MICRO APPS

Contract Management App

Installation:

To install the Contract Management app, you simply navigate to the Microsoft Marketplace for Business Central apps (AppSource) via your own Business Central environment. From here you can automatically install the extension and make it available within every company in your Business Central environment.

For the correct working of the app, make sure that the setting for the Micro Apps Base App is set to "allowing HttpClient Request".

General use:

The contract management app works based of Sales Quotes. The means that contracts may be created based of a sales quote or that the contract may be created from scratch.

App Setup:

Once the installation is complete, the app needs to be set up. This can be done with the <u>Contract Management Wizard</u>. This wizard contains all the necessary steps to completely set up the extension. The first step is to register yourself and to activate the trial or subscription. With the trial, you can use the app two weeks free of charge. After the trial period, you need to activate the subscription. Make sure both fields are checked (like the example in the right picture.)
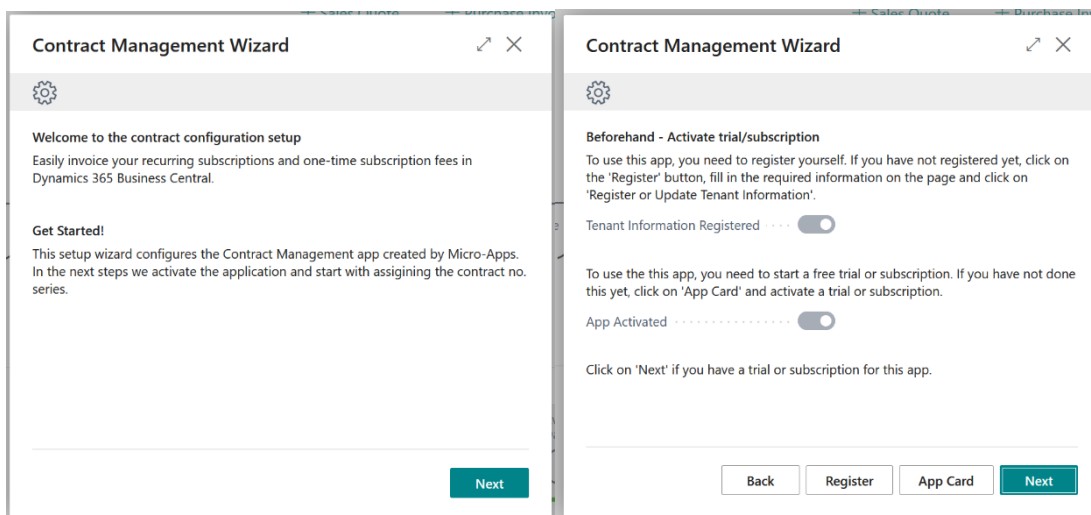
In the next step, you need to assign the number series for contracts. Select or create a new number series for this contract application.
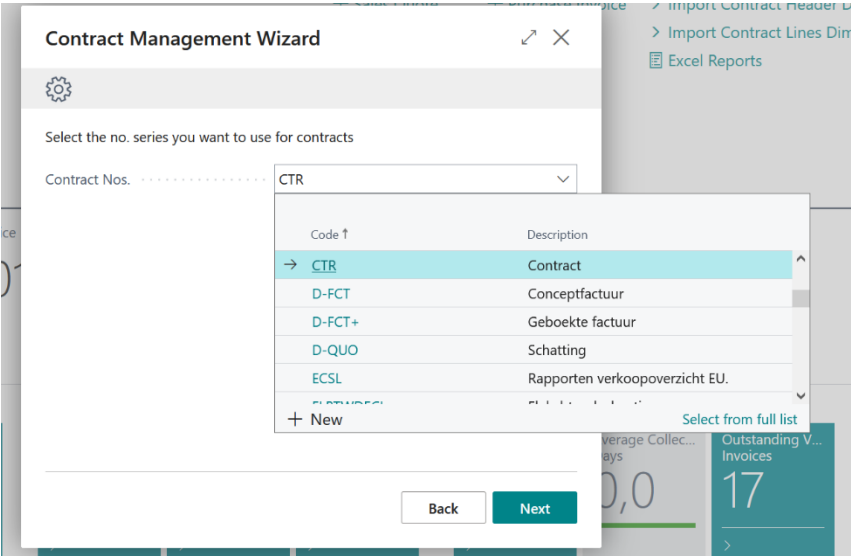
If you want to automatically add dimensions for a contract, select or create a default dimension value for your contracts. This field is optional. If you leave the field blank, no extra dimension is created.
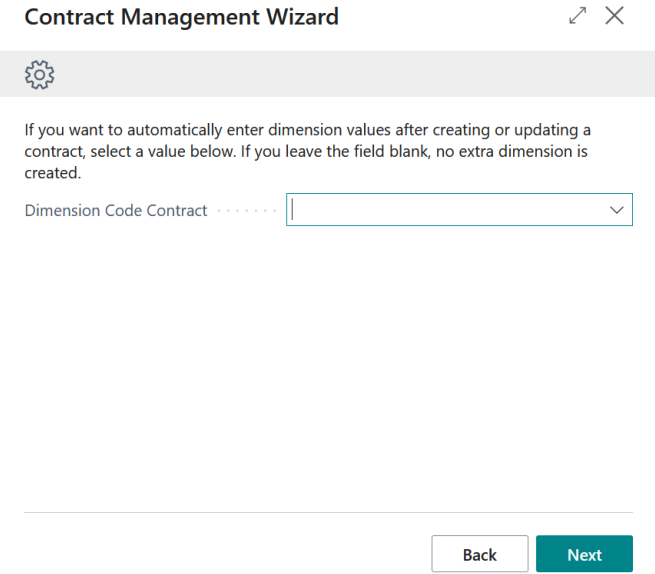
If you want to automatically create invoices for the contracts you can create a job queue via the button on the next step. The fields need to be filled in to use the job queue. The fields specify when the invoices will be created, and what the next date will be to create the invoices. Only invoices will be created if the next invoicing period of the contract is before or on the "Create Invoices Till" date.

The last step contains assigning the contracts permission set. For every user that uses the contracts app and doesn't have super rights, you need to set the contracts permission. Open the user overview page with the button, select the user and assign the "Contracts" permission in the User Permission Sets tab. After this step you are done with the configuration.

Converting a sales quote

To convert a sales quote to a contract you can simply create a sales quote as usual. Remember that all the lines on the sales quote will be converted onto the contract. Perform the following steps, once the sales quote is completed. Navigate to **Process** in the ribbon and click on the **Make Contract** button.

Contracts – List View

The contract page can be found by using the keyword **Contracts**, this will bring you to the list view of the contracts. The list is by default filtered on the column *Status* and only displays *active* contracts, to display *inactive* contracts you may need to change the filter.

Contracts – Card View

Before a contract can be invoice additional fields need to be filled in on the contract card. The fields provide additional information regarding the duration, latest invoiced period and frequency of invoicing.

Frequency: The frequency in which the contract will be invoiced to the customer

Last invoice created: Displays the date on which the last invoice was created, this field will does not need to be filled in by the user.

Next invoice creation date: Displays the date of when the next invoice will need to be created. This field only needs to be filled in, in the case this is needs to be manually adjusted.

Cont.-invoice begin date: Describes the date of the next invoicing period, the end date is determined by the begin date plus the frequency.

Contract period starting date: The actual starting date of the contract, that has been agreed by the customer.

Contract period ending date: The actual ending date of the contract that has been agreed by the customer.

Contract – Invoicing

Invoicing one or multiple contracts may be done in the following two ways. The first option is to invoice an contract directly from a contract card. In the top left corner the button **Invoicing…** will be visible.

Before an invoice is created, a check is performed if the next invoicing period is within the contracting period. If this is the case Business Central will create the invoice, if not the invoice will not be created.

Furthermore, when contract is invoice, the user is able to set additional filter and combine multiple contracts into one invoice.

Besides being able to invoice a contract directly from the contract card, the user may also invoice directly from the Business Central home screen by searching for **Create Contract Invoices.** Here the same filters may be set.

During the invoicing process standard Sales Invoices will be created. The invoice lines will depict the relevant contract no.'s and invoicing period of the contract.