

Sage CRM Contract Manager

Gain full control over contract lifecycles with Sage CRM

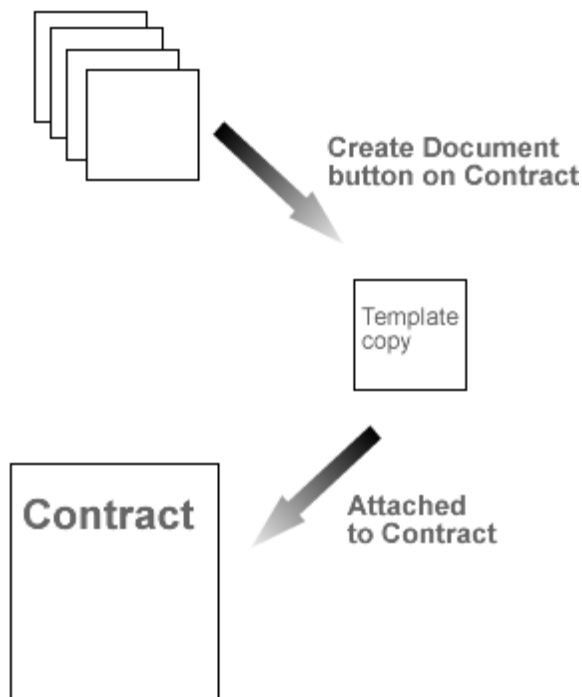
Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

CRM Contract Manager will enable you to optimise the lifetime value of your business relationships by centralising, standardising and systemising the entire contract lifecycle, from creation through expiration or renewal.

Document Management Functionality

The Document Management Facility provides the ability to create any number of customized documents based on your contract information, including contracts, deal letters, transmittal letters, summaries, abstracts, event letters, and much more. By using pre-drawn, pre-approved clause and term libraries, you can significantly reduce contract administration time.

Document Library



Screenshot of generated Contract Documents highlighting changed areas in Red.

2. Duration of the Agreement

This Agreement shall be valid for «cont_contractTerm» and is effective from «cont_startDate». The annual renewal date of the agreement is «cont_reviewDate» (the Renewal Date).

3. Purpose of the Agreement

By this Agreement the Contractor hereby agrees to provide the «cont_name» to the Client in accordance with Good Industrial Practice to any of the various locations as specified in the schedules, as directed by the Client from time to time.

4. Service Provision Fees

- 4.1 Annual Fee
- 4.1.1 Provisions are contract specific
- 4.1.2 Payment of Invoices are contract specific
- 4.2 Taxes
- 4.3 Value Added Tax
- 4.4 Withholding or Suspending Payment
- 4.4.1 Terms are contract specific
- 4.5.1 Audit of Annual Fee
- 4.5.2 The Subcontractor responsible for Contract for Fruit Services will provide both the Contractor and the Client with an annual written confirmation

5. Contract for «cont_name»

The Contractor agrees to provide the following services to the Client in accordance with the Client's Instructions and the Specifications

Specification of Goods/Services is contract specific

6. Force Majeure

6.1 If the Contractor is affected by Force Majeure in respect of the performance of its obligations under this Agreement, the Contractor will promptly notify the Client's contact in writing of the nature and extent of the events or circumstances giving rise to the Force Majeure. Notwithstanding any other provision of this Agreement, the Contractor shall not be deemed to be in breach of this Agreement or otherwise liable to the Client for any delay in the performance, or the non-performance of, any of its obligations under this Agreement save for any obligation of the Contractor to make any payment to the Client in accordance with the terms of this Agreement, to the extent that the delay or non-performance is due to any event of Force Majeure. The Contractor will use its best endeavours to make alternative arrangements with the prior consent of the Client as to avoid disruption to the service provision if affected by Force Majeure.

7. Contractor's General Obligations

7.1 Performance of the Services

7.1.1 The Contractor shall provide the «cont_name» to the Client with all due care, skill and diligence and in accordance with Good Industry Practice and agrees and undertakes to follow such directions in relation to the Contract Title as the Client may notify to the Purchaser from time to time.

7.1.2 The Contractor shall ensure that the Services shall comply in all respects with the provisions of this Agreement.

7.1.3 The Contractor shall provide the «cont_name» commencing on «cont_startDate» and ending on the termination of this Agreement (by whatever means).

7.2 Standards of Conduct

The Contractor undertakes to perform the Services and its obligations under this Agreement and exercise its rights under this Agreement in accordance with:

7.2.1 the terms and conditions of this Agreement;

7.2.2 the applicable Law and Necessary Consents;

7.2.3 the instructions, if any, provided by the Client in accordance with this Agreement.

7.3 The Contractor shall, maintain and comply with all Necessary Consents and all conditions of such Necessary Consents required for the Contractor, its Personnel and its permitted sub-contractors to perform the Services.

7.4 The Contractor shall provide all «cont_name» with suitable and trained personnel, who shall have the necessary equipment to perform the duties.

Employees of the Contractor or any authorised subcontractor must be well presented at all times. Full uniform must be worn at all times while serving out all «cont_name». The Client reserves the right to refuse any Employee of the Contractor or any subcontractor without specifying reasons.

7.5 The Contractor shall be responsible for the full and proper training of the Personnel to enable them to provide the «cont_name» in accordance with this Agreement and, without prejudice

7.6 Conduct

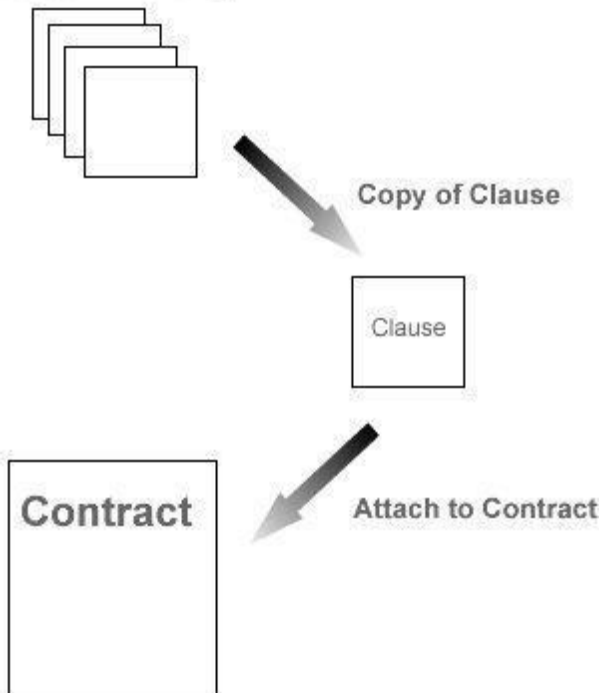
7.6.1 The Contractor shall at all times be responsible for (i) all XXX and (ii) maintaining XXX

7.6.2 The Contractor shall ensure that all Personnel, permitted subcontractors

Clause Library

The Clause Library contains preferred and approved alternate language clauses. The Clause Library can then be referenced when creating contract documents and clauses can be imported into the contract document you are generating.

Clause Library



Screenshot of a Clause Library. You can also add and modify new clauses, depending on workflows entered in the system

Sage CRM My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾

Find:


8 Clause, Page 1 of 1

Name	Note	Editable
Arbitration	All disputes, controversies, or claims arising out of or relating to this contract shall be submitted binding arbitration in accordance with the applicable rules of the American Arbitration Association then in effect.	<input checked="" type="checkbox"/>
Choice of Law and Forum	This agreement shall be interpreted under the laws of the State of California. Type : #cont_type# Any litigation under this agreement shall be resolved in the trial courts of Los Angeles County, State of California.	<input checked="" type="checkbox"/>
Indemnification Language	The subcontractor agrees to indemnify and hold harmless the contractor against loss or threatened loss or expense by reason of the liability or potential liability of the contractor for or arising out of any claims for damages.	<input checked="" type="checkbox"/>
Merger and Integration	This Agreement and the exhibits attached hereto contain the entire agreement of the parties with respect to the subject matter of this Agreement, and supersede all prior negotiations, agreements and understandings with respect thereto. This Agreement may...	<input checked="" type="checkbox"/>

Notifications and Alerts

By establishing rules for workflow processes, you can be assured that the proper approvals, notifications and alerts go into effect for every contract at precisely the right time and involve precisely the right people. Any lapse in a given workflow process is immediately flagged for resolution.

Screenshot of email notification sent. You can also receive notifications on screen or by SMS.

To:  Maryann Hortaliza
Cc:
Subject: Sage CRM contract available for review : Swift Project

Dear Sir/Madam

A new contract is ready on the Sage CRM contract management system for your approval

Please [click here](#) to go directly to the contract.

Regards

System Administrator
CRM Contract Manager

Notifications pop up from certain workflows entered into the system. For example: Flag all contracts that are up for renewal within 2 months

Repository - Contract Template Library

Any type of contract can be captured, managed, and analysed. Included in the product is an audit trail which records each contract revision, the person who made the change, and each time the contract was printed, faxed, or emailed.

Screenshot of list of contracts.

5 Contracts, Page 1 of 1

User	Name	Contract Type	Contract Status	Contract Value (EUR)	Company
System Administrator	Klossy Project	Contract	Draft 1 Manager Approved	23,000.00	3G Homes
System Administrator	Swift Project	Contract	Draft 1 Manager Approved	13,000.00	Kelly National
System Administrator	Enbu Consulting Project	Terms and Conditions	With Supplier For Signing	10,000.00	Eastern Marketing
System Administrator	Webquest Project	Addendum	Draft 1 Supplier Approved	3,000.00	Kenny Group Ltd.
System Administrator	Greg's Project	Contract	Complete	38,000.00	P Nedlloyd Ltd


Contract Viewer

The Contract Viewer allows real time access to key contract data. All information is available on line via the web interface and searchable by user-defined keywords.

Security & Permissions

CRM Contract Manager provides a robust, enterprise-ready security model.

Screenshot of sample of security profile.

 Administration -> Users -> Users -> System Administrator

User Details | User Preferences | **Security** | User Activity History

User rights Continue

System Administrator Help

Profile: Unrestricted Profile

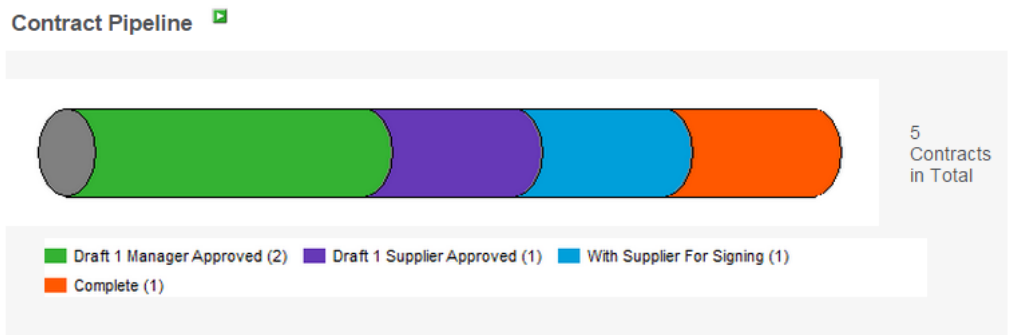
	Cases	Clause	Communication	Company	Contract	Lead	Opportunity	Person
Assigned To	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	View/Edit/Del
Team	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	View/Edit/Del
Created By	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	View/Edit/Del
User's home territory	View/Edit/Ins/Del	No access	View/Edit/Ins/Del	View/Edit/Ins/Del	No access	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del
Worldwide	No access	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del	View/Edit/Ins/Del
Marketing	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	No access	View/Edit/Del	View/Edit/Del	View/Edit/Del

Personal and Team Dashboards for your contracts

The dashboard provides a convenient launch point for all of your favourite activities within the system, and automatically displays the information that needs to be in the centre of your radar each day. Each user can have their own individual dashboard, or you can have a team dashboard, you can display contract status, open tasks, searching, and reports (spending patterns, expiry dates etc...).

The dashboard can also include a calendar and individual alerts for expiring contracts and task deadlines.

Screenshot of Contract Pipeline.



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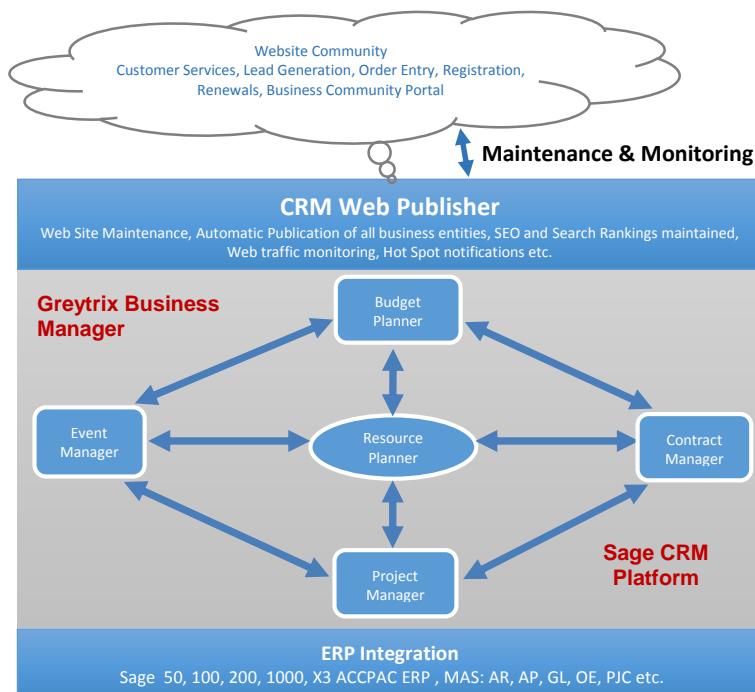
Report Function

Using the Reports Function, any number of custom reports can be created such as: status reports, financial commitments, deliverable commitments. Export options include: Word, PDF, HTML, rich text, plain text, or Excel. Reports can also be generated for one contract or a group of contracts derived from the search feature or from all contracts – and always within the security rights defined for the user. All information in the reports can be configured to use contract terminology that a business user easily identifies with.

Integration and Customisation

Like all our products for Sage CRM, Contract Manager is completely customisable and can be configured to suit the needs of the business.

Greytrix Business Manager



CRM Contract Manager is one of 5 products that make up the **Greytrix Business Manager** Suite.

For more information on Greytrix Products and Services, write to us at crmproducts@greytrix.com
Website: www.greytrix.com | Blog: <http://www.greytrix.com/blogs/sagecrm/>