

CRM^{FIRST}

PROCONTRACTS



Test Drive Instructions
proCONTRACTS

Welcome to the proCONTRACTS Test Drive Experience

During the next 24 hrs you will be granted access to our Microsoft Dynamics proCONTRACTS demo, where you will be able to go through our Contract Management solution and explore the features free of charge.

In this document we have put together a suggested list of features to try; However, it is helpful to remember that the solution can be further customised to suit your individual business needs.

If there are any questions regarding the proCONTRACTS solution or Test Drive experience, our team here at CRMFIRST are more than willing to help out – feel free to get in contact using the following;

CRMFIRST GmbH

support@crmfirst.de

+49 (69) 400 502 100

For email enquiries, please include “Appsource” in the subject line to be quickly redirected to our product team.

We look forward to hearing from you & wish you a pleasant and informative proCONTRACTS Test Drive Experience

Best Regards,

CRMFIRST proX Solutions Team


1. Testdrive Registration

Please register for proCONTRACTS Testdrive with your Microsoft Account, if not existing please create a new Microsoft Account.

After clicking on Test Drive (Testlaufwerk) a Link will be sent to your Email Address when the Test Drive has been fully loaded.

Please make sure that you open the Testdrive in an incognito window and/ or please log off and log back in again to avoid error messages.

Apps > proCONTRACTS Contract Management for Dynamics 365



proCONTRACTS Contract Management for Dynamics 365
CRMFIRST GmbH

Überblick Überprüfungen

proCONTRACTS for
Upgrade your business with

Imagine all your contracts on
proCONTRACTS for Microsoft
contract management; rang
personalized reminders, re

KONTAKT MIT MIR ...

TESTLAUFWERK

Was ist die Testversion?

Bei Microsoft AppSource anmelden

Geben Sie die E-Mail-Adresse des Kontos ein, das Sie beim Kauf von Apps in AppSource verwenden möchten.

i Für die von Ihnen ausgewählte App (proCONTRACTS Contract Management for Dynamics 365) ist ein Geschäfts-, Schul- oder Unikonto erforderlich, um den Vorgang fortzusetzen. Microsoft-Konten werden für diese App nicht unterstützt.

Geschäfts- oder Schulkonto

Anmelden

Sie haben kein Konto? [Für kostenloses Konto anmelden](#)

2. Navigation Overview

proCONTRACTS entity
– Click Here to open the
proCONTRACTS section of CRM

The screenshot displays the proCONTRACTS CRM navigation interface. At the top is a header bar with the 'proCONTRACTS' logo, a breadcrumb trail 'Contracts > Demo Service Contr...', and various utility icons. Below the header is a row of six main navigation tiles: Sales, Service, Marketing, proCONTRACTS (highlighted with a blue 'pc' icon), Settings, and Training. The main content area is organized into five columns: 'My Work' (containing 'Dashboards'), 'Customers' (containing 'Accounts' and 'Contacts'), 'Contract Managem...' (containing a list of contract-related items), 'Tools' (containing 'Reports'), and 'Extensions' (containing 'Sites Extensions'). Annotations with arrows point to specific elements: 'Dashboards' points to the 'Dashboards' tile; 'Contracts' points to the 'Contracts' item in the 'Contract Managem...' column; 'Contract Blocks' points to the 'Contract Blocks' item; 'Contract Configurations' points to the 'Contract Configurati...' item; and 'Site Extensions' points to the 'Sites Extensions' tile. A bracket groups the 'Contracts', 'Contract Blocks', 'Contract Configurati...', 'Contract Constructs', 'Schedule Workflows...', and 'Contract Serials' items under the heading 'Advanced Contract Administration Sections'.

My Work
Dashboards
An overview of all relevant contract data & reminders

Customers
Accounts
Contacts

Contract Managem...
Contracts
Contract Blocks
Contract Configurati...
Contract Constructs
Schedule Workflows...
Contract Serials

Tools
Reports

Extensions
Sites Extensions

Advanced Contract Administration Sections

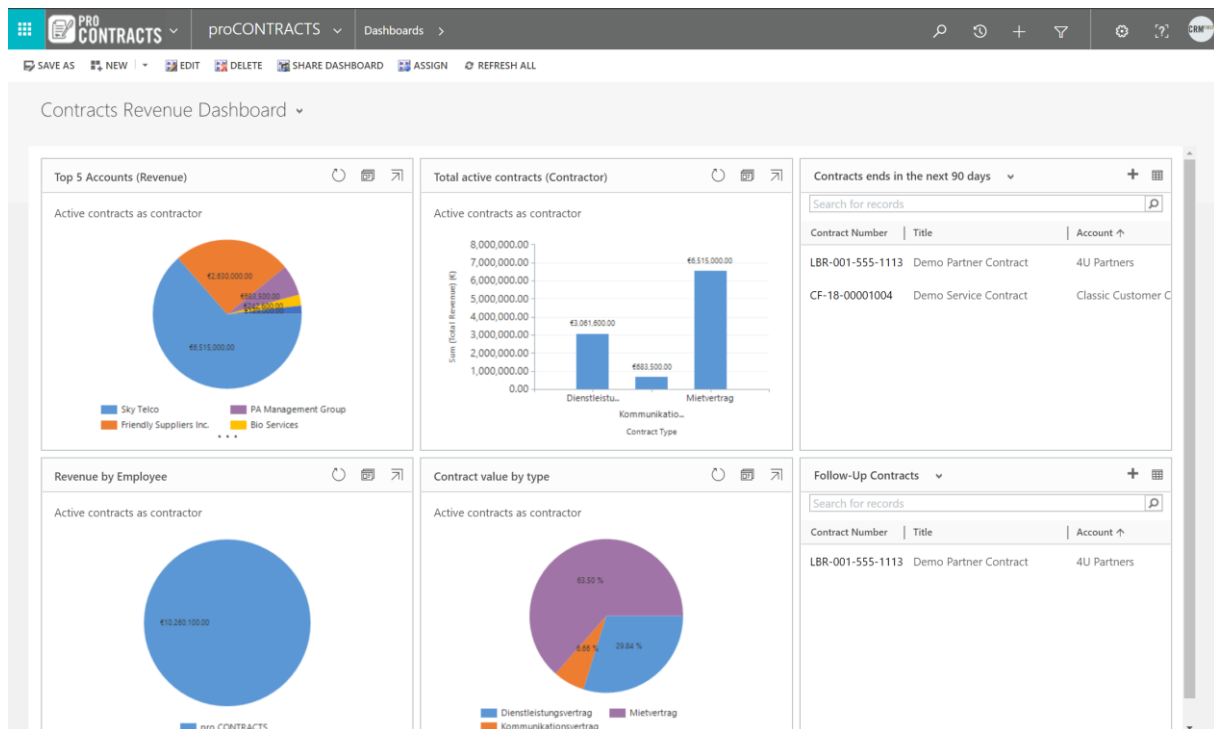
Contract Blocks
Upload word document templates, configure expiry periods & sequence number here

Contract Configurations
Create & define the contract type; can contain multiple blocks

Site Extensions
Multiple sites / locations feature; configure custom contract number prefixes for different branches

3. Dashboards

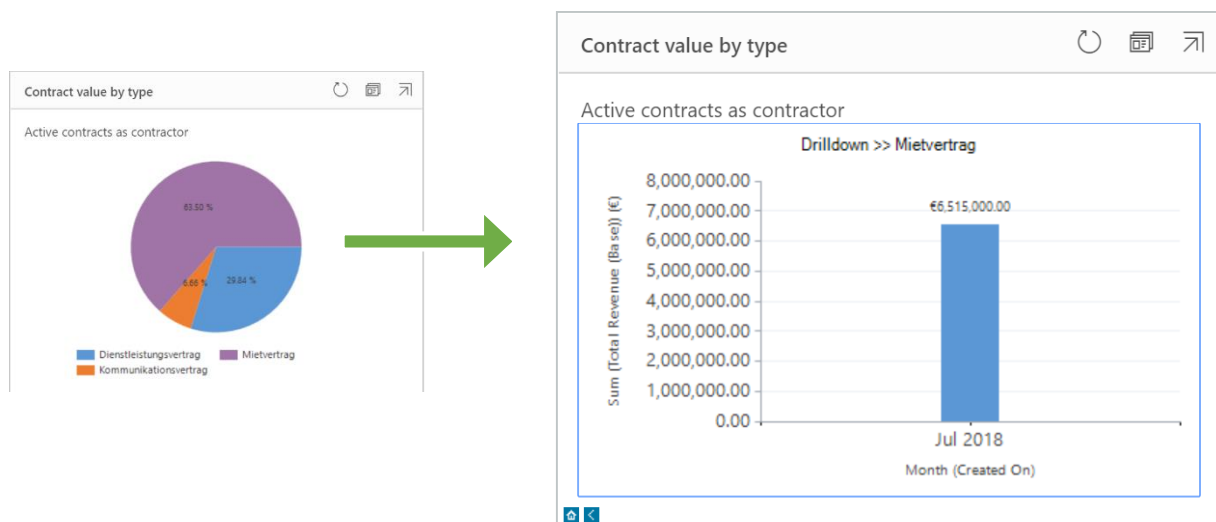
The Dashboard area is your personal overview of all relevant contract management information in one place; we have reloaded a view called “Contracts Revenue Dashboard” to highlight one of many ways this screen can be configured.



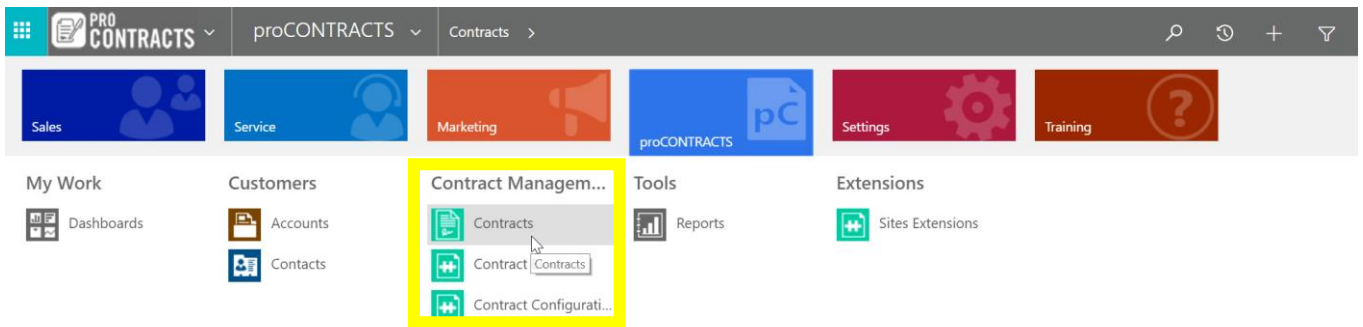
Starting from the top left hand side of the screen above, we can see the top 5 accounts currently loaded in the system, followed by total revenue value for active contracts and a reminder window in the top right corner for those contracts expiring in the next 90 days.

proTip When creating your first Contract in the step below, set an end date of less than 90 days & check back on your Dashboard to see changes.

Don't forget to explore the “drill down” function of each diagram; go further into the data by selecting different field criteria or change the graphical display options

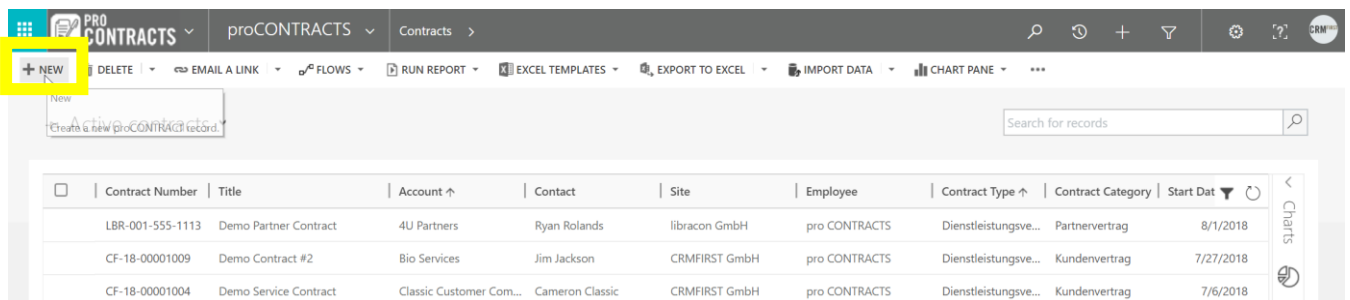


4. Creating a new Contract



To create a new contract in this Test Drive, we navigate to the “contracts” button highlighted above. Upon a new installation of proCONTRACTS, an initial process is required to load each contract type into the system. However, to make it quick and easy for your Test Drive experience, we have pre-loaded a basic contract type for demo purposes.

To open the new contract creation window, we need to hit the + button shown below;



proTip

The Contract Number can generate automatically depending on what type of contract you select; Try changing the type to “Supplier” (Lieferantenvertrag in German). This contract type will let you type in your own contract number to allow for smoother B2B interactions

Once the new button has been selected, you will then have a blank contract form load, where you can fill out all required information;

Note: all fields marked with a red asterisk are mandatory and must be filled before saving.

The screenshot shows the 'New proCONTRACT' form. The form is divided into several sections: General, Contract Dates, Contractual partner, Contract Status, Contract Dates, Deadlines, and Assistant/Activities/Notes. The 'General' section includes fields for Title, Contract Number, Contract Category, Contract Type, Parent Contract, and Contract Construct. The 'Contract Dates' section includes fields for Signed, Start Date, End Date, Initial End Date, and Termination Date. The 'Contractual partner' section includes fields for Account, Contact, Site, and Employee. The 'Contract Status' section includes fields for Status and Status sound. The 'Contract Dates' section includes fields for Signed, Start Date, End Date, Initial End Date, and Termination Date. The 'Deadlines' section includes fields for Termination Notice, Auto Renewal, Earliest Termination Date, Notice Date, and Renewal Date. The 'Assistant/Activities/Notes' section includes a table for Assistant, Activities, and Notes.

4.1 Generating your contract & navigating the contact form

Contract Document

Once created, the contract document attached to the form in the notes window

The screenshot displays the proCONTRACTS web application interface. At the top, there's a navigation bar with the proCONTRACTS logo and a breadcrumb trail: Contracts > Demo Service Contr... >. Below this is a toolbar with icons for actions like NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, EMAIL A LINK, TERMINATE CONTRACT, DUPLICATE CONTRACT, and RUN WORKFLOW. The main form is titled 'PROCONTRACT : MAIN FORM' and 'Demo Service Contract'. It is divided into several sections: 'General' (Title, Contract Number, Contract Category, Contract Type, Parent Contract, Contract Construct), 'Contract Dates' (Signed, Start Date, End Date, Initial End Date, Termination Date), 'Deadlines' (Termination Notice, Auto Renewal, Earliest Termination Date, Notice Date, Renewal Date), 'Contract Status' (Status, Statusgrund), 'Contract Details' (Revenue, Revenue Breakdown), and 'Financial Information'. On the right side, there are 'ACTIVITIES' and 'NOTES' sections. The 'NOTES' section contains a note about the document creation. At the bottom right, there's a 'Select Contract Blocks' section with a table showing 'SERVICES AGREEMENT' and 'Effective from' date. A yellow arrow points to the 'Create Contract' button.

Period	Monthly	Periodic Revenue	€2,000.00	One-time Revenue	€5,000.00
Revenue Breakdown	€9,000.00	+1	€0.00	+2	€0.00

Select Contract Blocks	Effective from
<input checked="" type="checkbox"/> SERVICES AGREEMENT	6/1/2018

Create Contract

General Info

Ranging from the Contract Title to the auto generated number & contract type.

Parent contracts can link contracts together in a hierarchy

Contract Status

Draft – allows modification
Ongoing – locks fields

Terminated – Closes Contract

Free text Agreement Sections

The Objects of Agreement and Individual Agreement boxes allow small modifications to the contract text.

This can be set up when building the merge fields in the Contract Template

Contract Blocks

All relevant contract blocks will be shown here. Select & deselect areas that you want to appear /remove from the document

Generate Contract Document

Select "Create Contract" to generate document

4.2. Generated contract documents

Once the “Create Contract” button has been selected, the final contract document will be stored on the top right notes section of the form. From here we can open the document with a simple click on the blue link as shown below;

The screenshot shows the PROCONTRACTS system interface. At the top, there's a navigation bar with buttons like NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, EMAIL A LINK, TERMINATE CONTRACT, DUPLICATE CONTRACT, and RUN WORKFLOW. Below this is a header section with a user profile, the title 'PROCONTRACT : MAIN FORM', and a dropdown menu. The main content area is divided into several sections: General, Contract Dates, Contractual partner, Deadlines, and a right-hand sidebar with ACTIVITIES and NOTES. The General section contains fields for Title, Contract Number, Contract Category, Contract Type, Parent Contract, and Contract Construct. The Contract Dates section includes Signed, Start Date, End Date, Initial End Date, and Termination Date. The Contractual partner section lists Account, Contact, Site, and Employee. The Deadlines section includes Termination Notice, Auto, Earliest Termination Date, Notice Date, and Renewal Date. The right-hand sidebar has a NOTES section with a note titled 'Demo Supplier Contract_V1' and a link to 'Demo Supplier Contract_V1.Docx'. A yellow arrow points from this link to the browser's address bar, which shows the URL for downloading the document.

Using the example contract shown above, the simple document that opens will look as follows;

The screenshot shows a sample service contract document generated by PROCONTRACTS. The document is titled 'Sample Service Contract (sample merge fields in RED)' and includes the contract number 'ZZ770340FJH' and the contract date '07.08.2018'. The document is structured as follows:

- Header: PROCONTRACTS logo and CRM FIRST logo.
- Title: Sample Service Contract (sample merge fields in RED)
- Contract Information: Contract Number: ZZ770340FJH, Contract Date: 07.08.2018
- Text: (hereinafter the "Contractor").
- Text: This SERVICE CONTRACT (this "Agreement" or this "Service Contract"), effective as of , is made and entered into by and between, a company organized and existing in
- Text: Whereas, Contractor and Customer desire to enter into a relationship in which Contractor will provide the following individual services:
- Text: Now, therefore, in consideration of the premises, and of the mutual promises and undertakings herein contained, the parties, intending to be legally bound, do hereby agree as follows:
- List of services:
 1. DETAILS:
 2. STATEMENT OF WORK
- Text: Contractor shall perform and deliver the Project as set forth in the Statement of Work issued against

5. Creating & Modifying Contract Blocks / Configurations

Each contract is composed of one or many “contract blocks”, which can be created in the window shown below. Due to the time restriction on this test drive, we have created a very basic merge field contract block and set it up as a simple “Services Agreement”

5.1. Services Agreement Contract Block

The screenshot shows the 'proCONTRACTS' application window. The main pane displays the 'SERVICES AGREEMENT' contract block configuration. The 'General' tab is active, showing fields for Name (SERVICES AGREEMENT), Sort Order (1), Type (Contract), Mandatory (Yes), Effective From (6/1/2018), and Effective To (12/31/2018). A 'NOTES' section is also visible. On the right, the 'Associated Contract Types' table shows one entry: 'Dienstleistungsvertrag' with Sort Order 1, Contract Block 'SERVICES AGREEMENT', Effective From 6/1/2018, Effective To 12/31/2018, and a 'Man...' column. A yellow arrow points from the 'Final Version' link in the notes to the next section.

5.2. Services Agreement – Demo Contract Word Document Template

The screenshot shows a Word document template for a 'Sample Service Contract'. The document is titled 'Sample Service Contract (sample merge fields in RED)'. It includes a 'Contract Number' field with a merge field '{ MERGEFIELD_DEMO * MERGEFORMAT }' and a 'Contract Date' field. The document text is as follows:

(hereinafter the “Contractor”).

This SERVICE CONTRACT (this “Agreement” or this “Service Contract”), effective as of { MERGEFIELD pcm_DEMO * MERGEFORMAT }, is made and entered into by and between, a company organized and existing in

Whereas, Contractor and Customer desire to enter into a relationship in which Contractor will provide the following individual services:

{ MERGEFIELD pcm_DEMO * MERGEFORMAT }

Now, therefore, in consideration of the premises, and of the mutual promises and undertakings herein contained, the parties, intending to be legally bound, do hereby agree as follows:

1. DETAILS:

2. STATEMENT OF WORK

Contractor shall perform and deliver the Project as set forth in the Statement of Work issued against and subject to the terms and conditions of this Agreement.

Your 24 hr proCONTRACTS Test Drive will now be coming to an end – for further information regarding proCONTRACTS or other solutions in our proX suite , please contact our team at CRMFIRST GmbH!