

WHERE TO FIND IT?

RdN Contract Vault adds one action to the navigation pane of selected role centers called All Contracts. There you can access your existing contracts or create new ones.

The screenshot shows the Dynamics 365 Business Central interface. The browser address bar displays `https://d4a8fbd00129/nav/`. The navigation pane on the left includes the following items: **CRONUS USA, Inc.**, Finance, Cash Management, Sales, Purchasing, Approvals, Self-Service, and Setup & Extensions. Under the Sales section, the following actions are listed: Customers, Vendors, Items, Bank Accounts, Chart of Accounts, and **All Contracts** (highlighted with a red box). Below the navigation pane, the main content area displays an insight: "INSIGHT FROM LAST MONTH: The best-selling item was **ATHENS Desk** with **18** units sold". Below this insight, there is a section titled "ACTIONS" with the following links: + Sales Quote, + Purchase Order, > Payments, Income Statement, and Excel Reports. Below the ACTIONS section, there is a section titled "Activities" with the following links: + Sales Order, + Purchase Invoice, > Reports, Statement of Cash Flows, + Sales Invoice, > New, Balance Sheet, and Statement of ...ned Earnings. At the bottom of the page, there is a section titled "Activities" with the following links: SALES THIS MONTH, OVERDUE SALES INVOICE AMOUNT, and OVERDUE PURCH. INVOICE AMOUNT.

You can also find a new action in your customer and vendor pages called Contracts. The action opens the Contract Information List page filtered on contracts involving the selected customer or vendor.

Customers - Dynamics 365

https://d4a8fbd00129/nav/?bookmark=21%3bEgAAAAJ78TEAMAAwADAAMA%3d%3d&node=0000233e-0000-000e-0008-0000836bd2

Dynamics 365 Business Central Customers

CRONUS USA, Inc. Finance Cash Management Sales Purchasing Approvals Self-Service Setup & Extensions

Customers Vendors Items Bank Accounts Chart of Accounts All Contracts

Customers: All Search + New Manage Report New Document Customer Page Show all

Customer	Balance	Open Invoices	Open Orders
10000 Adatum Corporation Robert Townes	0.00	0.00	0.00
20000 Trey Research Helen Ray	3,036.36	3,036.36	3,036.36
30000 School of Fine Art Meagan Bond	53,833.52	53,833.52	53,833.52
40000 Alpine Ski House Ian Deberry	4,316.92	4,316.92	4,316.92
50000 Relecloud Jesse Homer	8,836.80	8,836.80	8,836.80

Contract Approvals Contracts

Occurred while trying to get reports from the service. Please try again or contact your system administrator if the error persists.

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices
0	0	2	2
Ongoing Sales Credit Memos	Posted Sales Shipments	Posted Sales Invoices	Posted Sales Credit Memos
0	33	33	0

CREATING CONTRACTS

When you open the Contract Information List page and select New, the card page opens.

New - Contract Informa

https://d4a8fbd00129/nav/?company=CRONUS%20USA%2c%20Inc.&page=70101871&dc=0

Dynamics 365 Business Central All Contracts > Contract Information Card

HOME ACTIONS

Edit New Delete New Attachment Add User Add Everyone Remove User Previous Next

NEW - CONTRACT INFORMATION CARD

Contract Information Card

General

Date of Contract

Type of Party 1

Party 1

Name of Party 1

Type of Party 2

Party 2

Name of Party 2

Description of contract

Allowed Users

Attachment List

DESCRIPTION	CREATED
(There is nothing to show in this view)	

When I've put in my contract information I can add the actual contract as a PDF attachment to my record. This is done by using the action New Attachment and selecting your PDF in the dialog box.

NEW - CONTRACT INFORMATION CARD - C00008

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	ADMIN
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
(There is nothing to show in this view)	

The attachment will then appear in the Contract Attachment ListPartfactbox on the right side of the page. You can add more than one attachment to any contract. You can view your contract, or remove it, by clicking the three dots in the Description field and selecting an action.

NEW - CONTRACT INFORMATION CARD - C00008

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	ADMIN
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM

[Delete Line](#)
[View Attachment](#)
[Select More](#)

Our contract will now be displayed in the Contract Information List page but we can also access it through the customer the contract applies to. When we open the customers page we can press the action Contracts

Dynamic 365 Business Central Customers > 40000 - Alpine Ski House

Special Prices & Discounts

HOME ACTIONS NAVIGATE REPORT MANAGE

Manage New Document Request Approval Customer Page

EDIT - CUSTOMER CARD

40000 · Alpine Ski House

General

Name Alpine Ski House Total Sales 19,248.70

Balance (\$) 4,316.92 Costs (\$) 10,782.00

Balance Due (\$) 4,316.92 CFDI Purpose

Credit Limit (\$) 0.00 CFDI Relation

Blocked

Address & Contact

ADDRESS CONTACT

Address 10 Deerfield Road Primary Contact Code

Address 2 Contact Name Ian Deberry

Customer Picture

Attachments Documents

Sell-to Customer Sales History

Ongoing Sales 1 0 1

This will open the Contract Information List page showing only contracts involving this customer.

Dynamic 365 Business Central Customers > 40000 - Alpine Ski House

HOME ACTIONS

Manage New Manage Process Page

EDIT - CUSTOMER CARD

40000 · Alpine Ski House

General

Name Alpine Ski House

Balance (\$) 4,316.92

Balance Due (\$) 4,316.92

Credit Limit (\$) 0.00

Blocked

Address & Contact

ADDRESS CONTACT

Address 10 Deerfield Road

Address 2

Primary Contact Code

Contact Name Ian Deberry

VIEW - CONTRACT INFORMATION LIST + New

CONTRACT NO.	DATE OF CONTRACT	TYPE OF PARTY 1	NAME OF PARTY 1	TYPE OF PARTY 2	NAME OF PARTY 2	DESCRIPTION OF CONTRACT
C00007	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski House	Work Contract
C00008	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski House	Licensing Agreement

Close

Attachments Documents

Sell-to Customer Sales History

Ongoing Sales 1 0 1

USER PERMISSIONS

The Rdn Contract Vault extension is by default available to all users. However we can control the data available for each user. When you create a new contract in Contract Vault it is by default only viewable by you. This can be changed and lets see how. When you open the Contract Information Card page you'll see a few actions that control user permissions as well as the field Allowed Users which displays the users that can view the data.

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	ADMIN
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

To allow every user to access the contract we simply press the Add Everyone action.

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

Now we see that the Allowed Users field is empty. When the field is empty that means there are no user restrictions on the contract and all users have access to it.

Browser: Edit - Contract Informat X | URL: https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 | Business Central | All Contracts > C00008

HOME ACTIONS

Manage: Edit, New, Delete | Process: New Attachment, Add User, Add Everyone, Remove User | Page: Previous, Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

But let's say I want to just allow me (ADMIN) and two more users to access this contract, John and Jane. I can press the Add Me action to add me to Allowed Users.

Browser: Edit - Contract Informat X | URL: https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 | Business Central | All Contracts > C00008

HOME ACTIONS

Manage: Edit, New, Delete | Process: New Attachment, Add User, Add Everyone, Remove User | Page: Previous, Next

Add Me (highlighted)

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

Now to add John and Jane I press the Add User action

Edit - Contract Information

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract 3/8/2018 Party 2 40000

Type of Party 1 Name of Party 1 CRONUS USA, Inc. Name of Party 2 Customer

Type of Party 2 Description of contract Licensing Agreement Allowed Users ADMIN

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

This opens the User Setup page so I can select users. I select Jane and press OK, then do the same for John.

Edit - Contract Information

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAAwADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract 3/8/2018 Party 2 40000

Type of Party 1 Name of Party 1 CRONUS USA, Inc. Name of Party 2 Customer

Type of Party 2 Description of contract Licensing Agreement Allowed Users ADMIN

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 P

USER SETUP + New

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	RE... TIME	SALESPERS... CODE	TIME SHEE ADM	E-MAIL
JANE			<input type="checkbox"/>		<input type="checkbox"/>	
JOHN			<input type="checkbox"/>		<input type="checkbox"/>	
RALPH			<input type="checkbox"/>		<input type="checkbox"/>	

OK Cancel

Now we can see that Jane and John have been added to the Allowed Users field and can access the contract.

Edit - Contract Information

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAawADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	ADMIN,JANE.JOHN
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM

To block a user from accessing a contract I press the Remove User action.

Edit - Contract Information

https://d4a8fbd00129/nav/?bookmark=23%3bbqstBAJ7%2f0MAMAawADAAMAA4&page=70101871&company=CRONUS%20USA%2C

Dynamics 365 Business Central All Contracts > C00008

HOME ACTIONS

Edit New Delete New Attachment Add User Add Me Add Everyone Remove User Previous Next

EDIT - CONTRACT INFORMATION CARD

C00008

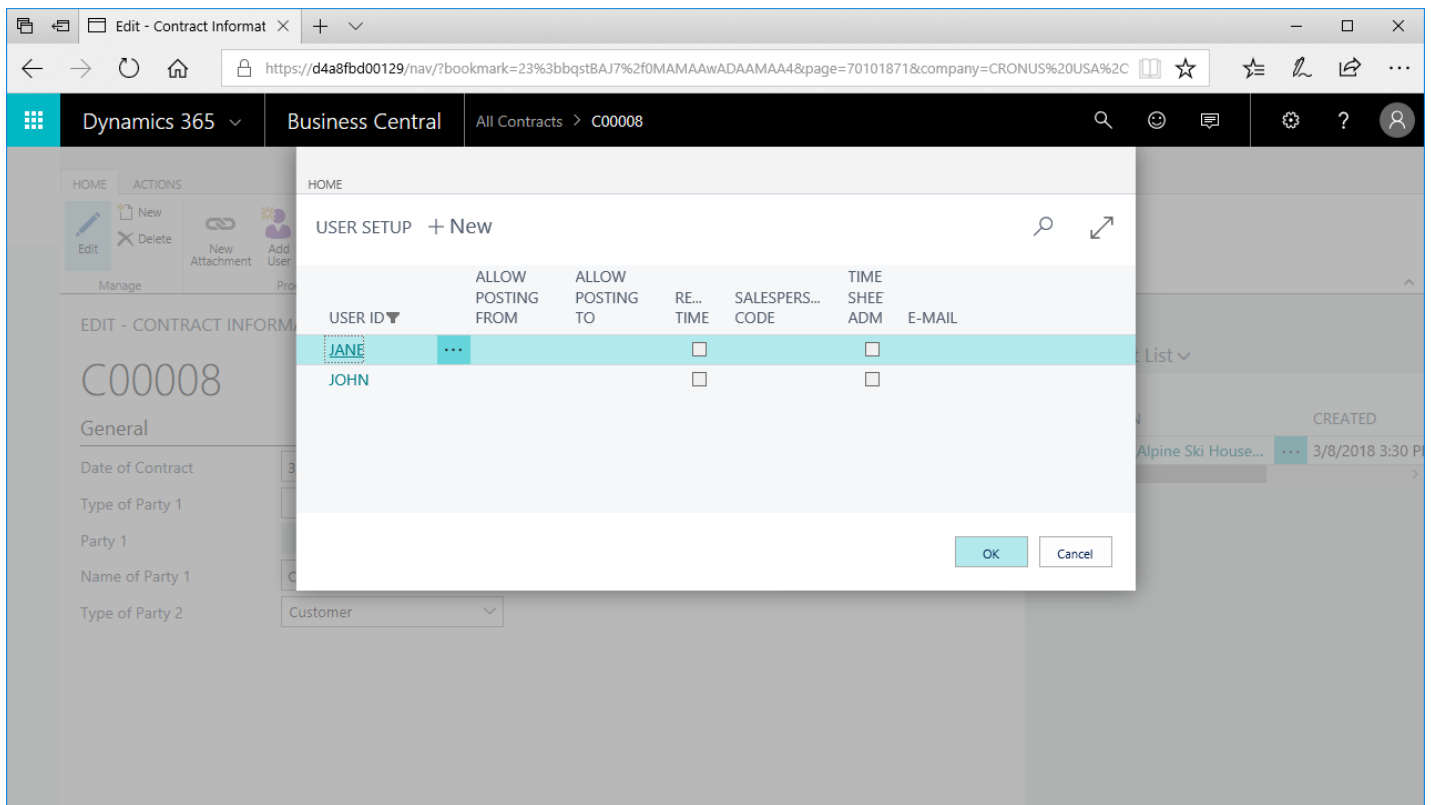
General

Date of Contract	3/8/2018	Party 2	40000
Type of Party 1		Name of Party 2	Alpine Ski House
Party 1		Description of contract	Licensing Agreement
Name of Party 1	CRONUS USA, Inc.	Allowed Users	ADMIN,JANE.JOHN
Type of Party 2	Customer		

Attachment List

DESCRIPTION	CREATED
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM

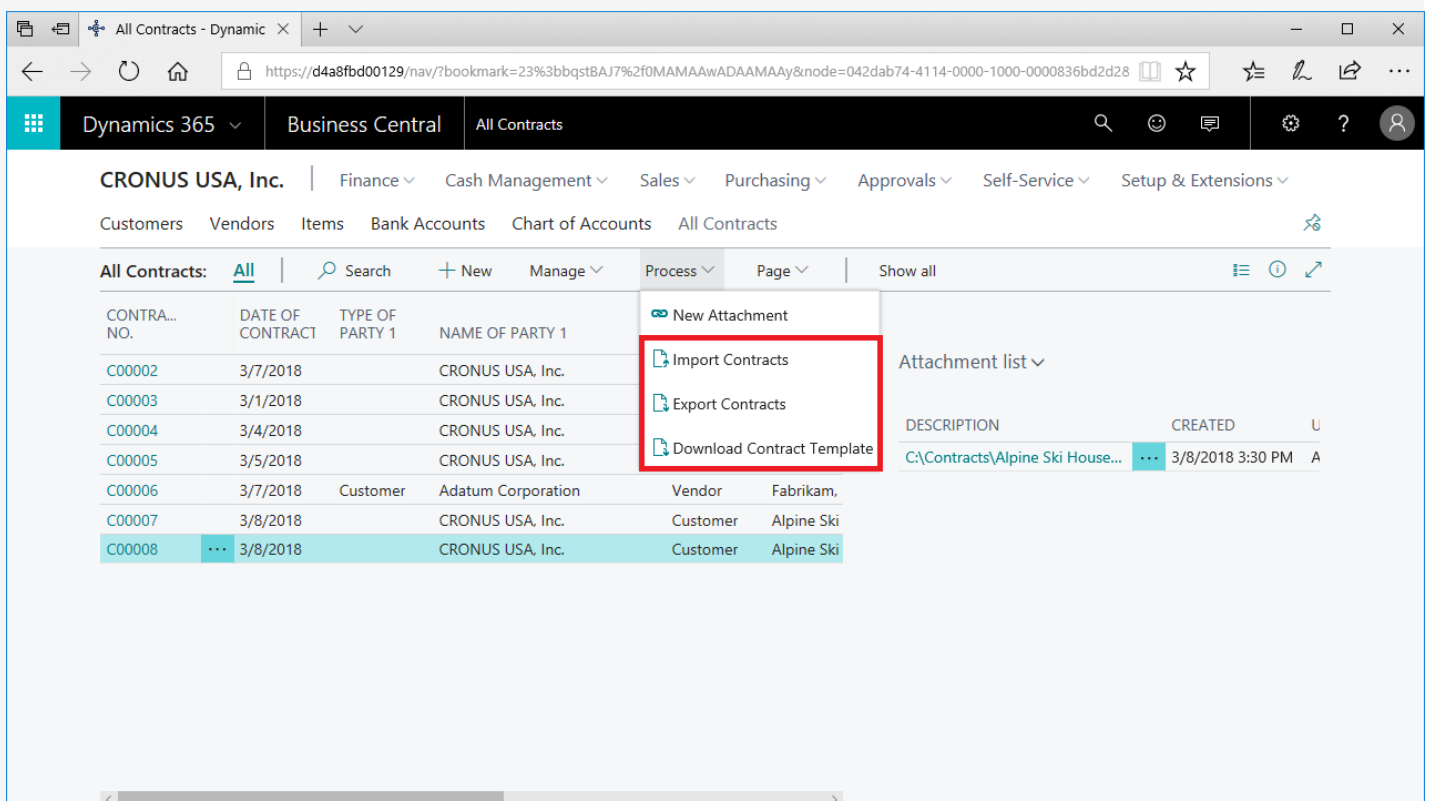
The User Setup page opens and I select the user I want to remove and then press OK.



IMPORT/EXPORT

To simplify insertion of a long list of contracts into RdN Contract Vault the Contract Information List page offers an option to import contracts from a Comma-Separated variables file (CSV). You can also export your contracts into a CSV file for storage. CSV files can be opened and edited with Microsoft Excel.

NOTE: Our CSV files are created using Business Central default field separator, the comma. Depending on your settings in excel or windows, excel might not show the file in the correct way. In that case you can change your settings to separate files by comma or simply edit the file from a text editor.



To import a CSV file it has to be in the right format. We recommend that you download the template by pressing the Download Contract Template action. It downloads a CSV file in the right

format so you can start adding contracts to your list.

Date	Name of party 1	Name of party 2	Description
3.8.2018	Placeholder company 1	Placeholder company 2	Placeholder Description

The top row are the headers and the bottom row is a placeholder contract. We can write down our contract information in an easy way in Excel.

Date	Name of party 1	Name of party 2	Description
3.8.2018	CRONUS USA, Inc.	John	Contract of Employment
3.8.2018	CRONUS USA, Inc.	Jane	Contract of Employment
3.8.2018	CRONUS USA, Inc.	Ralph	Contract of Employment

To import contracts we press the Import Contracts action and select our CSV file.

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions

Customers Vendors Items Bank Accounts Chart of Accounts All Contracts

All Contracts: All | Search | + New | Manage | Process | Page | Show all

CONTRA... NO.	DATE OF CONTRACT	TYPE OF PARTY 1	NAME OF PARTY 1	TYPE OF PARTY 2	NAME OF PARTY 2
C00002	3/7/2018		CRONUS USA, Inc.		
C00003	3/1/2018		CRONUS USA, Inc.		
C00004	3/4/2018		CRONUS USA, Inc.		
C00005	3/5/2018		CRONUS USA, Inc.		
C00006	3/7/2018	Customer	Adatum Corporation	Vendor	Fabrikam,
C00007	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski
C00008	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski

Attachment list

DESCRIPTION	CREATED	U
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM	A

Then we can see our contracts appear in our list.

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions

Customers Vendors Items Bank Accounts Chart of Accounts All Contracts

All Contracts: All | Search | + New | Manage | Process | Page | Show all

CONTRA... NO.	DATE OF CONTRACT	TYPE OF PARTY 1	NAME OF PARTY 1	TYPE OF PARTY 2	NAME OF PARTY 2
C00002	3/7/2018		CRONUS USA, Inc.	Customer	Trey Resea
C00003	3/1/2018		CRONUS USA, Inc.	Customer	Relecloud
C00004	3/4/2018		CRONUS USA, Inc.	Customer	Relecloud
C00005	3/5/2018		CRONUS USA, Inc.	Vendor	Graphic D
C00006	3/7/2018	Customer	Adatum Corporation	Vendor	Fabrikam,
C00007	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski
C00008	3/8/2018		CRONUS USA, Inc.	Customer	Alpine Ski
C00009	3/8/2018		CRONUS USA, Inc.		John
C00010	3/8/2018		CRONUS USA, Inc.		Jane
C00011	3/8/2018		CRONUS USA, Inc.		Ralph

Attachment list

DESCRIPTION	CREATED	U
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM	A

https://d4a8fbd00129/nav/?runiframe=1#

RdN Contract Vault offers the option to Export your contract list from the Contract Information List page to a CSV file. This is a good option if you want to keep a backup of your contract list or move the list between databases. To export you simply press the Export Contracts action.

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions

Customers | Vendors | Items | Bank Accounts | Chart of Accounts | All Contracts

All Contracts: [All](#) | Search | + New | Manage | Process | Page | Show all

CONTRACT NO.	DATE OF CONTRACT	TYPE OF PARTY 1	NAME OF PARTY 1
C00002	3/7/2018		CRONUS USA, Inc.
C00003	3/1/2018		CRONUS USA, Inc.
C00004	3/4/2018		CRONUS USA, Inc.
C00005	3/5/2018		CRONUS USA, Inc.
C00006	3/7/2018	Customer	Adatum Corporation
C00007	3/8/2018		CRONUS USA, Inc.
C00008	3/8/2018		CRONUS USA, Inc.
C00009	3/8/2018		CRONUS USA, Inc.
C00010	3/8/2018		CRONUS USA, Inc.
C00011	3/8/2018		CRONUS USA, Inc.

Process: New Attachment, Import Contracts, **Export Contracts**, Download Contract Template

Attachment list

DESCRIPTION	CREATED	U
C:\Contracts\Alpine Ski House...	3/8/2018 3:30 PM	A

This will download your contract list as file called MyContracts.csv

MyContracts.csv - Excel

File | Home | Insert | Page Layout | Formulas | Data | Review | View | Add-ins | Help | Dynamics NAV | Team | Tell me what you want to do | Share

Clipboard | Font | Alignment | Number | Styles | Cells | Editing

Date	Name of party 1	Name of party 2	Description
3.7.2018	CRONUS USA, Inc.	Trey Research	Pet Care
3.1.2018	CRONUS USA, Inc.	Relecloud	Contract for Staff Discounts
3.4.2018	CRONUS USA, Inc.	Relecloud	High Importance Customer
3.5.2018	CRONUS USA, Inc.	Graphic Design Institute	NDA
3.7.2018	Adatum Corporation	Fabrikam, Inc.	Reseller
3.8.2018	CRONUS USA, Inc.	Alpine Ski House	Work Contract
3.8.2018	CRONUS USA, Inc.	Alpine Ski House	Licensing Agreement
3.8.2018	CRONUS USA, Inc.	John	Contract of Employment
3.8.2018	CRONUS USA, Inc.	Jane	Contract of Employment
3.8.2018	CRONUS USA, Inc.	Ralph	Contract of Employment

MyContracts