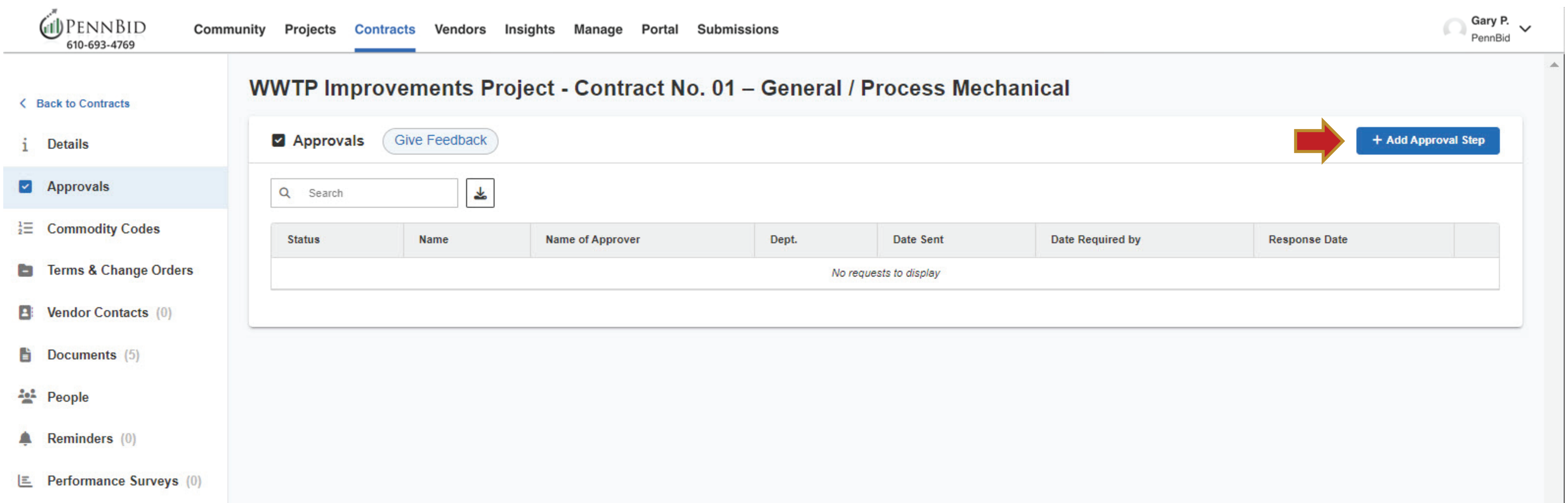
Managing Your Contract

Contract life-cycle management can include tracking approvals, changes, reminders, completion dates and provide fast access to reference materials and contacts.

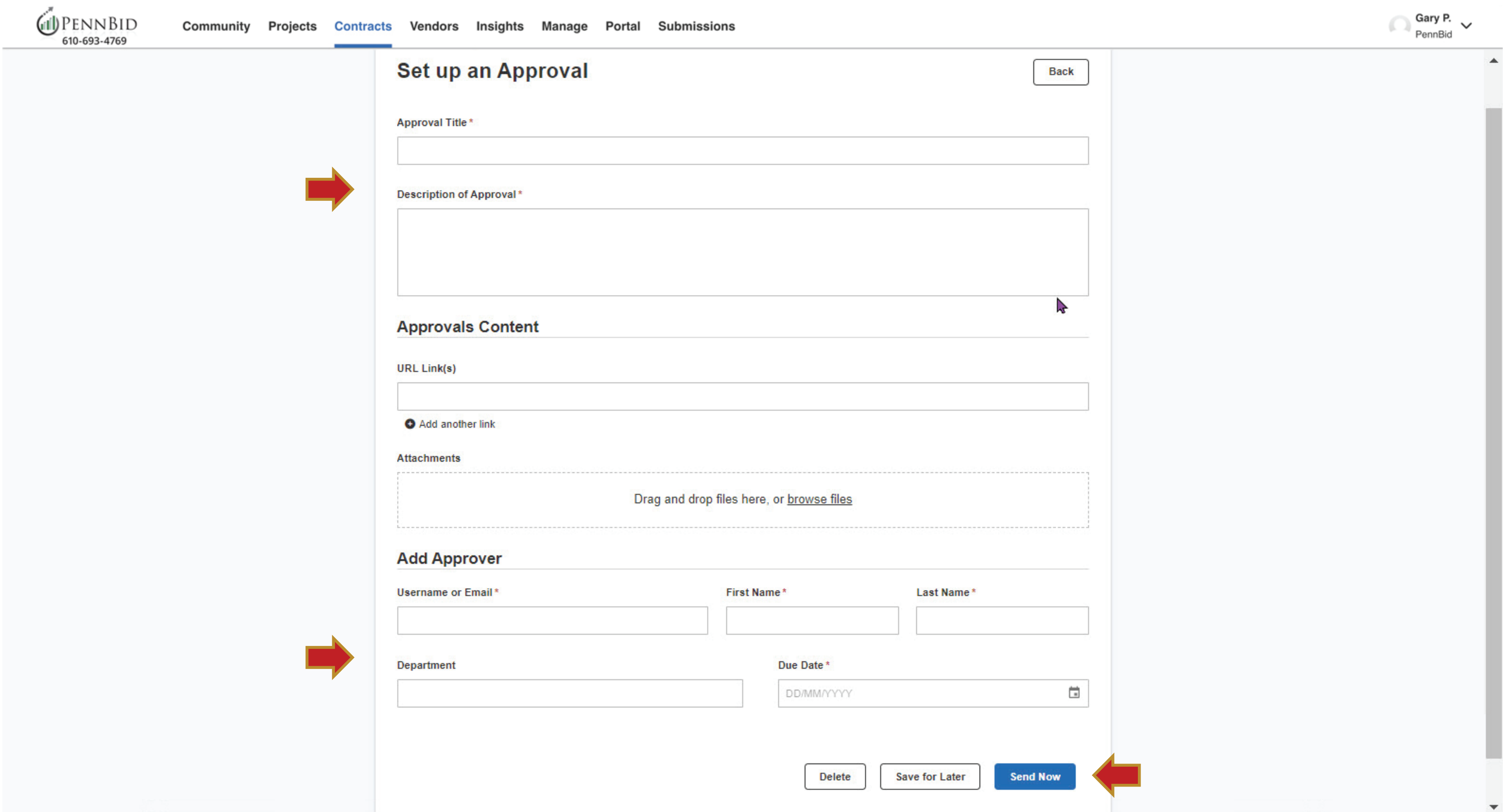
Approvals section: Track approvals of project milestones such as revisions, critical events, phase completion, payments, etc.

Click the **Add Approval Step** button.



Add **Approval Title** and **Description** along with any supporting document files

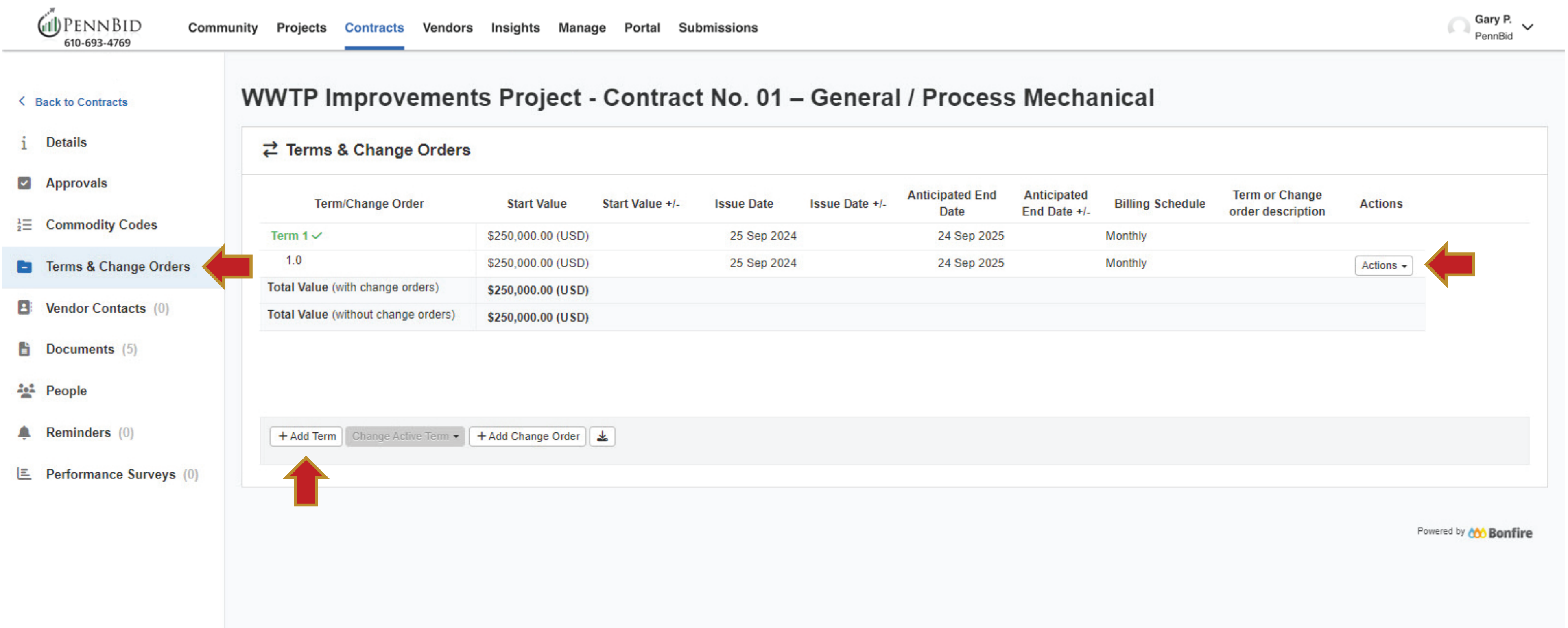
Add Approver by entering their **Username or Email**, **First Name, Last Name**, and **Due Date**. Choose **Save for Later** or **Send Now**.



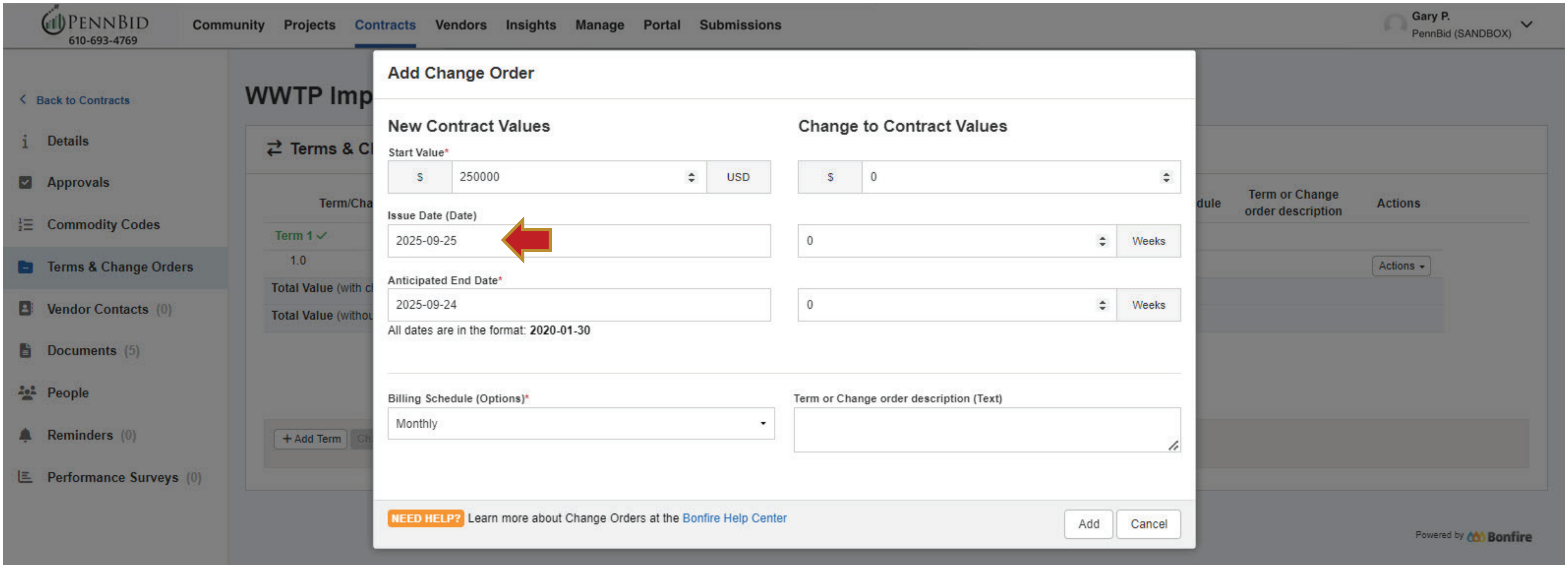
Terms and Change Orders section is used to track changes to terms of the contract or scope of work.

Terms are the separate billing components of a contract. New terms are added by selecting **Add Term** button and can be edited using the **Actions** button in the line item.

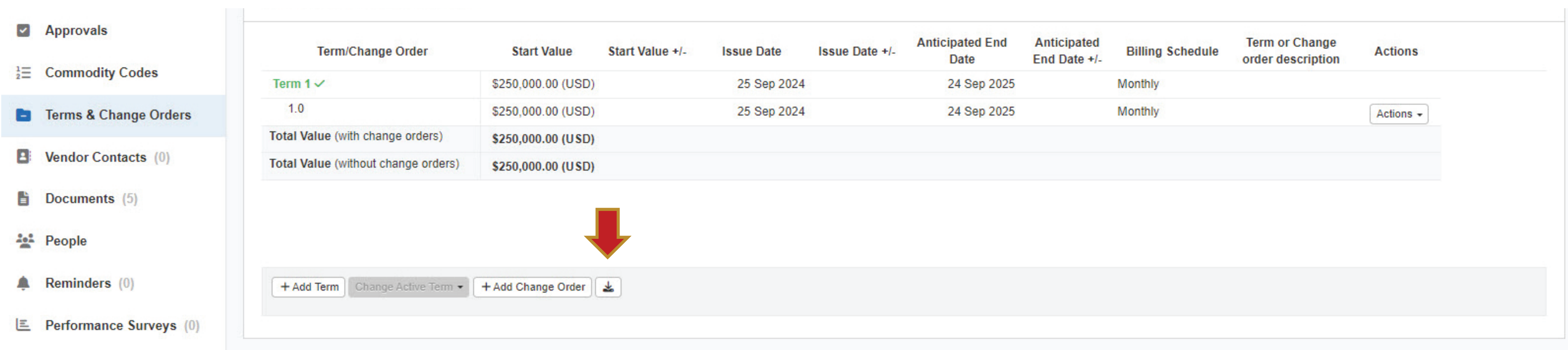
Change Order is a subcategory of the **Term** to document new parameters. Ensure you have the correct **Term** when adding a change order by selecting **Change Active Term**.



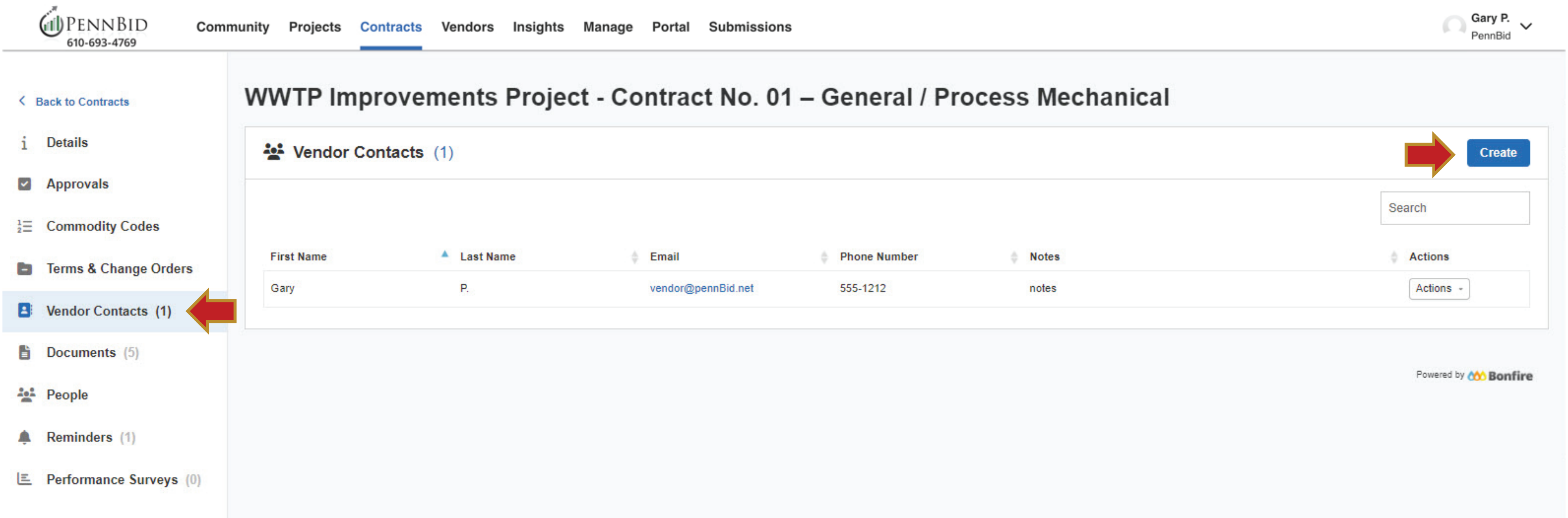
Note: When setting up an additional term, the system will default the dates to the end of the first term and will show the project status as pending when toggled to that term. Dates may need to be adjusted accordingly.



A download button has been provided to generate an excel summary sheet of the project Terms and Change Orders



Use the **Vendor Contacts** section to manage vendor representatives for quick reference by selecting the **Create** button.



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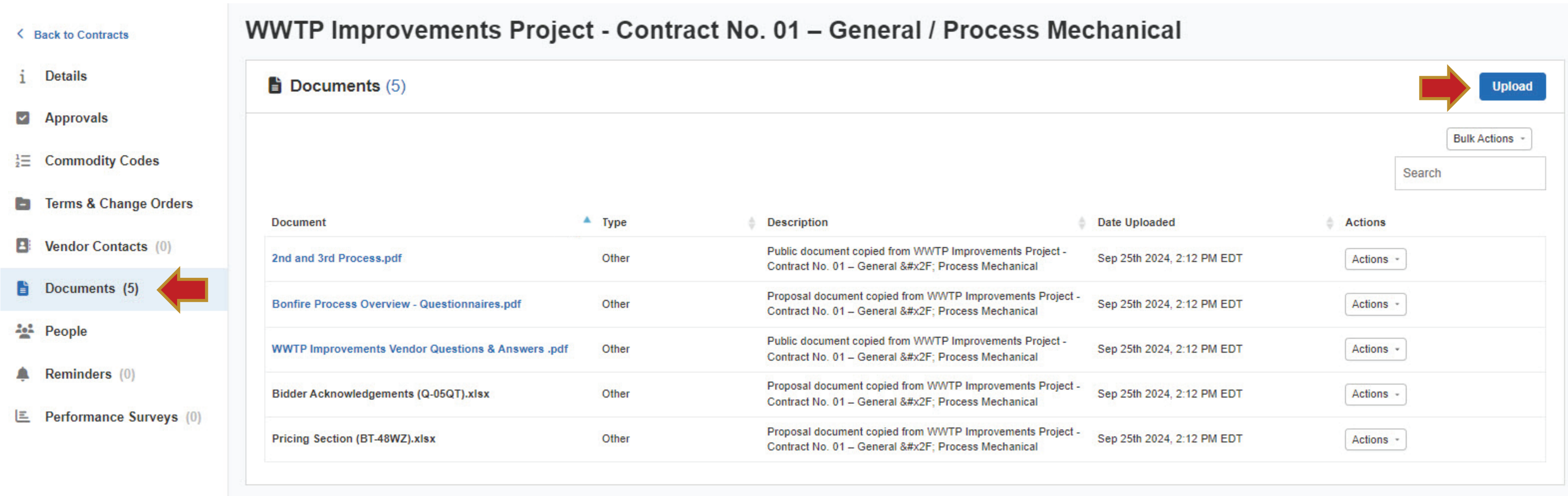
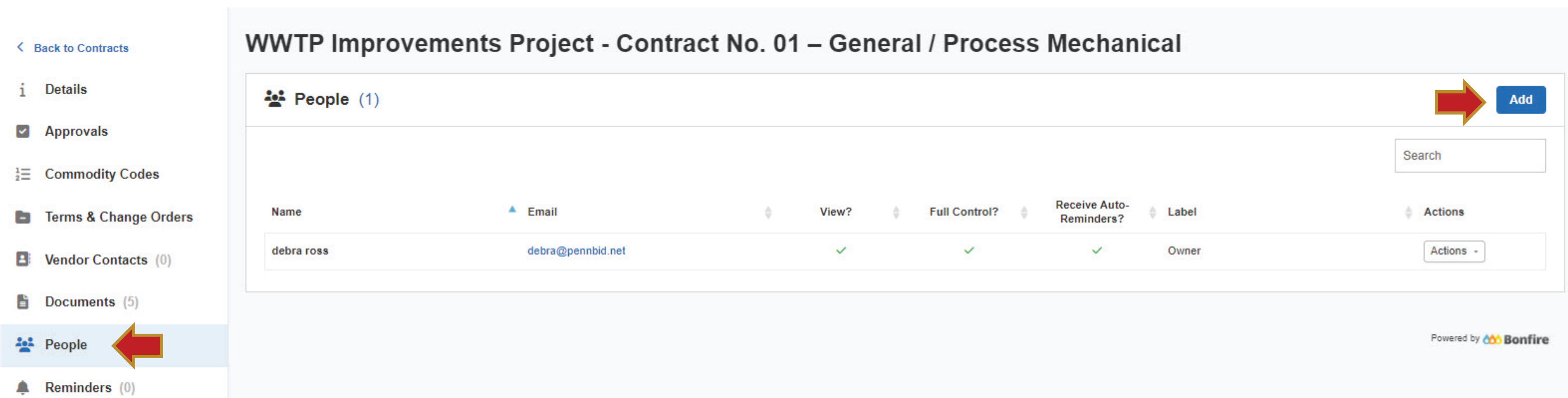
The **Documents** section provides quick reference project documents from the initial bid or add new documents such as receipts and/or important communications. Select the **Upload** button and choose the desired file from the source.



Add **People** as required to have access to the contract control or viewing by selecting the **Add** button in the upper right corner.



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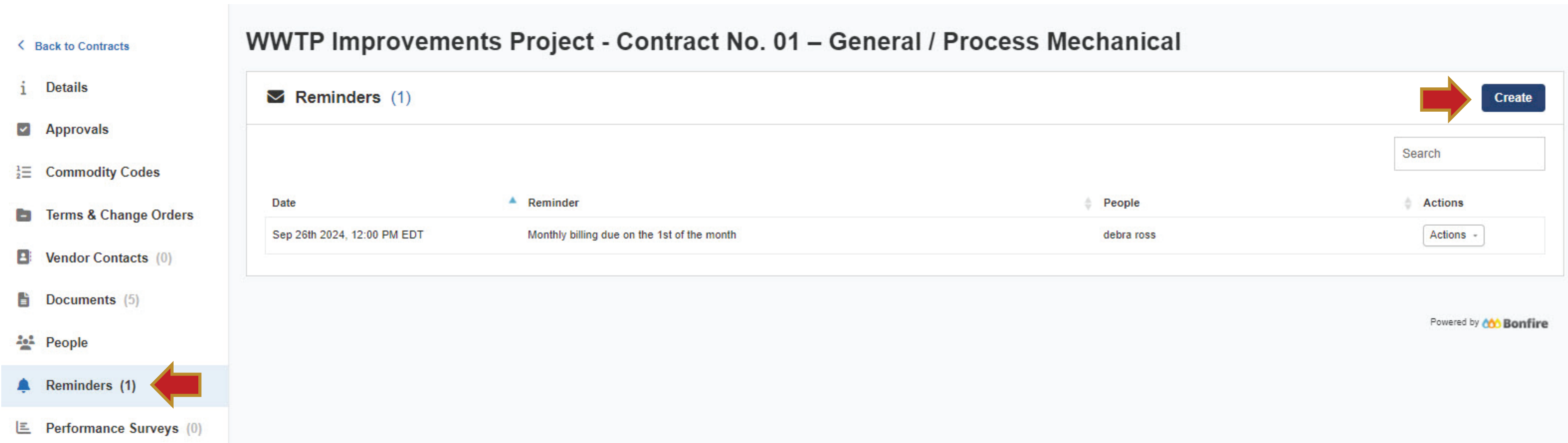
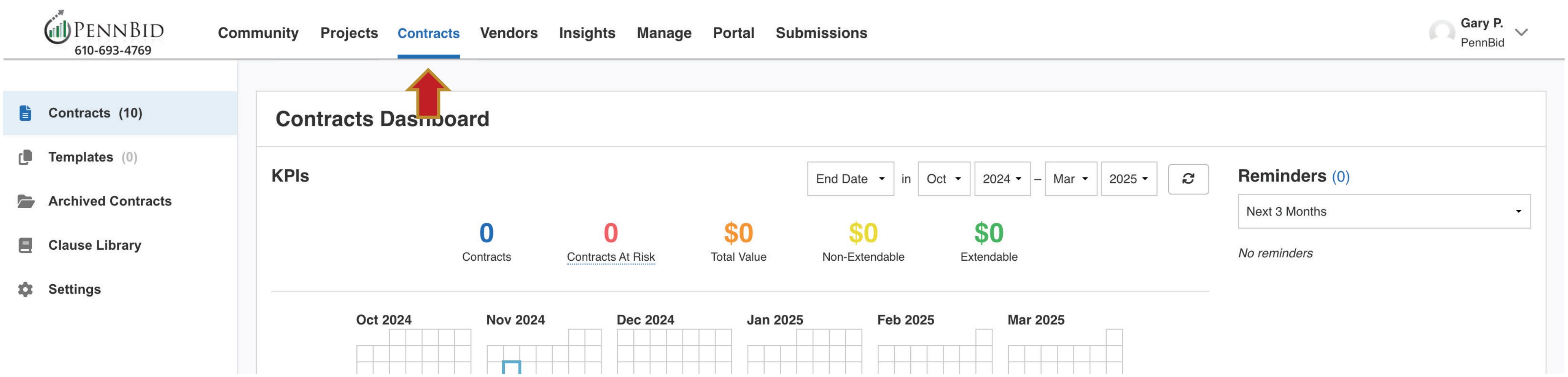
Schedule **Reminders** and notifications to **People** for project milestones such as payments, inspections, renewals, etc. by clicking the "Create" button in the upper right corner. Emails will automatically be sent to the indicated individual.



All existing Contracts can be accessed from the **Contracts Module** on the **Home** page.



Should you have any questions or require assistance, please contact PennBid at info@pennbid.net, or **610-693-4769**.