

# Contract Management Automation

Powered by Power Apps



# Overview

- Withum specializes in building business solutions using the Microsoft Power Platform. Our Contract Management Solution is built on the Power Platform and provides small and medium sized firms with the ability to effectively manage the entire life-cycle of your contracts and other important agreements.
- This solution allows you to manage your important business agreements without investing in an expensive, and complicated, contract management solution. It can be tailored to specifically meet your requirements and conform to your unique businesses processes using the latest features of the Power Platform.

# Addressing Pain Points

- Many small to medium sized firms and organizations receive and produce/receive large volumes of contracts and other important legal documents.
- Contracts, NDAs, SOWs, and other agreements flow in and out with little automation and oversight.
- Traditional Contract Management solutions are expensive and provide far more functionality than you may need or want.



# Withum Provides...

- A purpose-built, role-based tool to create, manage, track, and archive your critical business contracts using Microsoft Power Apps
- A proven methodology of improving contract management and accelerating launch and adoption of the solution

## ENVISION

- Analyze current contract management processes and tools.
- Facilitate cross-functional discussions to document ideal future state.
- Evaluate organizational readiness to govern the Power Platform.
- Plan an implementation roadmap and establish success metrics.

## ENACT

- Build SharePoint lists or Dataverse tables to store contract data.
- Create a Microsoft Team and build associated SharePoint resources to host documents.
- Create PowerApps forms and dashboards.
- Configure workflows in Power Automate to automate key tasks.

## EMPOWER

- Advise on data and document migration into the new system.
- Review administration options and configurations.
- Monthly KPI success and Power Platform health review.
- Gather continuous improvements and identify additional customizations.



# Visibility into Every Stage of the Contract Lifecycle

## Submit and track contracts with ease

- Simplify the contract request process with intuitive, intelligent forms.
- Empower employees to monitor contract performance and manage to budget.
- Reveal opportunities to reuse vendors and contractors across projects for cost savings

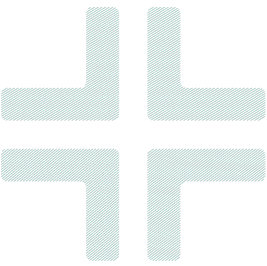
## Mine data to drive better decisions

- Surface the data that matters to each department in customized dashboards.
- Track workflow status with intuitive visual elements to find and fix process bottlenecks.
- Govern access, retention, and versioning of documents and data at every stage.

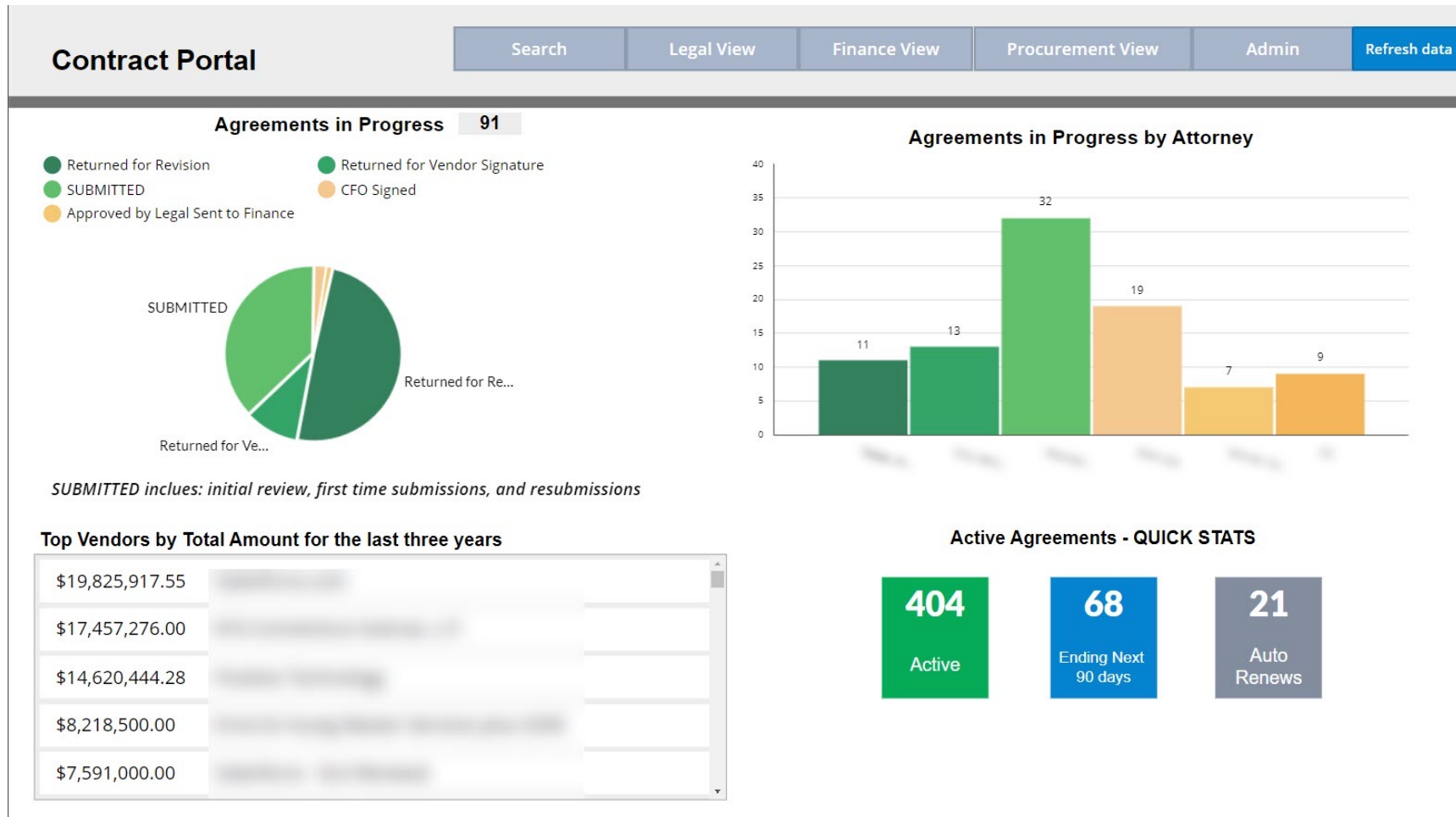
## Automate for accountability

- Meet critical deadlines with fully customized automated notifications and reminders in Teams or email.
- Assure compliance by using AI to apply sensitivity labels to key documents.
- Extract data from documents to speed processing.

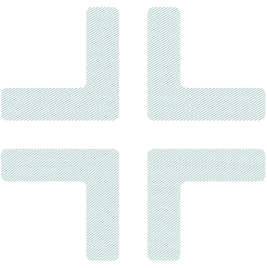
# Solution Overview



✓ At-a-Glance Overview of Contracts in Progress and Completed for Administrators



# Solution Overview



✓ Single-Pane of Glass for your Attorneys to Manage their Inputs and Approvals

**Contract Portal** Search Legal View Finance View Procurement View Admin Refresh data

Binder	Vendor Name	Review Status	Attorney	Contract Type	Department	Business Lead	Submitter	Submission Amt
5948 <i>New contract</i>		Returned for Vendor Signature	<input type="button" value="Assign"/>	IT Agreement				\$32,856.00
5949 <i>New contract</i>		Returned for Revision	<input type="button" value="Assign"/>	IT Agreement				\$20.00
5950 <i>Amendment</i>		Returned for Vendor Signature	<input type="button" value="Assign"/>	Other				
5946 <i>New contract</i>		Returned for Revision	<input type="button" value="Assign"/>	License				
5623 <i>New contract</i>		Returned for Revision	<input type="button" value="Assign"/>	IT Agreement				\$100.00
5640 <i>New contract</i>		Returned for Revision	<input type="button" value="Assign"/>	IT Agreement				\$10,000.00
5633 <i>New contract</i>		Returned for Revision	<input type="button" value="Assign"/>	Professional Services				\$6,000.00
5672 <i>New contract</i>		SUBMITTED	<input type="button" value="Assign"/>	Other				

**Quick View** View Notes See More *New contract*

**Canva Pro**

Review Status: Returned for Revision   
Assigned To:   
Business Lead:   
Additional Access 1:   
Additional Access 2:   
Additional Access 3:   
Add a Legal Note (optional)

**Dashboard Filters**

Vendor name    
Binder#    
Assigned to me

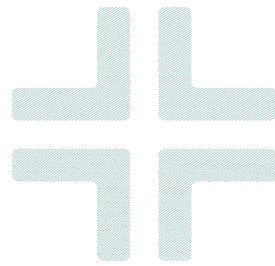
**Other Agreements for this Vendor**

- 4736
- 4753
- 4757



# Solution Overview

✓ Role-Based Comprehensive Search



🏠 **Contract Portal**

Search
Legal View
Finance View
Procurement View
Admin
Refresh data

Search
CLEAR
export

Filter by Contract Type ▼

Filter by Attorney ▼

Filter by year executed (1 or more) ▼

Filter by Department ▼

3009 results

Binder	Vendor Name	<input checked="" type="checkbox"/> Contract #	Attorney	Contract Type	Department	Business Lead	Submitter	Submission Amt
5995		<input type="checkbox"/> In progress		Professional Services Agreement/Statement of Work				\$0
5994		<input checked="" type="checkbox"/> In progress		IT Agreement – License				\$9,557,297.1
5993		<input checked="" type="checkbox"/> In progress		IT Agreement – License				\$612,625.3
5992		<input type="checkbox"/> In progress		Professional Services Agreement/Statement of Work				\$25,000.0
5991		<input type="checkbox"/> 21-281		Professional Services Agreement/Statement of Work				\$0
5990		<input type="checkbox"/> In progress		Memorandum of Understanding (MOU)				\$0
5989		<input type="checkbox"/> 21-287		IT Agreement – License				\$86,514.5

Quick View
View Notes
See More

Contract Purpose:

Key deliverables:

Executed on:

Docs

**Create a Relationship between Agreements**

Tick the box next to the 'Contract Number' header then select the contracts to associate. When all the agreements to associate appear below, click the one you want to be 'parent' to turn the row yellow. When done, click the 'Update' button to save your choices.

5994

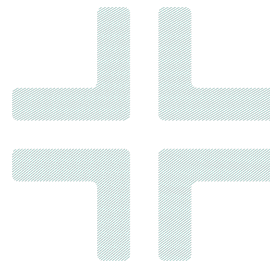
5993

Update



# Solution Overview

✓ Focused Search and Contract Status Overview



Contract Portal > Search Executed Agreements

+ Start a New Submission

Search by Vendor Name, Contract Purpose, Contract Number, or Project

Enter search text

Binder#

Executed on or after 12/31/2001

SEARCH RESET

Show Only AutoRenews

Submission Type

Contract Type

Contract Portal > Home

Template Agreements and Forms Search Executed Agreements + Start a New Submission

When scanning contract documents for upload, always scan using 'Optical Character Recognition' to enable document search.

My Agreements in Progress

with Legal with Finance requires YOUR Action

Binder	Vendor and Agreement Purpose	\$Value and Type	Submission Process	
6033	Software & Services	\$0.00 Grant Agreement New contract	NOT SUBMITTED No attorney assigned.	
6032	Software Licenses	\$0.00 IT Agreement – License New contract	SUBMITTED No attorney assigned. INITIAL REVIEW ONLY	
6031	Professional Services	\$50,000.00 Professional Services Agreement/Statement of Work New contract	NOT SUBMITTED No attorney assigned.	
6030	Health & Wellness	\$60,000.00 Independent Contractor Agreement Amendment	SUBMITTED No attorney assigned. INITIAL REVIEW ONLY	
6029	Software	\$0.00 Research Agreement Amendment	SUBMITTED No attorney assigned. INITIAL REVIEW ONLY	

# What You Get

- ✓ Power Apps based solution configured to meet your individual contract requirements
- ✓ Process maps to communicate and understand how critical stakeholders interact within the processes
- ✓ Training for day-to-day maintenance
- ✓ Options regarding long-term support and extensibility



# About Withum Digital



450+

Microsoft Cloud  
Deployments

(Office 365, SharePoint, Azure, Dynamics,  
Power BI)



16

Years as:  
Microsoft Gold  
Partner

Microsoft MVPs

On Staff

1



50+

Consultants

(Project Managers, Business  
Analysts, Developers, Data Scientists,  
Engineers, Software Developers,  
User Experience Designers)

Microsoft  
Partner



Gold Application Development  
Gold Collaboration and Content  
Gold Cloud Productivity  
Silver Cloud Platform  
Silver Enterprise Mobility Management

# Get started now!

Call us today to discuss your needs.

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