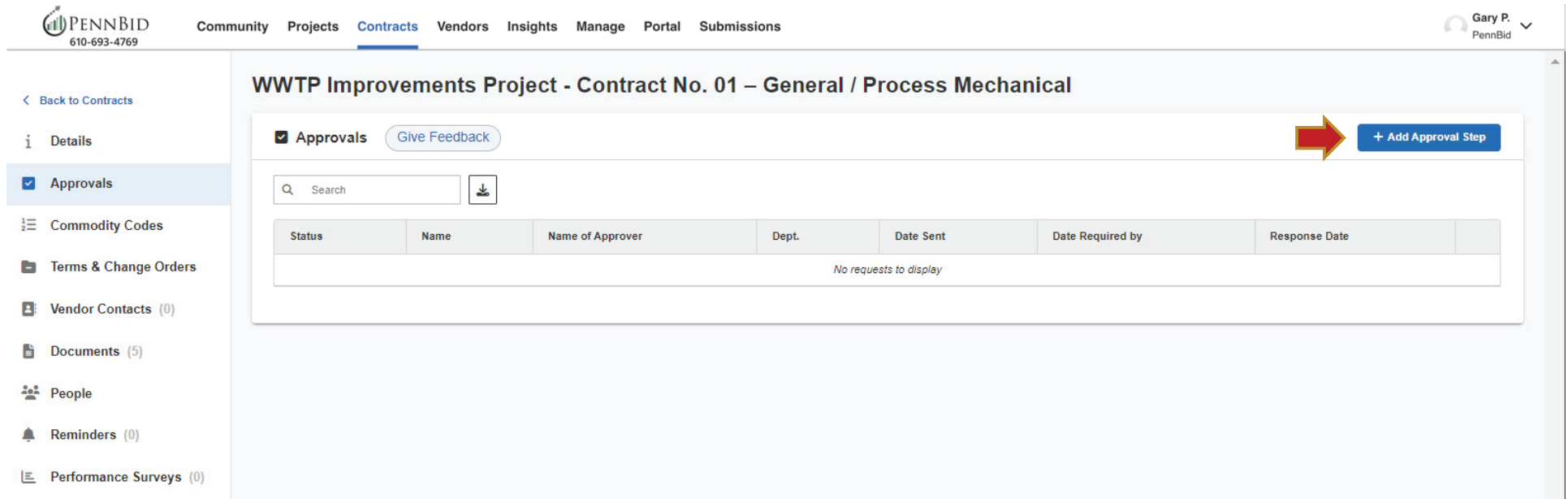


Managing Your Contract

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.

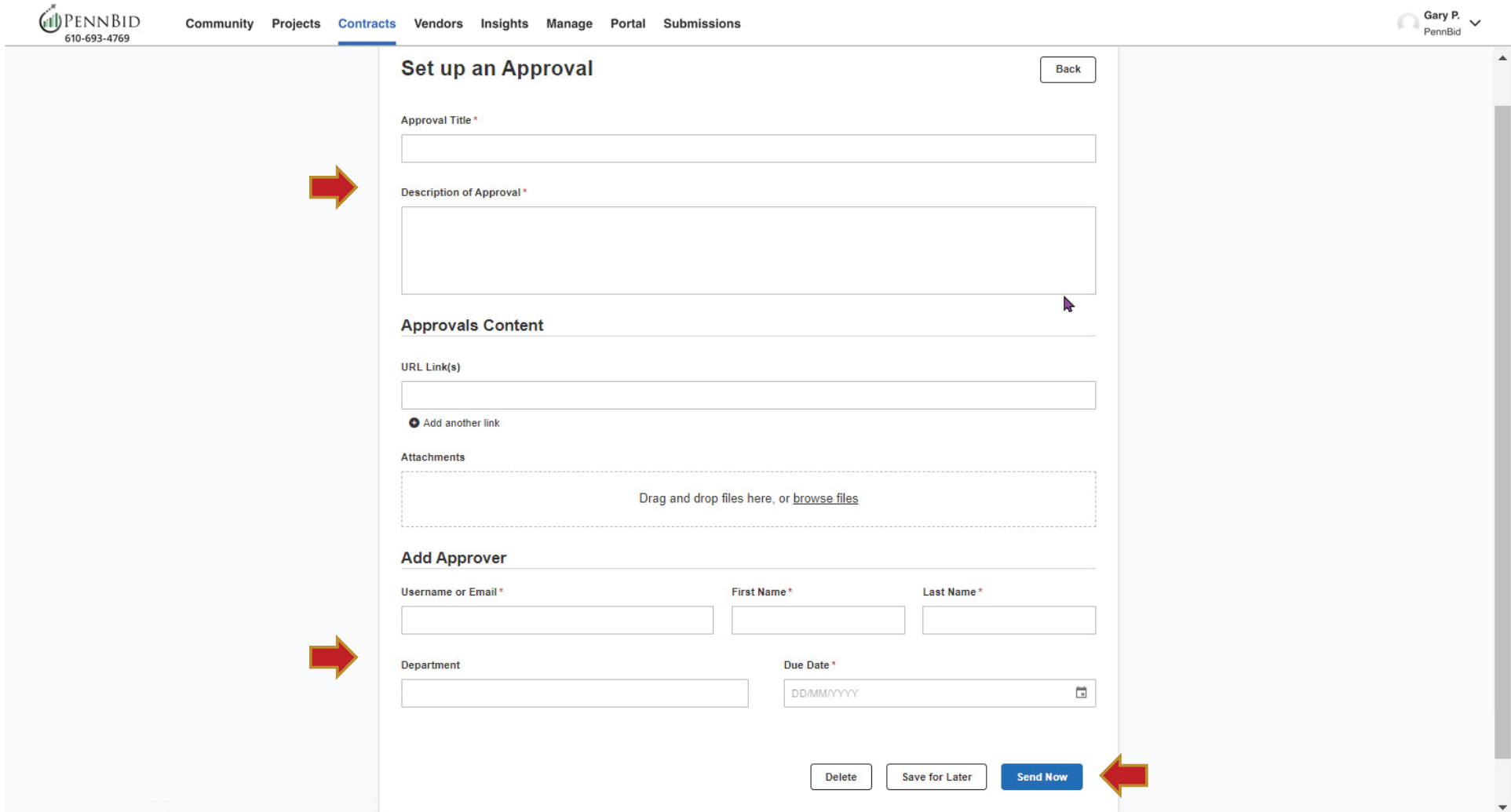
Click the **Add Approval Step** button.



The screenshot shows the PennBid web application interface. The top navigation bar includes links for Community, Projects, Contracts (highlighted), Vendors, Insights, Manage, Portal, and Submissions. The user profile 'Gary P. PennBid' is in the top right. The left sidebar contains a list of navigation items: Back to Contracts, Details, Approvals (selected), Commodity Codes, Terms & Change Orders, Vendor Contacts (0), Documents (5), People, Reminders (0), and Performance Surveys (0). The main content area is titled 'WWTP Improvements Project - Contract No. 01 – General / Process Mechanical'. It features a 'Approvals' section with a 'Give Feedback' button and a '+ Add Approval Step' button, which is highlighted with a red arrow. Below this is a search bar and a table with columns: Status, Name, Name of Approver, Dept., Date Sent, Date Required by, and Response Date. The table currently displays 'No requests to display'.

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**.



Set up an Approval Back

Approval Title *

Description of Approval *

Approvals Content

URL Link(s)

[Add another link](#)

Attachments

Drag and drop files here, or [browse files](#)

Add Approver

Username or Email * First Name * Last Name *

Department Due Date *


DD/MM/YYYY

Delete Save for Later 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**.


610-693-4769
Community
Projects
Contracts
Vendors
Insights
Manage
Portal
Submissions
Gary P. PennBid

Back to Contracts
Details
Approvals
Commodity Codes
Terms & Change Orders
Vendor Contacts (0)
Documents (5)
People
Reminders (0)
Performance Surveys (0)

WWTP Improvements Project - Contract No. 01 – General / Process Mechanical

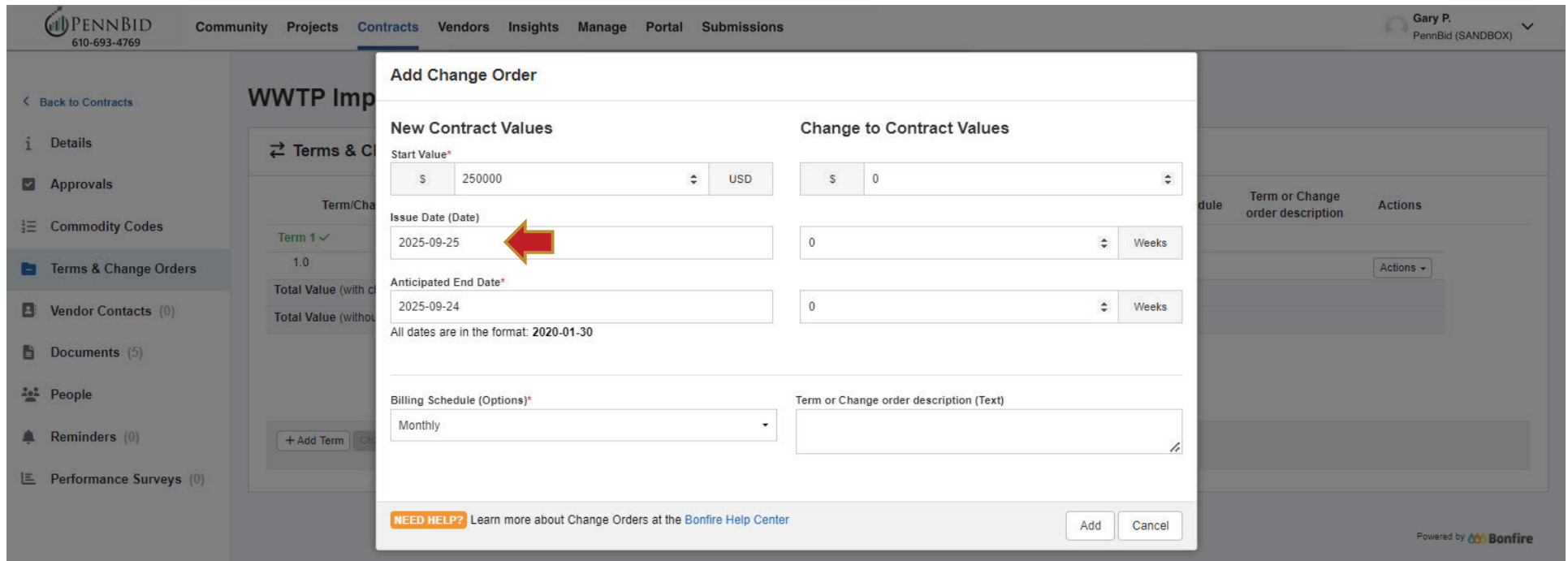
Terms & Change Orders

Term/Change Order	Start Value	Start Value +/-	Issue Date	Issue Date +/-	Anticipated End Date	Anticipated End Date +/-	Billing Schedule	Term or Change order description	Actions
Term 1 ✓	\$250,000.00 (USD)		25 Sep 2024		24 Sep 2025		Monthly		
1.0	\$250,000.00 (USD)		25 Sep 2024		24 Sep 2025		Monthly		Actions
Total Value (with change orders)	\$250,000.00 (USD)								
Total Value (without change orders)	\$250,000.00 (USD)								

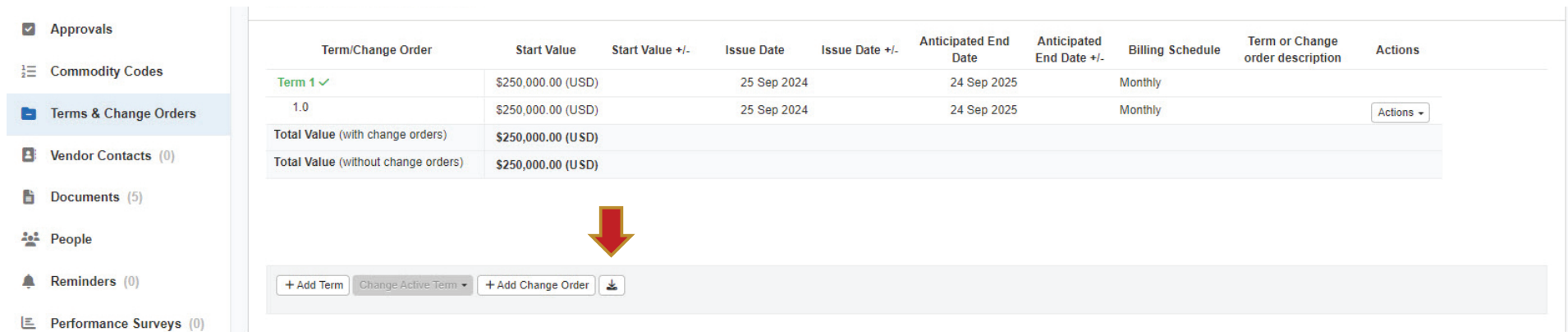
+ Add Term
Change Active Term
+ Add Change Order

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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



Term/Change Order	Start Value	Start Value +/-	Issue Date	Issue Date +/-	Anticipated End Date	Anticipated End Date +/-	Billing Schedule	Term or Change order description	Actions
Term 1 ✓	\$250,000.00 (USD)		25 Sep 2024		24 Sep 2025		Monthly		
1.0	\$250,000.00 (USD)		25 Sep 2024		24 Sep 2025		Monthly		Actions
Total Value (with change orders)	\$250,000.00 (USD)								
Total Value (without change orders)	\$250,000.00 (USD)								

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


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[Back to Contracts](#)

Details

☒ Approvals

Commodity Codes

Terms & Change Orders

Vendor Contacts (1)

Documents (5)

People

Reminders (1)

Performance Surveys (0)


WWTP Improvements Project - Contract No. 01 – General / Process Mechanical

Vendor Contacts (1)

Search

First Name	Last Name	Email	Phone Number	Notes	Actions
Gary	P.	vendor@pennBid.net	555-1212	notes	<div>Actions</div>

Create

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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.

[Back to Contracts](#)

Details

Approvals

Commodity Codes

Terms & Change Orders

Vendor Contacts (0)

Documents (5)

People

Reminders (0)

Performance Surveys (0)

Documents (5)

Upload

Bulk Actions

Search

Document	Type	Description	Date Uploaded	Actions
2nd and 3rd Process.pdf	Other	Public document copied from WWTP Improvements Project - Contract No. 01 – General / Process Mechanical	Sep 25th 2024, 2:12 PM EDT	Actions
Bonfire Process Overview - Questionnaires.pdf	Other	Proposal document copied from WWTP Improvements Project - Contract No. 01 – General / Process Mechanical	Sep 25th 2024, 2:12 PM EDT	Actions
WWTP Improvements Vendor Questions & Answers .pdf	Other	Public document copied from WWTP Improvements Project - Contract No. 01 – General / Process Mechanical	Sep 25th 2024, 2:12 PM EDT	Actions
Bidder Acknowledgements (Q-05QT).xlsx	Other	Proposal document copied from WWTP Improvements Project - Contract No. 01 – General / Process Mechanical	Sep 25th 2024, 2:12 PM EDT	Actions
Pricing Section (BT-48WZ).xlsx	Other	Proposal document copied from WWTP Improvements Project - Contract No. 01 – General / Process Mechanical	Sep 25th 2024, 2:12 PM EDT	Actions

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

< Back to Contracts

WWTP Improvements Project - Contract No. 01 – General / Process Mechanical

- i Details
- ✓ Approvals
- ☰ Commodity Codes
- 📁 Terms & Change Orders
- 👤 Vendor Contacts (0)
- 📄 Documents (5)
- 👥 People ←
- 🔔 Reminders (0)

👥 **People** (1)

Add

Name	Email	View?	Full Control?	Receive Auto-Reminders?	Label	Actions
debra ross	debra@pennbid.net	✓	✓	✓	Owner	<div>Actions ▾</div>


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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.

[Back to Contracts](#)


- Details
- Approvals
- Commodity Codes
- Terms & Change Orders
- Vendor Contacts (0)
- Documents (5)
- People
- Reminders (1)**
- Performance Surveys (0)

WWTP Improvements Project - Contract No. 01 – General / Process Mechanical


 **Reminders (1)**

Create

Date	Reminder	People	Actions
Sep 26th 2024, 12:00 PM EDT	Monthly billing due on the 1st of the month	debra ross	Actions -


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



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[Community](#)
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[Contracts](#)
[Vendors](#)
[Insights](#)
[Manage](#)
[Portal](#)
[Submissions](#)



Gary P. PennBid

- Contracts (10)**
- Templates (0)
- Archived Contracts
- Clause Library
- Settings

Contracts Dashboard

KPIs

End Date

in

Oct

2024

-

Mar

2025

Refresh

Reminders (0)

Next 3 Months

No reminders

0

Contracts

0

Contracts At Risk

\$0

Total Value

\$0

Non-Extendable

\$0

Extendable

Oct 2024

Nov 2024

Dec 2024

Jan 2025

Feb 2025

Mar 2025

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