

# Contract Management



## Microsoft Dynamics™ SL

### BENEFITS

- **Effectively manage subcontract agreements**  
Create and track agreements from the pending stage through commitment, then manage subcontractor performance by linking payments to the achievement of contractual commitments, including on-time document submittals.
- **Boost productivity**  
Increase the profitability of project work and change orders by reviewing budgets, margin, and schedule impacts before work proceeds or changes are approved.
- **Streamline change order approval and tracking**  
View, track, and approve change orders easily to help eliminate delays, reduce the risk of miscommunication or unauthorized work, and more quickly turn change orders into billable tasks.
- **Take control of documentation**  
Keep on top of compliance documents, drawings, permits, proof of insurance submittals, performance bonds, and other important documents to help prevent lost, late, incomplete, or missing paperwork including tailoring of payment controls for subcontractors based on their insurance policy expirations.
- **Stay on schedule with automated alerts**  
Receive prompts about unapproved change orders and pending deadlines for document submittals.

**Streamline time-consuming contract management tasks and increase the productivity of subcontractor interactions for even the most complex projects. By improving control over change orders, document tracking, and subcontractor disbursements, you can help ensure timely completion, enhance cash flow, and boost project profitability.**

Contract Maintenance (CN.CON.00)

Contract: CO-123 Desc: Business Process Re-engineer

Customer/Owner: C315 The Phone Company

Contract Manager: E01261 Stuart Munson-PM

Accountant: E01218 Susan Metters-Admin

Cust Reference:

Type of Contract: Contract Terms: Due in 30 Days Status: Active

Scope/Description of work:  Owner Change Notice Req'd Nbr of Days: 0

Business process re-engineering, turnaround consulting, and sales & marketing audit are all under this contract. Each is run as a separate project.

| Original Value | Apprv Chg Orders | Revised Value | Pending Chg Orders | Total |
|----------------|------------------|---------------|--------------------|-------|
| 0.00           | 0.00             | 0.00          | 0.00               | 0.00  |

Contact Addr... Additional Info... Contract Projects... History Text...

*Manage Contract documents, change orders, and disbursements to optimize project cash flow and profitability.*

Subcontract Maintenance (CN.SUB.00)

Project: CO-123000 Business Re-engineering

Contract: CO-123

Subcontract Line Index: Dates Additional Info

Subcontract: 000001 Description: Custom Training for Management

Vendor ID: V00152 Adventure Works

Subcontract Type: Consultant Terms: 05 Speciality: General Consultant

Pay Status: OK to Pay Reason:

Subcontract Status: In Process Company: 0060 Contoso, Ltd

Customer/Owner: The Phone Company

Scope/Description of work: Denise Smith of Adventure Works will put on a custom training program for Senior Management of TPC to help in turnaround effort. Seminars will be presented every other week for a 3 month period until all senior staff have been trained

| Original Value | Apprv Chg Orders | Revised Value | Pending Chg Orders | Total    |
|----------------|------------------|---------------|--------------------|----------|
| 35000.00       | 0.00             | 35000.00      | 0.00               | 35000.00 |

Contact Change Orders... Submittals... Joint Pay... History Text...

INS 0060 SYSADMIN 1/12/2007

*Control subcontractor payments, lien waivers, and pay-when-paid subcontracts.*

## FEATURES

## BENEFITS

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### Convenient Contract Management

Easily record pending agreements to monitor progress throughout bidding and negotiation processes and track commitments.

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### Flexible Change Order Processing

Create, analyze, approve, and track change orders by line item or by the original budget to meet your business requirements.

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### Tight Fiscal Control

Help prevent charges against unapproved change orders, and link cash disbursements to performance milestones, pay-when-paid triggers, and timely document submittals.

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### Streamlined Disbursement Administration

Link processes and information with accounting systems to manage and automate subcontractor payments subject to retention percentages, obligations, or entitlements.

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### Convenient Transmittal Tracking

Record the status and location of important contract and subcontract documents throughout submittal, review, approval, and information-sharing processes. Quickly sort and view outstanding documents.

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### Automated Alerts

Receive advance warning, sent via Microsoft Dynamics SL Communicator, when unapproved change orders age or when paperwork is due to or from subcontractors, government agencies, or other project participants.

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### Flexible Recordkeeping

Capture and easily access important contract-related data such as insurance and worker's compensation expiration dates, draw requests, and retention percentages.

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### Data Integration

Help eliminate redundant data entry and ensure accurate accounts with full integration across Microsoft Dynamics SL, including financial management, payroll, field service management, and distribution modules.

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For more information about Microsoft Dynamics™ SL, visit: [www.synergybusiness.com](http://www.synergybusiness.com) or call 800.481.8590

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