

Contract Manager

Agenda

- Introduction
- What is Contract Manager?
- Areas of use
- Using Contract Manager
 - How to customize / design the app
 - How to set up new contracts
 - How to filter and search for contracts
- Pricing
- Questions and Answers



Viktor Olmin

Head of Sales

What is Contract Manager?

- Tool to create and manage time sensitive processes in SuperOffice
- Current / past / future processes
- Generate activities in calendar for follow ups
- Creates a container to store all information regarding this process:
 - Sales
 - Documents
 - Start / End date
 - Statuses

Areas of use

- Sales Contracts
- Competitor Contracts
- Procurement / Purchasing
- GDPR
- NDA / SLA
- Public Procurement
- Follow up terminated contracts
- Any type of business activity set to renew

How to customize Contract Manager

Configuration

- List items
- Extra fields
- Users
- Import
- About

Contract Types Add new

Name	Actions
Competitor	Edit 🗑️
Subscription	Edit 🗑️
Services	Edit 🗑️
NDA	Edit 🗑️

Contract Statuses Add new

Name	Actions
Ongoing	Edit 🗑️
Terminated	Edit 🗑️

Configuration

- List items
- Extra fields**
- Users
- Import
- About

Extra fields

Use drag and drop in the first column to change the order of the fields.

Field order	Name	Type	Actions
1	Product	Text	Edit Delete
2	Volume	Number	Edit Delete
3	SLA	Checkbox	Edit Delete

[Add new](#)

Configuration

List items

Extra fields

Users

Import

About

Select the checkbox for the users that should access the application.

You are currently using 9 out of 13 available licenses.

[Purchase more licenses](#)

[Save](#)

Show 10 entries

Search:

App Access	Name	Login name	Group	SuperOffice license
<input checked="" type="checkbox"/>	Pär Pettersson	PP	Administration	Complete CRM User
<input checked="" type="checkbox"/>	Fredrik Bailey	FredrikB	Konsult	Complete CRM User
<input checked="" type="checkbox"/>	Andreas Bergstrand	andreas.bergstrand@i-centrum.se	Konsult	Sales User
<input checked="" type="checkbox"/>	Maria Ögren	maria.ogren@i-centrum.se	Konsult	Complete CRM User
<input checked="" type="checkbox"/>	Viktor Olmin	ViktorO	Salesteam	Sales User
<input checked="" type="checkbox"/>	Atheer Fendi	atheer.fendi@i-centrum.se	Marknad	Complete CRM User

Configuration



List items



Extra fields



Users



Import



About

Import existing contract data

1. Download the import template [here](#).
2. Add contract data.
3. Upload the file in the input below.
4. Click "Import".

Import

How to create a Contract

Contract Manager Webpanel – Company Card



 i-centrum ab , STOCKHOLM [New contract](#) 

Show contracts Search:

Title	Type	Status	Responsible	Sale	Contact	Contract Start	Contract End	Actions
No contracts exist for this customer								

Showing 0 to 0 of 0 contracts [Previous](#) [Next](#)

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Create new contract

Title

Responsible

Company

Type

Competitor
Subscription
Services
NDA

CUSTO

Contact

Sales

INFORMATION

Price

Payment period

Description

Special Terms



Edit contract

Title

Type

Responsible

Status

CUSTOMER

Company

Contact

Sales

INFORMATION

Price

Payment period

Description

Special Terms

Contract Manager – Creating a New Contract



Description

Special Terms

Start Date

End Date

Period (Months)

Notice (Months)

Extension Period (Months)

Reminders ⓘ

EXTRA FIELDS

Product

Volume

SLA

Contract Manager – Creating a New Contract



Reminders ⓘ

- 1 week ×
- 1 month ×

EXTRA FIELDS

Product

Contract Manager

Volume

50

- SLA
- AutoCad - product
- Savoir - product

DOCUMENTS

Upload document OR **Select existing document**

Choose Files No file chosen

Select document ▼

Documents

-  [GetAccept - Signed document Contract Manager for i-Centrum Contract document](#)

- Save**
- Delete

Contract Manager Webpanel – Company Card



 i-centrum ab , STOCKHOLM [New contract](#) 

Show contracts

Search:

	Title	Type	Status	Responsible	Sale	Contact	Contract Start	Contract End	Actions
>	Contract Manager for i-Centrum	Subscription	Ongoing	Viktor Olmin	Contract Manager for i-Centrum AB	Per Pettersson	2021-01-12	2022-01-11	Edit

Showing 1 to 1 of 1 contracts

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Contract Manager Webpanel – Company Card




i-centrum ab , STOCKHOLM
New contract
⚙️

Show contracts

Search:

	Title	Type	Status	Responsible	Sale	Contact	Contract Start	Contract End	Actions
▼	Contract Manager for i-Centrum	Subscription	Ongoing	Viktor Olmin	Contract Manager for i-Centrum AB	Per Pettersson	2021-01-12	2022-01-13	Edit

Price: 20000	Description	Special terms	Documents	Reminders
Payment Period: Year		On-boarding provided free of charge	<ul style="list-style-type: none"> GetAccept - Signed document Contract Manager for i-Centrum 	<ul style="list-style-type: none"> 1 week 1 month
Period (Months): 12				
Notice (Months): 3				
Extension (Months): 12				

EXTRA FIELDS

Product	Volume	SLA	AutoCad - product
Contract Manager	50	Yes	No
Savoir - product			
No			

Contract Manager – Automatically Generated Reminders



Company More Interests Note www



Visiting: Norrtullsgatan 6
113 29 Stockholm

Postal: Norrtullsgatan 6
113 29 Stockholm
Sverige

Phone: +46 725222532

Fax:

Web site:

Sales responsible: **Filip Vanthöm**

Category: **Samarbetspartner**

Code: ICENTRUMA

Number: 10392

Org.nr:

Business: IT/Telecom

Main contact: Per Pettersson

Kunddel (B):

Stop No Mailings

2020-09-11 FilipV

← → Task Edit

Contacts Activities Relations Projects Sales Requests GetAccept Company Map4You Company Link Card - Bisnode Busine... Konkurrent avtal Contracts Map4You Pro Company Kund kvalificering Folders

✓		Date ↓	Type	Text	Contact	Project name	Us...
<input type="checkbox"/>		2021-02-23	Contract Reminder	It is 1 week left until contract end date for contract "Contract Manager for i-Centrum"	Per Pettersson		Vikt...
<input type="checkbox"/>		2021-02-02	Contract Reminder	It is 1 month left until contract end date for contract "Contract Manager for i-Centrum"	Per Pettersson		Vikt...

How to filter and search for contracts

Contract Manager Selection



Filter options

Company Filter Company	Contact Filter Contact	Sale Filter Sale	Contract Start From [Calendar icon]	Contract Start To [Calendar icon]
Type Filter Type	Status Filter Status	Responsible Filter Responsible	Contract End From [Calendar icon]	Contract End To [Calendar icon]
Period (Months) = Period	Extension Period (Months) = Extension Period	Notice (Months) = Notice	Price = Notice	Payment Period Filter Payment Period
Volume = Volume	SLA Filter SLA	AutoCad - product Filter AutoCad - product	Savoir - product Filter Savoir - product	

✕ Clear all filters **↻ Reload contracts**

Contract Manager Selection



Contract End From

Contract End To

Filter options

Company <input type="text" value="Filter Company"/>	Contact <input type="text" value="Filter Contact"/>	Sale <input type="text" value="Filter Sale"/>	Contract Start From <input type="text" value=""/>	Contract Start To <input type="text" value=""/>	
Type <input type="text" value="Subscription"/>	Status <input type="text" value="Filter Status"/>	Responsible <input type="text" value="Filter Responsible"/>	Contract End From <input type="text" value="2022-01-01"/>		Contract End To <input type="text" value="2022-01-31"/>
Period (Months) <input type="text" value="12"/>	Extension Period (Months) <input type="text" value="Extension Period"/>	Notice (Months) <input type="text" value="3"/>	Price <input type="text" value="Notice"/>	Payment Period <input type="text" value="Filter Payment Period"/>	
Volume <input type="text" value="Volume"/>	SLA <input type="text" value="Filter SLA"/>	AutoCad - product <input type="text" value="Filter AutoCad - product"/>	Savoir - product <input type="text" value="Filter Savoir - product"/>		

Period (Months)

Extension Period (Months)

Notice (Months)

Contract Web Panel on Company or Sale Card



FILTER RESULT

Show 10 contracts [Export to excel](#) [Select visible columns](#)

Search:

Title	Company	Type	Status	Sale	Contact	Responsible	Contract Start	Contract End	Period (Months)	Extension Period (Months)	Notice (Months)	Price	Payment Period	Description	Special Terms	Actions
Avtal - Salesboard	Superoffice Sweden AB, GÖTEBORG	Subscription	Ongoing		Kjell Svensson	Filip Vanthöm	2021-01-01	2022-01-01	12	12	3	2000	Year	Avtall om Salesboard för SuperOffice, här skriver jag lite text om avtalet...	60 dagar betalningsvillkor. Free trial i 45 dagar..	Edit
Contract Manager for i-Centrum	i-centrum ab , STOCKHOLM	Subscription	Ongoing	Contract Manager for i-Centrum AB	Per Petterson	Viktor Olmin	2021-01-12	2022-01-13	12	12	3	20000	Year		On-boarding provided free of charge	Edit

Showing 1 to 2 of 2 contracts (filtered from 19 total contracts)

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Showing 1 to 2 of 2 contracts (filtered from 19 total contracts)

Pricing

- Tiered Pricing Structure

<u>Users</u>	<u>Cost/User</u>	<u>Total Cost/Month</u>
• 1 users:	€5	€5
• 10 users:	€4.5	€45
• 20 users:	€4	€80
• 50 users:	€3.5	€175
• 100 users:	€3	€300
• 200+ users:	€2.25	€450
• Site license:		€600

Questions & Answers

support@i-centrum.se