

Process Steps (map):

Process Step	Status	Approver
Confirmation from Pending		EXO test
Confirmation from Draft		BizApps ServiceAccount

Contract Review & Approval Management

Key Features

- **Initiating Approval Requests**

Users can easily send contracts, renewals or invoices for approval. This initiates the workflow, prompting the relevant approvers to take action. The easiest way to create the process is the *Request Approval* button on the command bar of the corresponding entity form. Note that this is possible only for Draft records. Alternatively, the user can navigate to Approval Process main grid and press *New* button. Both options open a process configuration page. *Confirm* button saves the process in Draft status. User may start it (update to status Pending) straightaway on the configuration page or later on the process form.

- **Receiving and Reviewing Requests**

Workflow automatically defines time of sending requests to approvers according to process configuration. Upon receiving the request, approvers can review its details, navigate to related contract, renewal or invoice, ensuring all necessary information is included and accurate.

- **Approval Actions**

- Approve: Confirm the contract, renewal or invoice is ready to proceed.
- Reject: Decline the contract, renewal or invoice, providing reasons for the rejection.
- Send for revision: Make necessary changes to the contract, renewal or invoice during the approval process.

- **Approval step type and logic**

The solution supports parallel and sequential configuration of approval steps. Parallel step sends all the requests simultaneously; sequential step follows the predefined order. Parallel steps are categorized based on the logic of processing incoming responses.

- **First to respond.** Step closes with status Approved if any Approve response is received.
- **Everyone must approve.** Step closes with status Approved only if all approvers submit an approval response.

In all cases, Reject response closes current step and the whole process with status Rejected.

Automated workflows

The automated workflows in the TopTier Contracts application leverage Microsoft Power Automate to automate 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

- **Notification Management**

Automated notifications keep all stakeholders informed about significant events. Notifications are triggered for various actions, including:

- Approval workflow activities.
- Contract status changes.
- Messages from other users regarding contracts that require attention.
- Result of Contract Document generation from template.

Each user can manage their own notification preferences to control which notifications they receive.

- **Notify on a Contract process**

The solution includes a business process to Notify other users about significant contract changes. This process ensures that all necessary comments are gathered and routed to the selected people via Outlook and Teams.

- **Document Management**

The TopTier Contracts solution provides synchronization between records of Contracts and documents stored on a connected SharePoint site. Additionally, it streamlines the process of creating new documents by allowing to set up Contract Templates and use them for file generation.

TopTier Contracts > Cloud flows

	Display name 
	Notify About Contract
	Notify Contract Document Generation Result
	Process Contract Document Generation
	Process Contract Template
	Request Statuses Processing
	Send Notifications Child Flow
	Start Or Close Approval Process Step
	Upload Document To SharePoint

Accounts management

TopTier Contracts 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.

The screenshot displays the 'Evans-Stevens' account record in the TopTier Contracts system. The interface includes a top navigation bar with various actions like Save, New, Deactivate, and Connect. The account details are organized into several sections:

- ACCOUNT INFORMATION:** Fields for Account Name (Evans-Stevens), Phone (+49 4266 7731182), Fax, Website (https://evansstevens.com), Parent Account, Ticker Symbol, and a toggle for 'Associated with Our Organization' (set to No).
- ADDRESS:** Fields for Address 1: Street 1 (944 Shawn Freeway), Address 1: Street 2, Address 1: Street 3, Address 1: City (Berlin), and Address 1: State/Province.
- Timeline:** A section for tracking activities with a search bar and a note entry field. It includes a 'Get started' prompt to 'Capture and manage all records in your timeline.'
- Primary Contact:** A section for the primary contact, Sharon Stewart, with fields for Email (sharon_stewart@example.com) and Business Phone (+49 6188 7219694).
- CONTACTS:** A list of contacts, currently showing Sharon Stewart with a 'Select all' checkbox and a list of other contacts.

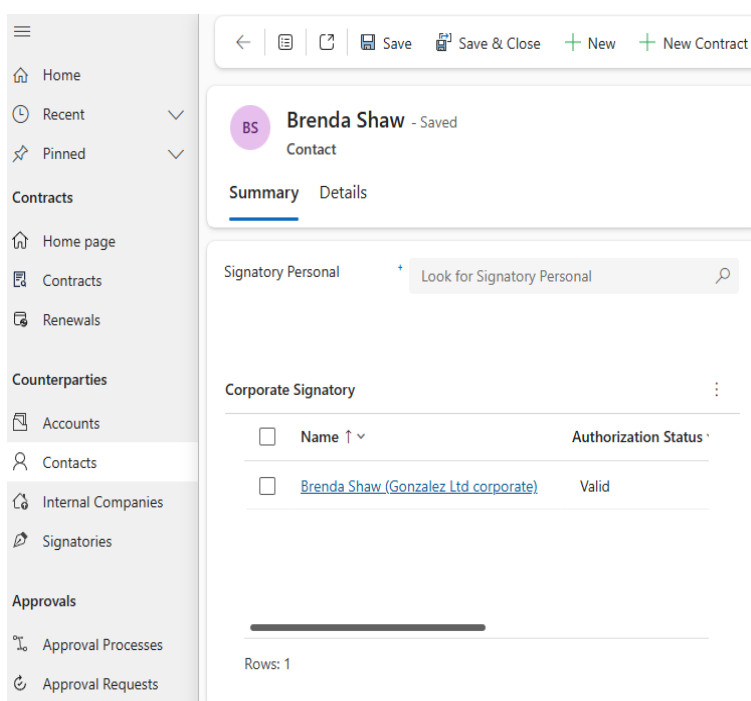
Contacts management

Built on the robust Common Data Model within Microsoft Dataverse, the Solution provides 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.

- **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.



Internal Companies management

Internal Company entity provides functionality of tracking information related to branches of the organization using the application:

- **Company Information.** Store and manage detailed internal company information, including addresses, financial details, size and key representatives.
- **Bank Details Management.** Store and manage detailed banking information for each internal company, including bank names, account numbers, SWIFT codes, and other relevant financial details.
- **Signatories and Contract Parties.** Maintain records of authorized signatories for each internal company, including their roles and contact information. Relate company records with contract parties for each contract in which they participate.
- **Integration with Contracts.** Seamlessly link company records to contract records, ensuring that all relevant company information is readily accessible during contract creation, approval, and management processes.

Our Corp - West Branch - Saved

org74da19fb
Owning Business Unit

100
Number of Employees

General

Contracts

Signatories

Bank Details

Address

Related

Form assist

Company Name

Our Corp - West Branch

Company Code

WB1432

Parent Internal Company

Is Default Company?

No

Contacts

Primary Contact

BizApps ServiceAccount (Offline)

Accountant

Look for Accountant

Chief Execution Officer

Chief Finance Officer

Chief Operation Officer

Description

Taxpayer ID

11111

Taxpayer Number

123-12-1234

Is VAT Payer?

Yes

Taxpayer VAT ID

123123

VAT Rate

0.20

Financial

Currency

US Dollar

Current Period Revenues

Current Period Revenues (Base)

Current Period Expenses

Current Period Expenses (Base)

Featured Analytics

TopTier Contracts includes analytics capabilities that provide users with insightful dashboards to monitor and manage contract-related activities effectively. The analytics feature is presented through the Main Contracts 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.

Getting Started

1. Accessing the App.

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

2. Creating a New Contract

Creating a contract in the TopTier Contracts 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 Contract** button.
- Fill in the required fields in the contract creation form (such as contract title, 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.

The screenshot displays the 'NDA-1111' contract form within the TopTier Contracts application. The interface includes a top navigation bar with various actions like 'Request Approval', 'Save', 'New', 'Show Contract Folder', 'Notify', 'Save & Close', 'Refresh', 'Check Access', 'Delete', 'Assign', 'Run Report', 'Activate', 'Deactivate', and 'Share'. The left sidebar shows a navigation menu with options like 'Home', 'Recent', 'Pinned', 'Contracts', 'Home page', 'Contracts', 'Renewals', 'Counterparties', 'Accounts', 'Contacts', 'Internal Companies', 'Signatories', 'Approvals', 'Approval Processes', 'Approval Requests', 'Documents', 'Documents Explorer', 'Contract Templates', 'Dashboards', and 'Main Contracts Dash...'. The main form area is divided into several sections: 'General' (Title: NDA-1111, Contract Type: Non-Disclosure Agreement, Contract Status: Drafting, Contract Owner: Demo User (Away), Applicable Law: Austria, Territory: ---, In/Out: In, Currency: US Dollar, Total Amount: ---), 'Contract Dates' (Start Date: 1/1/2026, End Date: 1/1/2030, Signing Date: 12/29/2025, Effective Date: 1/1/2026), 'Required Notices' (Is Renewal Notice Required? No, Is Termination Notice Required? Yes, Required Term of Termination Notice (Days): 30, Termination Notice Date Required: 12/1/2029, Renewal Notice Date Sent: M/d/yyyy, Termination Notice Date Sent: M/d/yyyy), and 'Contract Parties' (a table with columns for Party Name, Party Role, and Party Affiliation). The 'Contract Parties' table lists three parties: Evans-Stevens (Owner, External), Our Corp - We... (Client, Internal), and a third party with a checkbox. The 'Contract Lines' section on the right shows a table with columns for Name, Quantity, and Total, but it is currently empty, displaying a message: 'We didn't find anything to show here'.

Getting Started

2. From the main grid

- Navigate to the Contract grid through the Site Map.
- Click on the **+New** button.
- Fill in the form as described in the previous method.

3. From the Account/Contact/User form

- Navigate to the record of Account, Contact or User.
- Click on the **+New Contract** button.
- Fill in the Contract and the Contract Party details. This method of contract creation automatically adds a contract party to it.

Create Contract

Contract

Name / Title

*

Type

*

Status

*

Drafting

End Date

*

Applicable law

Currency

*

US Dollar

Total Amount

Is Termination Notice Required?

*

☒ Yes

Termination Notice Term (days)

*

Contract Party

Name / Title

Evans-Stevens

Role

*

Type

Legal Entity

Affiliation

External

Signatory

+

Create Contract

Cancel

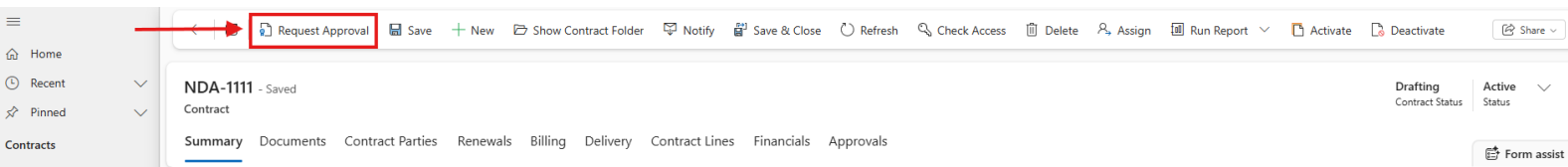
Getting Started

3. Send Request.

There are two ways to create and send a Request for approval in the TopTier Contracts:

1. From Contract, Invoice or Renewal form (only for records with status Drafting):

- Open the record form and click on the **Request Approval** button.
- In the pop-up window select **Create new Process**.



2. From Approval Process grid:

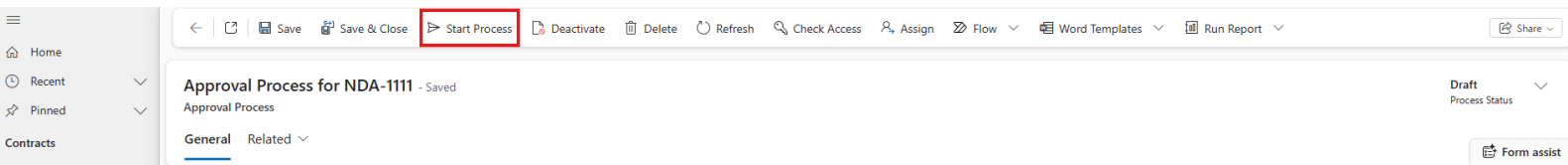
- Navigate to the Approval Process grid.
- Click **+ New** button.

Both methods open approval process configuration page.

Add Approval Steps, fill in title, type, logic, limit days and select approvers for each step.
Select **Confirm** to save the process.

Getting Started

Once the process is saved, users are offered to start it. In case of refusal, it is possible to start it later by clicking Start Process button on the form of the process record.



All Approval Processes created by user are displayed on **My Requests** view.

4. Processing Requests for Approvals.

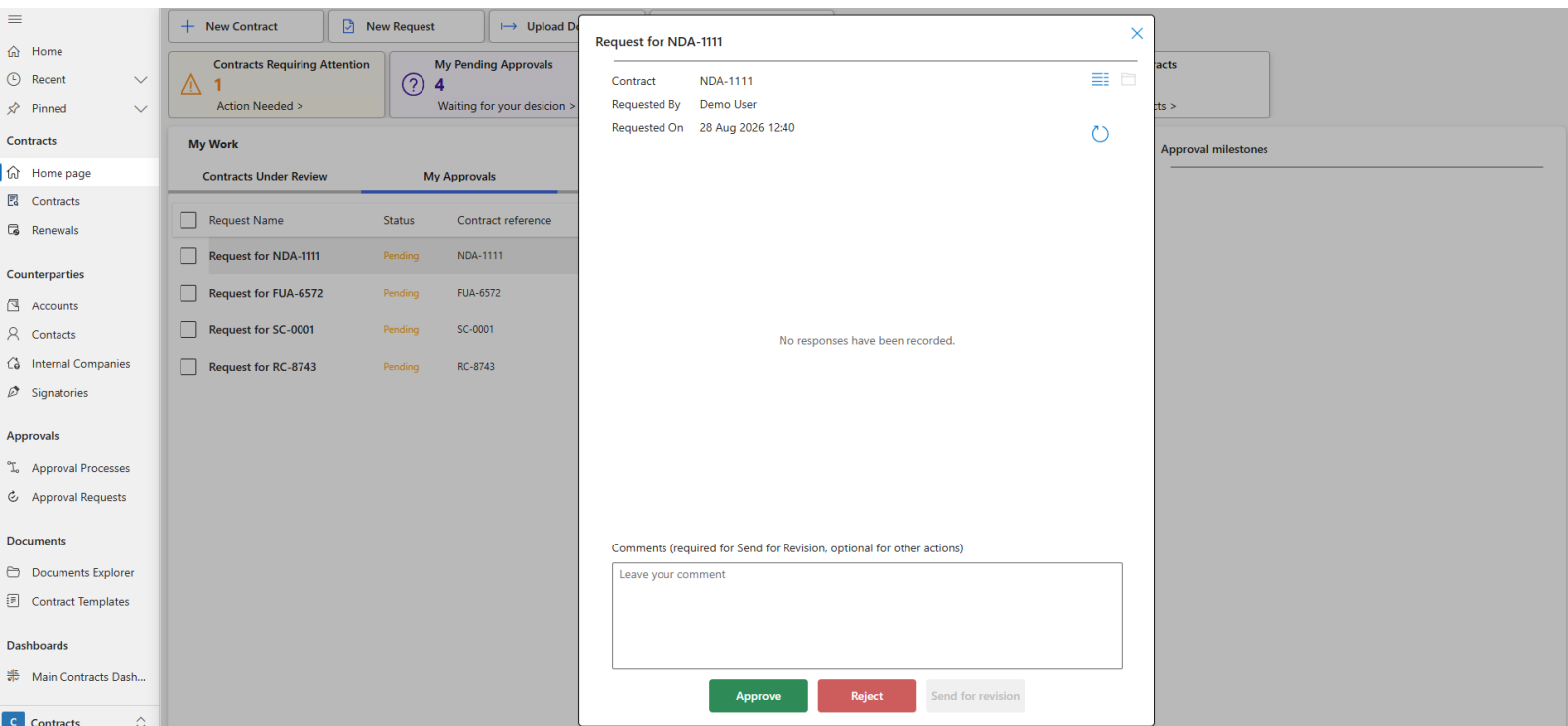
Approvers can see all Approval Requests assigned to them during all Approval Processes on **My Approvals** tab.

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

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

1. From the **My work** area on **Homepage**

- Navigate to the homepage and locate the **My Approvals** view.
- Select the request you want to act on.
- In the window that appears, you can add comments as needed.
- Choose the appropriate action button (Approve, Reject, or Send for Revision) to record the response.



Getting Started

2. From the Approval Requests form

- Navigate to the **Approval Requests** 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 comments as needed.
- Click **Send** to finalize your action.

The screenshot shows the 'Approval Requests' form for 'Request for NDA-1111'. The command bar at the top includes buttons for 'Send for revision' (highlighted in red), 'Approve', and 'Reject'. The form details include:

- Contract reference: NDA-1111
- Approver: EXO test (Offline)
- Requested by: Demo User (Offline)
- Request Due Date: (empty)
- Allow Reassignment: No
- Allow Send Email Notifications: Yes

The 'Responses' section shows a table with columns 'Response Name', 'Result', and 'Created On'. The table is currently empty, displaying a message: 'We didn't find anything to show here'.

The screenshot shows the same 'Approval Requests' form, but with a 'Confirm response' dialog box open. The dialog box contains a text area with the comment 'The NDA-1111 contract is correct.' and a 'Send' button.

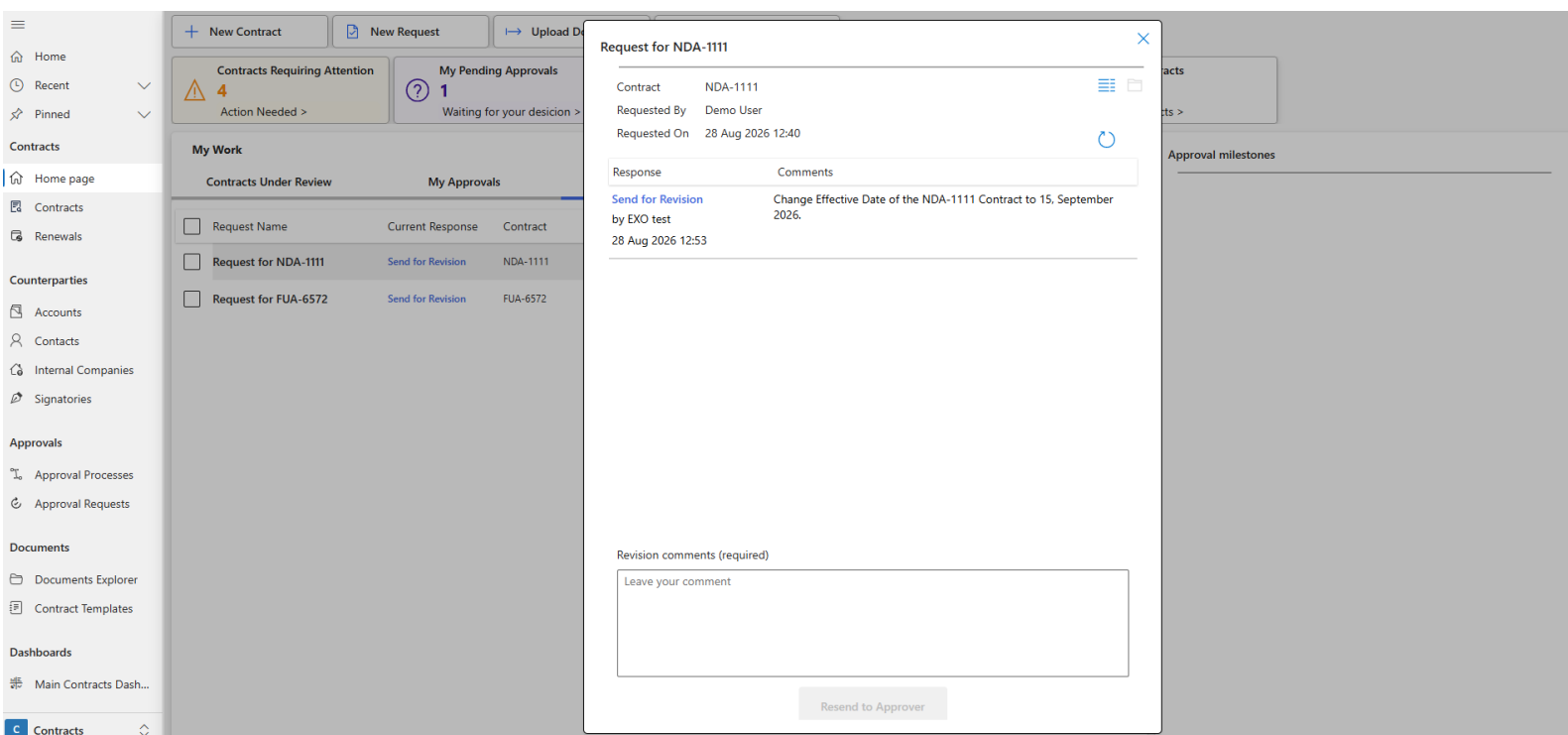
Getting Started

4.2. Resend After Revision

Sending request for revision addresses it back to requestor for making updates to the contract, renewal or invoice. There are two ways to resend a request to approvers after all changes have been made.

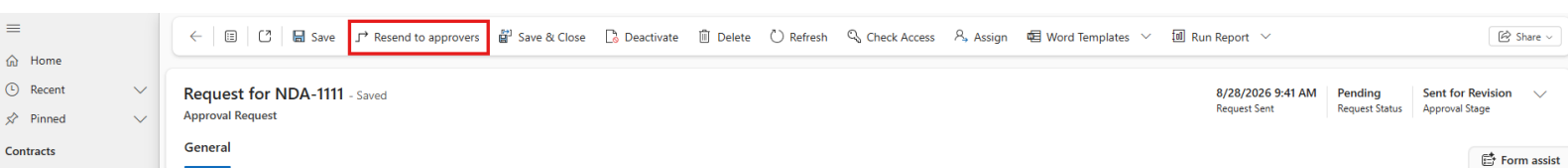
1. From the Homepage:

- Navigate to the homepage.
- Go to the **Waiting for Clarification** view of **My Work** area.
- Select the request you want to resend.
- In the window that appears, add any necessary comments.
- Click the **Send** button to resend the request.



2. From the Requests for Approvals screen:

- Navigate to the **Approval Requests** section.
- Select the request you want to resend.
- In the window that appears, add any necessary comments.
- Click the **Send** button to finalize the resubmission.



Advanced Features

- **Financial Management.** Manage contract-related financial data using **Invoice**, **Price List**, **Vendor Price List**, and **Product** entities. These records can be associated with supported contract types to capture pricing information, track invoices, and maintain pricing details in a centralized location.

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Price Lists

Price Lists

Vendor Price Lists

Products

Products

←

Show Chart

+ New

Delete

↺ Refresh

Visualize this view

Email a Link

↗ Flow

Run Report

Excel Templates

Export to Excel

⋮

Share

Active Invoices

Edit columns

Edit filters

Filter by keyword

☐	Invoice Directi...	Invoice Num...	Title ↑	Invoice Sta...	Contract	Issuer Contract P...	Recipient Contract P...	Net Amo...	Tax Amou...	Gross Amo...	Invoice D...
☐	Purchase	INV-001184	Annual Support and Technical Assistance	Draft	ICA-3165	ICA-3165 - Our Cor...	ICA-3165 - Houston-S...	\$3,400.00			8/26/2026
☐	Purchase	INV-001201	Annual Support Services Q1	Draft	CPS-2999	CPS-2999 - Melton...	CPS-2999 - Jones-Joh...	\$4,500.00	\$900.00	\$5,400.00	1/15/2026
☐	Sales	INV-001205	Cloud Infrastructure Subscription	Draft	SC-0002	SC-0002 - Our Cor...	SC-0002 - Wendy Cart...	\$5,600.00	\$1,120.00	\$6,720.00	3/22/2026
☐	Purchase	INV-001001	Contracted Project Management	Draft	CPS-2999	CPS-2999 - Jones-J...	CPS-2999 - Melton-M...	\$1,000.00			8/3/2026
☐	Purchase	INV-001204	Contracted Project Management	Draft	ICA-1551	ICA-1551 - Evans-S...	ICA-1551 - David Edw...	\$8,750.00	\$1,750.00	\$10,500.00	3/7/2026
☐	Purchase	INV-001208	Custom Development Milestone 2	Draft	CPS-2999	CPS-2999 - Melton...	CPS-2999 - Jones-Joh...	\$15,000.00	\$3,000.00	\$18,000.00	6/12/2026
☐	Sales	INV-001209	Hardware Maintenance Agreement	Draft	ICA-1551	ICA-1551 - Evans-S...	ICA-1551 - David Edw...	\$2,900.00	\$580.00	\$3,480.00	7/8/2026
☐	Purchase	INV-001203	Office Equipment Procurement	Draft	SC-0001	SC-0001 - Gross an...	SC-0001 - Our Corp -...	\$3,250.00	\$650.00	\$3,900.00	2/18/2026
☐	Sales	INV-001031	Office Infrastructure Hardware Supply	Draft	SC-2013	SC-2013 - Jones-Jo...	SC-2013 - Hunt LLC - J...	\$3,000.00			8/26/2026
☐	Sales	INV-001202	Software License Renewal	Draft	PS-1292	PS-1292 - Mcdonal...	PS-1292 - Our Corp -...	\$12,000.00	\$2,400.00	\$14,400.00	2/3/2026
☐	Sales	INV-001206	Technical Consulting Services	Draft	SC-2013	SC-2013 - Jones-Jo...	SC-2013 - Hunt LLC - J...	\$6,800.00	\$1,360.00	\$8,160.00	4/10/2026
☐	Purchase	INV-001207	Third-Party Security Audit	Draft	ICA-3165	ICA-3165 - Our Cor...	ICA-3165 - Houston-S...	\$9,200.00	\$1,840.00	\$11,040.00	5/5/2026

- **Built-in Document Explorer.** Access all contract-related document locations from a single workspace. Search and filter repositories, upload new files, and navigate directly to the corresponding SharePoint folders for streamlined document management.

	Upload Document	Default Site	CM3_testSynchronization	Open site	Loaded: 28 Aug 2026 15:33	Refresh
	Type	Contract Status	Start Date	End Date	Clear filters	6 folders
	Search					
	CPS-2999	Demo Contract	FUA-6572	ICA-3165		
	Contract for paid services	Contract for paid services	Free use agreement	Independent Contractor Agreement		
	Rejected	Drafting	Pending Approval	Drafting		
	- 23 Oct 2026	01 Sep 2026 - 30 Nov 2026	11 Oct 2026 - 31 Oct 2026	23 Aug 2026 - 29 Aug 2026		
	Melton-Mckenzie, Jones-Johnson	Counterparties haven't been defined yet	Counterparties haven't been defined yet	Our Corp - West Branch, Houston-Schultz		
	Open folder	Open folder	Open folder	Open folder		
	New1	RC-8743				
	Sales	Rental				
	Drafting	Pending Approval				
	- 23 Dec 2026	01 Aug 2026 - 31 Aug 2026				
	Houston-Schultz, Our Corp - West Branch	Our Corp - West Branch, Evans-Stevens				
	Open folder	Open folder				

Advanced Features

- **Approval Templates.** Streamline the creation of approval processes by using reusable Approval Templates. Users can save frequently used configurations as templates and apply them when creating new approval processes.
- **Contract Renewals.** Manage contract renewals within the application by linking renewal records to the original contract. Track renewal statuses, maintain a complete renewal history, and route renewal requests through the approval workflow when required.
- **Personal Notification Settings.** Customize your notification experience by managing notification preferences in a dedicated settings page. Users can enable or disable individual notification types and scenarios, according to their personal needs and responsibilities.

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Teams

Approval Templates

SharePoint Sites

User Settings Page

Notification Scenarios

S

Settings

User Settings

Preferred E-Sign provider

DocuSign

Notifications	In-App	Email	Teams Workflows Chat	Teams Channel
Approval process activated	On	On	On	On
Approval process completed	On	On	On	On
Approval process moved to next step	On	On	On	On
Approval process step completed	On	On	On	On
Approval request closed	On	On	On	On
Approval request due date approaching	On	On	On	On
Approval request received	On	On	On	On
Approval request sent to Approver	On	On	On	On
Approval response received	On	On	On	On
Contract-related messages from other users	On	On	On	On
Failures during approval process	On	On	On	On
Other	On	On	On	On

- **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 an extensive library of articles, tutorials, and FAQs designed to provide quick answers and step-by-step guidance on using TopTier 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 TopTier Contracts application.

Feedback and Suggestions.

We value your feedback!

Share your thoughts and suggestions to help us improve **TopTier 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