

CONTRACT MANAGEMENT SOFTWARE ON DYNAMICS 365

EXTENDED PROFILE





SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Contract Management Software on Dynamics 365
SOFTWARE FEATURES	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✗
FUNNEL REPORTING	✗
INTEGRATIONS	✗
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✗
PIPELINE MANAGEMENT	✗
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗
TASK ASSIGNMENT	✗
TERRITORY/QUOTA MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✗

MEDIUM (51-200 USERS)	×
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	×
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	×
MOBILE FEATURES	
IOS APP	×
ANDROID APP	✓
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	×
FURTHER INFORMATION	



SOFTWARE SCREENSHOTS

Dynamics 365 Finance and Operations USMF

Expand all Collapse all

- Common
 - Projects
 - All projects
 - My projects
 - Contractors
 - All contractors
 - Contractors on hold
 - Contractors past due
 - Contract orders
 - All contract order
 - Submittals
 - All submittals
 - Internal submittals
 - Customer submittals
 - Inspection details
 - All inspection details
 - Customer inspection details
 - Work completion
 - All work completion
 - Dispute details
 - All dispute details
 - Contractor dispute
- Internal dispute
 - Customer dispute
- Change orders
 - All change orders
- Contract invoices
 - Contract invoice proposal
- Inquiries
 - Inspection details
 - Submittal details
 - Work completion details
 - Budget revised contract order list
- Setup
 - Contract management system parameters
 - Contract management system workflows
 - Contract employee type
 - Documents
- Sites
 - Site types
 - Site condition type
 - Site details
- Services
 - Service type

- Dispute details
 - Dispute type
 - Dispute reason
 - Dispute process
- Submittal
 - Submittal group
 - Submittal type
 - Submittal subtype
 - Submittal status
 - Submittal process
- Inspection details
 - Request for inspection process
 - RFI status
 - Inspection types
 - Defects
- Change order
 - Change order Reason
- Work completion
 - Subwork type
 - Majorwork type
 - Number seq load all
- Reports
 - Contract order

- Contractor details
 - Contract order by contractor
 - Contract order by project
- Dispute
 - Customer wise dispute
 - Project wise dispute
- Work completion
 - Work completion by worktype
 - Work completion against submittal
 - Work completion details by work subtype
- Inspection details
 - Inspection by contractor
 - Inspection by project
 - Inspection by contract order
 - Inspection by work completion
- Submittal
 - Submittal by contractor
 - Submittal by project
 - Submittal by customer
 - Submittal by contract order
 - Submittal by status

Activate W
Go to Settings

Finance and Operations | Contract management | Common | Contract orders | All contract order

CONTRACT ORDER PLAN MANAGE INVOICE GENERAL OPTIONS

USMF-000010 : 1001 - Acme Office Supplies

Contract order header

DELIVERY: Delivery date 4/1/2022

VENDOR: Contract

PRODUCT/ORDER CREATION: Auto created No

Default project category ID

Requested transaction status: Disallow transaction

Contract: Disallow transaction

DISCOUNTS: Total discount % 0.00

CONTRACT ORDER SETUP: Default service item ID S0001

Contract order lines

Finance and Operations | Contract management

Options | Contract order | Analytics

Contract management

Summary

- All contracts: 23
- Active contracts: 10
- Expiring vendor document: 0
- Active contract value: 311,584,000.00
- In progress: 5
- Contracts on hold: 1
- Expiring contracts: 0
- Expired contracts: 5

Contracts

Contract	Title	Vendor account	Project ID
CONTRACT-00001	Earth work contract	SUP-006	PRJ-001
CONTRACT-00002	Electrical and decorating	PV001	PRJ-001
CONTRACT-00003	Load testing contract	CN-001	PRJ-002
CONTRACT-00004	Superstructure construction	SUP-006	PRJ-002
CONTRACT-00005	Building construction contract	101010	PRJ-001
CONTRACT-00006	Electrical and decorating	1001	PRJ-001
CONTRACT-00007	Construction contract	1002	PRJ-003
CONTRACT-00008	Apartment construction	1001	
CONTRACT-00009	Earth work contract	1002	
CONTRACT-00010	Electrical and decorating	PV001	

Finance and Operations | Contract management

Options | Contract order | Analytics

Contract management

Summary

- All contracts: 91
- Open contract orders: 19
- Due invoices: 120,050.00
- Cancelled orders: 0
- All submittals: 23
- Total committed cost: 1,130,000.00
- Involved value: 1,130,000.00

Contract management

Contract order	Contract type	Project ID	Vendor account	Need
CORD-00002	Material & Labor	PRJ-001	SUP-006	Bas
CORD-00003	Material & Labor	PRJ-001	PV001	Al G
CORD-00004	Material & Labor	PRJ-002	1001	Acn
CORD-00005	Material & Labor	PRJ-002	1001	Acn
CORD-00006	Material & Labor	PRJ-001	1001	Acn
CORD-00010	Material & Labor	PRJ-003	1002	Land
CORD-00011	Material & Labor	PRJ-003	1002	Land
CORD-00016	Material & Labor	PRJ-007	1003	Ade
CORD-00020	Material & Labor	PI001	1001	Acn
CORD-00021	Material & Labor	PI001	1002	Land

Finance and Operations | Contract management | Common | Contracts | All contracts

Contract details

Standard view

Contract	Title	Vendor account	Project ID	Effective date	End date	Contract value	Contract status
CONTRACT-00001	Earth work contract	SUP-006	PRJ-001	1/4/2022	11/22/2022	3,250,000.00	Expired
CONTRACT-00002	Electrical and decorating	PV001	PRJ-001	3/15/2023	6/30/2023	2,650,000.00	On hold
CONTRACT-00003	Load testing contract	CN-001	PRJ-002	4/1/2020	5/11/2021	500,000.00	Draft
CONTRACT-00004	Superstructure construction	SUP-006	PRJ-002	4/1/2022	12/1/2022	7,750,000.00	Cancelled
CONTRACT-00005	Building construction contract	101010	PRJ-001	1/4/2020	5/08/2020	156,810,850.00	Cancelled
CONTRACT-00006	Electrical and decorating	1001	PRJ-001	3/10/2020	5/08/2020	7,650,000.00	Expired
CONTRACT-00007	Construction contract	1002	PRJ-003	4/8/2019	9/10/2022	17,500,000.00	Expired
CONTRACT-00008	Apartment construction	1001		6/4/2018	2/19/2021	38,650,000.00	Expired
CONTRACT-00009	Earth work contract	1002		8/4/2020	11/26/2022	45,780,000.00	Active
CONTRACT-00010	Electrical and decorating	PV001		11/16/2019	5/27/2021	6,500,000.00	Active