Creatio Academy

Document flow

Version 7.17

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Create a contract

PRODUCTS: SALES ENTERPRISE

Use the [*Contracts*] section to manage the contracts that you sign with the customers as part of closing a sales deal.

The section stores information about contract parties, purchase amount, addenda and specifications, scan copies, current status and links to other records, e.g., opportunities and documents.

To create a contract:

1. Go to the [*Contracts*] section.
2. Click the [*New contract*] button.
   A new contract page opens, with the automatically generated contract number. Creatio generates document numbers according to the "ContractCodeMask" system setting. A new document page will have the following default values in its fields:
   a. [*Type*] – select "Contract." This value cannot be changed after you save the new record.
   b. [*Start date*] – the user's current date.
   c. [*Owner*] – the current user's contact.
   d. [*Status*] – the default status for all new contracts is "Draft." The field uses the [*Contract statuses*] lookup.
3. [*Account*] – specify the customer's account. Tis is the other party of the contract.
4. [*Account's banking details*] – customer's payment details. You can select data from the [*Banking details*] detail of the [*Account info*] tab on account page.
5. [*Our company*] – the account that represents your party in the contract. You can select from accounts of the "Our company" type.
6. [*Our banking details*] – the field unlocks once you populate the [*Our company*] field. You can select data from the [*Banking details*] detail of the [*Account info*] tab on your company page.
7. [*Amount*] – specify the contract currency and amount. If a contract is added based on an order, the [*Amount*] field value is calculated automatically and reflects the total cost of the ordered products. You can select only those ordered products you need to connect to the contract. Read more in the "Create a contract from an order" article.
8. Add links to other connected records on the [*Connected to*] detail.
9. Add subsequent agreements, addenda or specifications to the [*Subordinate contracts*] detail. Only contract records with the "Specification" and "Addendum" types are available on the [*Subordinate contracts*] detail.
   To add a **new** subordinate contract, click the + button. The [*Parent contract*] field on the subordinate contract page will be populated automatically.
   To connect an **existing** subordinate contract to the current contract, click the ⋮ button and select the "Connect to existing" option from the menu.
10. If there are orders linked to the contract, go to the [*Contract details*] tab and link the products sold. When adding a contract based on an order, you can select several ordered products. The selected products will be

automatically added to the [*Products*] detail of the [*Contract details*] tab. Click the + button to add the rest of ordered products.

11. If you need to approve a contract, for example, agree upon its terms with other employees, use Creatio approvals. As part of the standard approval procedure, an “approver” employee sets the approval result (approved or rejected). Approving contracts is identical to approving orders and invoices. Working with approvals is covered in the “Approvals” article.
12. Click [*Save*].

Create a document

PRODUCTS: SALES CREATIO

Use the [*Documents*] section to manage incoming and outgoing documents, register their numbers, save scan copies, etc.

The records from the [*Documents*] section will supplement customer communication history, display on the [*Timeline*] tab and help build a complete customer or deal profile. Use the section quick filters to search for the needed document:

- By date (the [*Date*] field of the document page).
- By owner (the [*Owner*] field of the document page).

To create a new document:

1. Go to the [*Documents*] section.
2. Click the [*New document*] button.
   A new document page opens, with the automatically generated document number. Creatio generates document numbers according to the “DocumentCodeMask” system setting. A new document page will have the following default values in its fields:
   a. [*Number*] – the number of the new document.
   b. [*Status*] – “Active.”
   c. [*Date*] – the user’s current date.
   d. [*Owner*] – the current user’s contact.
3. Populate the [*Type*] field by specifying what kind of document this is.
4. Populate the [*Account*] and [*Contact*] fields to link the document to a specific customer.
5. Add links to other connected records on the [*Connected to*] detail. If you fill in the [*Documents*] detail of a record, the record will be connected to the specified document.
6. Click [*Save*].