Enbu Consulting has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

CRM Contract Manager will enable you to optimise the lifetime value of your business relationships by centralising, standardising and systemising the entire contract lifecycle, from creation through expiration or renewal.

**Document Management Functionality**

The Document Management Facility provides the ability to create any number of customized documents based on your contract information, including contracts, deal letters, transmittal letters, summaries, abstracts, event letters, and much more. By using pre-drawn, pre-approved clause and term libraries, you can significantly reduce contract administration time.

*Screenshot of generated Contract Documents highlighting changed areas in Red.*
**Clause Library**

The Clause Library contains preferred and approved alternate language clauses. The Clause Library can then be referenced when creating contract documents and clauses can be imported into the contract document you are generating.

*Screenshot of a Clause Library. You can also add and modify new clauses, depending on workflows entered in the system*

**Notifications and Alerts**

By establishing rules for workflow processes, you can be assured that the proper approvals, notifications and alerts go into effect for every contract at precisely the right time and involve precisely the right people. Any lapse in a given workflow process is immediately flagged for resolution.

*Screenshot of email notification sent. You can also receive notifications on screen or by SMS.*

**Notifications pop up from certain workflows entered into the system. For example: Flag all contracts that are up for renewal within 2 months.**

**Repository - Contract Template Library**

Any type of contract can be captured, managed, and analyzed. Included in the product is an audit trail which records each contract revision, the person who made the change, and each time the contract was printed, faxed, or emailed.
**Contract Viewer**
The Contract Viewer allows real time access to key contract data. All information is available online via the web interface and searchable by user-defined keywords.

**Security & Permissions**
CRM Contract Manager provides a robust, enterprise-ready security model.

**Personal and Team Dashboards for your contracts**
The dashboard provides a convenient launch point for all of your favorite activities within the system, and automatically displays the information that needs to be in the centre of your radar each day. Each user can have their own individual dashboard, or you can have a team dashboard, you can display contract status, open tasks, searching, and reports (spending patterns, expiry dates etc…).

The dashboard can also include a calendar and individual alerts for expiring contracts and task deadlines.
**Report Function**

Using the Reports Function, any number of custom reports can be created such as: status reports, financial commitments, deliverable commitments. Export options include: Word, PDF, HTML, rich text, plain text, or Excel. Reports can also be generated for one contract or a group of contracts derived from the search feature or from all contracts – and always within the security rights defined for the user. All information in the reports can be configured to using contract terminology that a business user easily identifies with.

**Integration and Customisation**

Like all our products for Sage CRM, Contract Manager is completely customisable and can be configured to suit the needs of the business.

**Enbu Business Manager**

**CRM Contract Manager**

is one of 5 products that make up the **Enbu Business Manager** Suite.

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