

Contract Management Tool

General Contractor Training Tutorial

Contract Management Tool Tutorial

1. Contract Initiation Workflow
 - a. Drafting a Contract
 - b. Sending a Contract to counterpart for review
2. Contract Revision Workflow (if applicable)
 - a. Review counterpart edits
 - b. Sending a reviewed contract to counterpart
3. Contract Execution

1a. Drafting a Contract - (1 of 3)

- 1 Navigate to the Contracts Management tab by clicking on Contracts.
- 2 Initiate the contract creation process by clicking on New Contract.

The screenshot displays the Constrafor web application interface. At the top, a navigation bar includes the logo and menu items: DASHBOARD, PROJECTS, **CONTRACTS** (highlighted with a yellow underline and a hand icon labeled '1'), CERTIFICATES OF INSURANCE, INVOICING, DIVERSITY, and CONTRACTORS. On the right side of the navigation bar are icons for chat, notifications, and user profile. Below the navigation bar, the main content area is titled 'CONTRACTS'. It features a sub-navigation bar with 'MY CONTRACTS' (underlined), 'ARCHIVED CONTRACTS', 'MY TEMPLATES', and 'SETTINGS'. A blue 'NEW CONTRACT' button is located on the right side of this sub-navigation bar, with a hand icon labeled '2' pointing to it. Below the sub-navigation bar, there are filter options for 'VIEW BY' (Status: ALL, Project: ALL, Type: ALL, Counterpart: ALL, Category: ALL) and a search box labeled 'Search by title'. A table header is visible with columns: TITLE, COUNTERPART, TYPE, PROJECT, CREATED, LAST UPDATE, CATEGORY, ATTACHMENTS, and STATUS. The table content area is empty, displaying the message: 'You have no contracts now. Add a contract and it can be chosen here.' with an 'Add contracts' button below it.

1a. Drafting a Contract - (2 of 3)

Draft your contract by either uploading a document, utilizing a pre-existing template or create from a blank document.

! You can upload an Executed Contract for repository and tracking purposes by clicking on “Upload PDF”.

The screenshot shows the Constrafor web application interface. At the top, there is a navigation bar with the following items: **constrafor**, **DASHBOARD**, **PROJECTS**, **CONTRACTS** (highlighted), **CERTIFICATES OF INSURANCE**, **INVOICING**, **DIVERSITY**, and **CONTRACTORS**. On the right side of the navigation bar, there are icons for a chat bubble, a notification bell with a red '6', and a user profile icon.

The main content area is titled **CONTRACTS**. Below this title, there are tabs for **MY CONTRACTS**, **ARCHIVED CONTRACTS**, **MY TEMPLATES**, and **SETTINGS**. A **NEW CONTRACT** button is located in the top right corner of this section. Below the tabs, there are filter options for **VIEW BY** (Status: ALL, Project: ALL, Type: ALL, Counterpart: ALL) and a table with columns for **TITLE**, **COUNTERPART**, **TYPE**, **PR**, **CATEGORY**, **ATTACHMENTS**, and **STATUS**. The table currently shows 0 of 0 items.

A modal dialog titled **New Contract** is open in the center of the screen. The dialog has a yellow header with a close button (X). Below the header, the text **Start contract from** is displayed. There are four options, each in a white box with a light gray border and a cloud upload icon: **Upload a Document**, **Existing Template**, **Blank Document**, and **Upload PDF**. At the bottom of the dialog, there are two buttons: **Cancel** and **Next**.

1a. Drafting a Contract - (3 of 3)

Populate your contract details information.

The following fields are required for sending a contract:

1. Title
2. Category
3. Counterpart
4. Signer (on the General Contractor side)

Then click **Save**

The screenshot shows the 'New Contract' form in the Constrafor application. The form is titled 'New Contract' and is open over a 'CONTRACTS' dashboard. The dashboard shows a table of contracts with columns for 'VIEW BY', 'Status', 'Project', and 'Type'. The 'New Contract' form has the following fields and values:

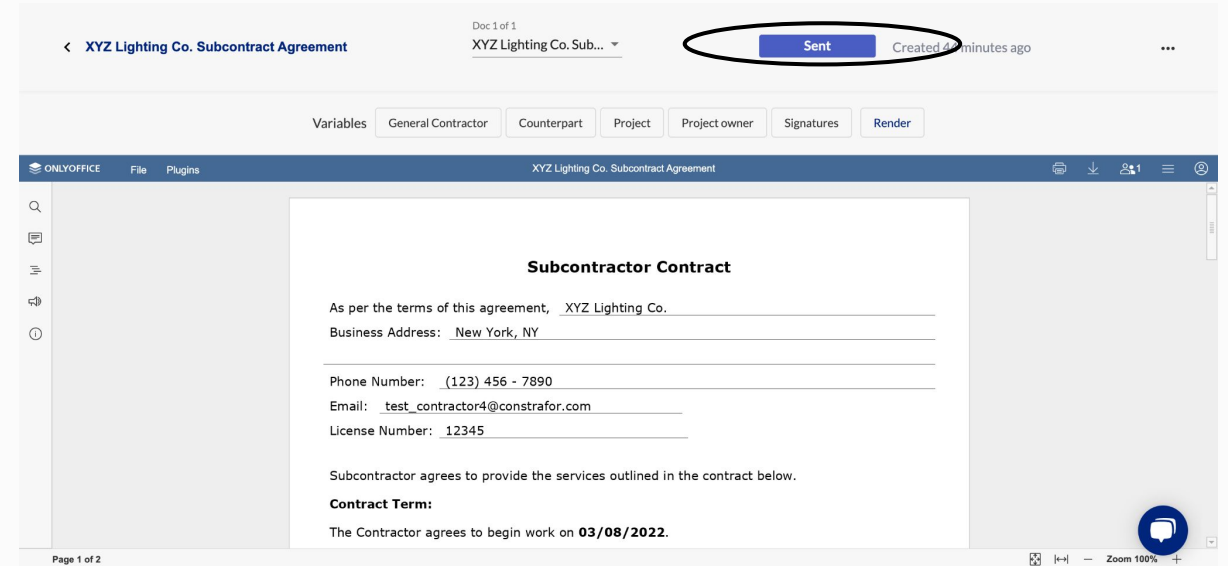
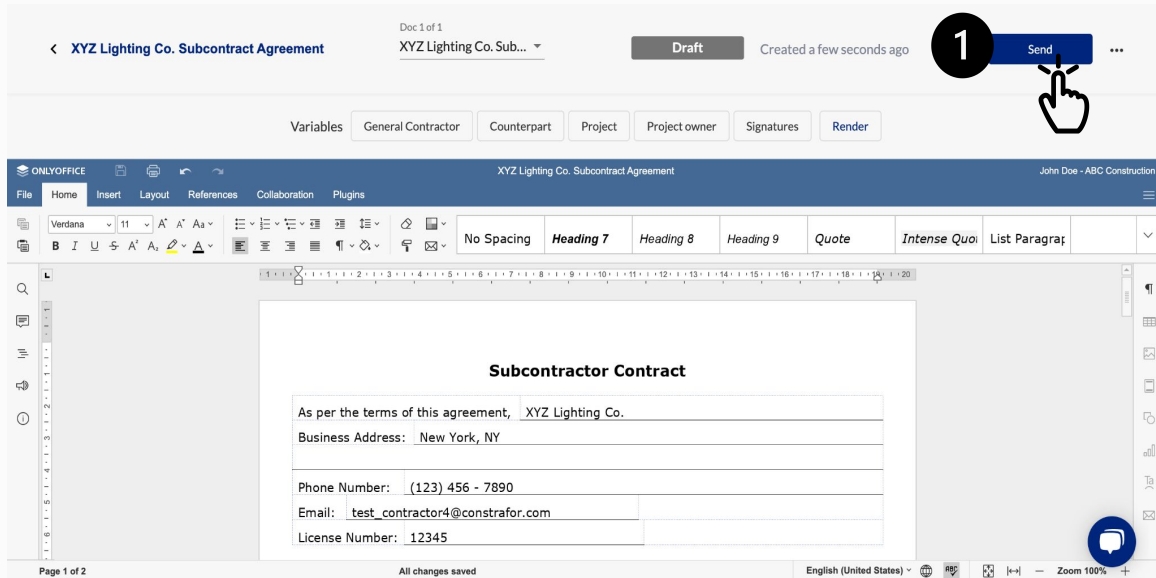
- Title: XYZ Lighting Co. Subcontractor Agreement
- Project: Building the World of Tomorrow
- Category: Subcontract Agreement
- Require COIs from subcontractor before signing:
- Contract Amount: \$100,000.00
- Counterpart: Subcontractor (selected)
- Search Counterparts: XYZ Lighting Co.
- Selected Counterpart: XYZ Lighting Co. (Test Contractor 4 test_contractor4@constrafor.com)
- Signer: ralph.maarawi@constrafor.com, John Doe
- Contract documentation: Upload or drag files here
- Contract exhibit files: No exhibit documents for selected project

At the bottom of the form, there are 'Cancel' and 'Save' buttons. A hand cursor is pointing at the 'Save' button.

1b. Sending a contract

1 Contract in draft status can be edited. Once contract is finalized, click **Send**.

2 Contract status will be changed from Draft to **Sent** and an email will be sent to the counterpart.



! Please make sure to include signature tags in the contract draft prior to sending to counterpart. If missing, there will be no way to electronically sign the contract.

Counterpart can ...

- Option 1: Negotiate the contract by suggesting modifications to the contract language
- Option 2: Sign the contract

2a. Review counterpart edits (if applicable) - (1 of 6)

After the counterpart has submitted his suggested edits for review, the contract status will change from **Editing** to **Pending Approval** and is now awaiting the General Contractor approval.

General Contractor user(s) that has access to the contract will receive an email notification with link to contract

! Use filter bars to navigate through your Contracts list to locate contracts that include modifications pending your approval.

The screenshot shows the Constrafor web application interface. At the top, there is a navigation bar with the Constrafor logo and menu items: DASHBOARD, PROJECTS, **CONTRACTS**, CERTIFICATES OF INSURANCE, INVOICING, DIVERSITY, and CONTRACTORS. On the right side of the navigation bar, there are icons for a chat bubble, a notification bell with a red '2' badge, and a user profile icon.

Below the navigation bar, the main heading is "CONTRACTS". Underneath, there are tabs for "MY CONTRACTS" (selected), "ARCHIVED CONTRACTS", "MY TEMPLATES", and "SETTINGS". A "NEW CONTRACT" button is located on the right side of this section.

The "MY CONTRACTS" section features a "VIEW BY" dropdown menu currently set to "PENDING APPROVAL". To the right of this are several filter bars: "Project ALL", "Type ALL", "Counterpart ALL", and "Category ALL". There is also a search bar labeled "Search by title" and a pagination indicator "1 - 1 of 1".

Below the filter bars is a table with the following columns: TITLE, COUNTERPART, TYPE, PROJECT, CREATED, LAST UPDATE, CATEGORY, ATTACHMENTS, and STATUS. The table contains one row of data:

TITLE	COUNTERPART	TYPE	PROJECT	CREATED	LAST UPDATE	CATEGORY	ATTACHMENTS	STATUS
XYZ Lighting Co. Subcontract Agreement	XYZ Lighting Co. ✓	Subcontractor	Building the World of Tomorrow	03/08/2022	03/08/2022	Subcontract Agreement	0	Pending Approval

At the bottom right of the page, there is a blue circular icon with a white speech bubble.

*Filter bars assist with navigating through large sums of data.

2a. Review counterpart edits (if applicable) - (2 of 6)

Navigate through counterpart requested modifications:

Quick Tip: Counterpart edits are displayed in “color” AND you can navigate through them in the Collaboration tab

The screenshot displays the Constrafor document review interface. At the top, the document title is "XYZ Lighting Co. Subcontractor Agreement" with a "Pending Approval" status and a "Review completed" button. Below the title, there are tabs for "Variables" including "General Contractor", "Counterpart", "Project", "Project owner", "Signatures", and "Render". The main interface shows the "ONLYOFFICE" editor with a "Collaboration" tab selected. The document content includes a "Subcontractor Contract" section with a table of fields: "Business Address" (highlighted in blue), "Phone Number", "Email", and "License Number". A "Review Changes" dialog box is open on the right, showing a change to the "Business Address" field with options to "Accept" or "Reject".

Doc 1 of 2
XYZ Lighting Co. Sub...
Pending Approval
Created 5 minutes ago
Review completed

Variables: General Contractor, Counterpart, Project, Project owner, Signatures, Render

ONLYOFFICE
XYZ Lighting Co. Subcontractor Agreement
Vice President - ABC Construction

File Home Insert Layout References Collaboration Plugins

Co-editing Mode Add Comment Remove Resolve Track Changes Display Mode Previous Next Accept Reject Compare Version History

Subcontractor Contract

As per the terms of this agreement,	XYZ Lighting Co.
Business Address:	130 7th Avenue, unit 149, New York, NY 10011New-York, NY
Phone Number:	(123) 456 - 7890
Email:	test_contractor4@constrafor.com
License Number:	12345

Subcontractor agrees to provide the services outlined in the contract below.

Contract Term:

Page 1 of 2
English (United States)
Zoom 100%

2a. Review counterpart edits (if applicable) - (3 of 6)

Approve or reject counterpart edits:

Click into any “colored” edit to accept or reject.

Navigate to the “collaboration” tab, click on Next then on **Approve** or **Reject**.

The screenshot shows the ONLYOFFICE interface for a document titled 'XYZ Lighting Co. Subcontractor Agreement'. The document is in 'Pending Approval' status. The 'Collaboration' tab is active. A 'Review Changes' dialog box is open over a colored edit in the 'Business Address' field. The dialog box has 'Accept' and 'Reject' buttons. The document content includes fields for 'Business Address', 'Phone Number', 'Email', and 'License Number', along with a 'Contract Term' section.

The screenshot shows the ONLYOFFICE interface for the same document. The 'Review Changes' dialog box is now closed. The document content is visible, including the 'Business Address' field which now contains the updated text: '130 7th Avenue, unit 149, New York, NY 10011New York, NY'. The 'Collaboration' tab remains active.

2a. Review counterpart edits (if applicable) - (4 of 6)

Quick Tip: After approving an edit, navigate to the “Collaboration tab”, select the approved edit, than insert a comment to inform the counterpart of this approval

The screenshot displays the ONLYOFFICE document editor interface. At the top, the document title is "XYZ Lighting Co. Subcontract Agreement" and the current document is "XYZ Lighting Co. Sub...". A "Pending Approval" badge is visible, along with a "Review completed" button. Below the title bar, there are tabs for "Variables", "General Contractor", "Counterpart", "Project", "Project owner", "Signatures", and "Render". The main toolbar includes options like "Co-editing Mode", "Add Comment", "Remove", "Resolve", "Track Changes", "Display Mode", "Previous", "Next", "Accept", "Reject", "Compare", and "Version History". The document content shows a "Subcontractor Contract" form with fields for "Business Address" (130 7th Avenue, unit 149, New York, NY 10011), "Phone Number" ((123) 456 - 7890), "Email" (test_contractor4@constrafor.com), and "License Number" (12345). A comment from "John Doe - ABC Const..." is visible on the right side, stating "The Company Address was updated" and "Add Reply". The status bar at the bottom indicates "Page 1 of 2", "All changes saved", and "English (United States)".

2a. Review counterpart edits (if applicable) - (5 of 6)

! Make sure to approve or reject **ALL** counterpart edits before sending the contract back to the counterpart for review.

Unresolved changes will be displayed on the final version of the contract.

Click on **Review completed** to send the contract for counterpart review.

The screenshot displays the ONLYOFFICE web interface for a document titled "XYZ Lighting Co. Subcontract Agreement". The document is in a "Pending Approval" state, created an hour ago. A blue button labeled "Review completed" is highlighted with a hand cursor. Below the document title, there are tabs for "Variables", "General Contractor", "Counterpart", "Project", "Project owner", "Signatures", and "Render". The main editing area shows a "Subcontractor Contract" form with the following details:

- As per the terms of this agreement, XYZ Lighting Co.
- Business Address: 130 7th Avenue, unit 149, New York, NY 10011
- Phone Number: (123) 456 - 7890
- Email: test_contractor4@constrafor.com
- License Number: 12345

Below the form, it states: "Subcontractor agrees to provide the services outlined in the contract below." and "Contract Term:". A comment bubble from "John Doe - ABC Const..." is visible on the right, stating "The Company Address was updated" and "Add Reply". The status bar at the bottom shows "Page 1 of 2", "All changes saved", and "English (United States)".

2a. Review counterpart edits (if applicable) - (6 of 6)

! The Contract Status will be changed from Pending Approval to Reviewed.

The screenshot displays a web-based contract review interface. At the top, the document title is 'XYZ Lighting Co. Subcontract Agreement', and the status is 'Reviewed' with a 'Created 2 hours ago' timestamp. Below the title, there are tabs for 'Variables', 'General Contractor', 'Counterpart', 'Project', 'Project owner', 'Signatures', and 'Render'. The main content area shows a document titled 'Subcontractor Contract' with the following text:

Subcontractor Contract

As per the terms of this agreement, XYZ Lighting Co.

Business Address: 130 7th Avenue, unit 149, New York, NY 10011

Phone Number: (123) 456 - 7890

Email: test_contractor4@constrafor.com

License Number: 12345

Subcontractor agrees to provide the services outlined in the contract below.

Contract Term:

The Contractor agrees to begin work on **03/08/2022**.

This contract applies to project **Building the World of Tomorrow** located at the following address:

None New York NY

A notification bubble on the right side of the document indicates: 'John Doe - ABC Const...' on 3/8/2022 at 7:31 pm, with the message 'The Company Address was updated'. The interface also includes a search bar, a sidebar with navigation icons, and a footer showing 'Page 1 of 2' and 'Zoom 100%'.

Counterpart can

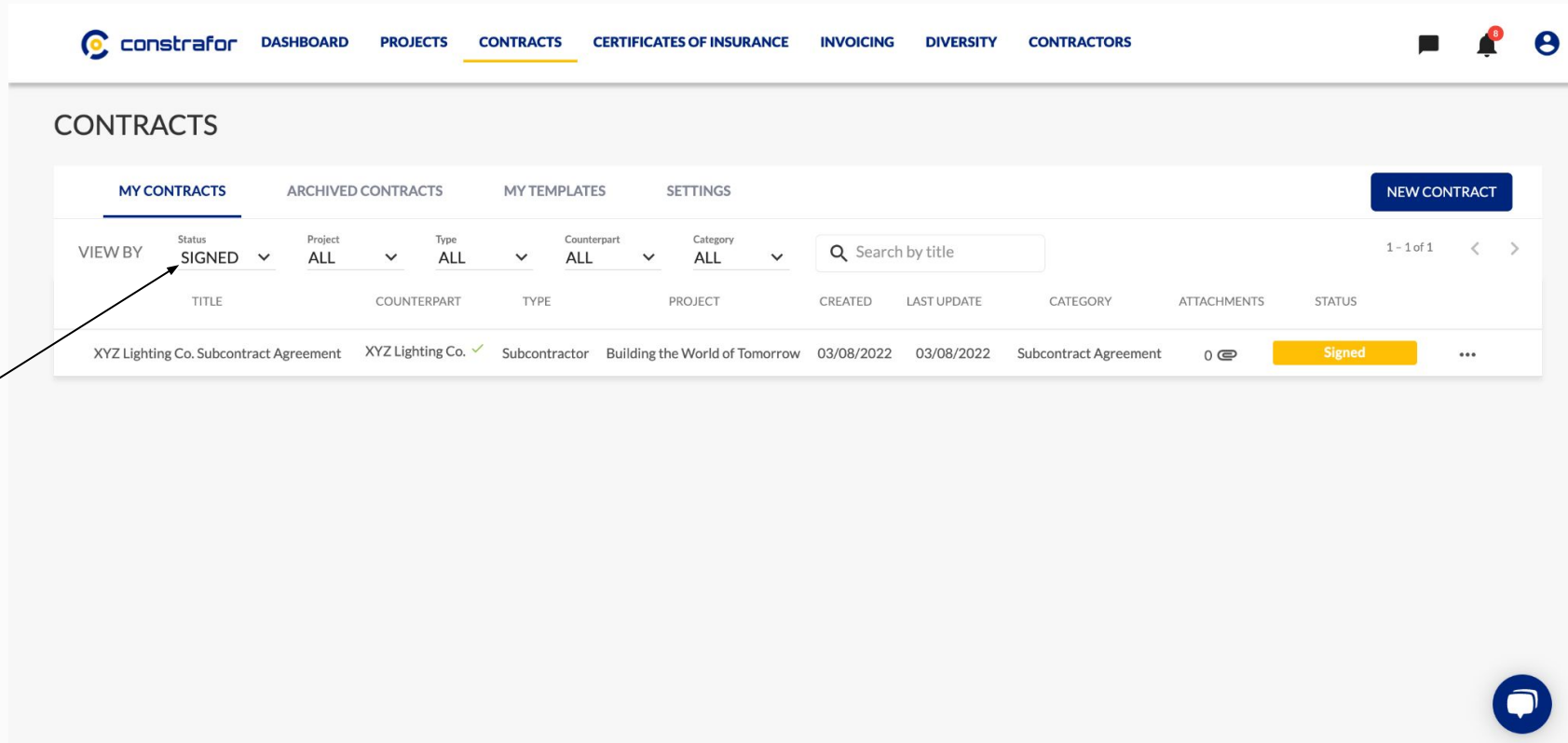
- Option 1: Negotiate the contract by suggesting modifications to the contract language
- Option 2: Sign the contract

3. Contract Execution - (1 of 3)

After the counterpart has signed, the contract status will change to **Signed** and is now pending the General Contractor signature.

General Contractor user(s) that has access to the contract will receive an email notification with link to contract

 Use filter bars to navigate through your Contracts list to locate contracts that include modifications pending your signature.



The screenshot shows the 'CONTRACTS' page in the Constrafor system. The navigation bar includes 'DASHBOARD', 'PROJECTS', 'CONTRACTS' (highlighted), 'CERTIFICATES OF INSURANCE', 'INVOICING', 'DIVERSITY', and 'CONTRACTORS'. The main content area has tabs for 'MY CONTRACTS', 'ARCHIVED CONTRACTS', 'MY TEMPLATES', and 'SETTINGS', along with a 'NEW CONTRACT' button. Below the tabs are filter bars for 'VIEW BY', 'Status' (set to 'SIGNED'), 'Project' (set to 'ALL'), 'Type' (set to 'ALL'), 'Counterpart' (set to 'ALL'), and 'Category' (set to 'ALL'). A search bar labeled 'Search by title' is also present. The table below shows a single contract entry:

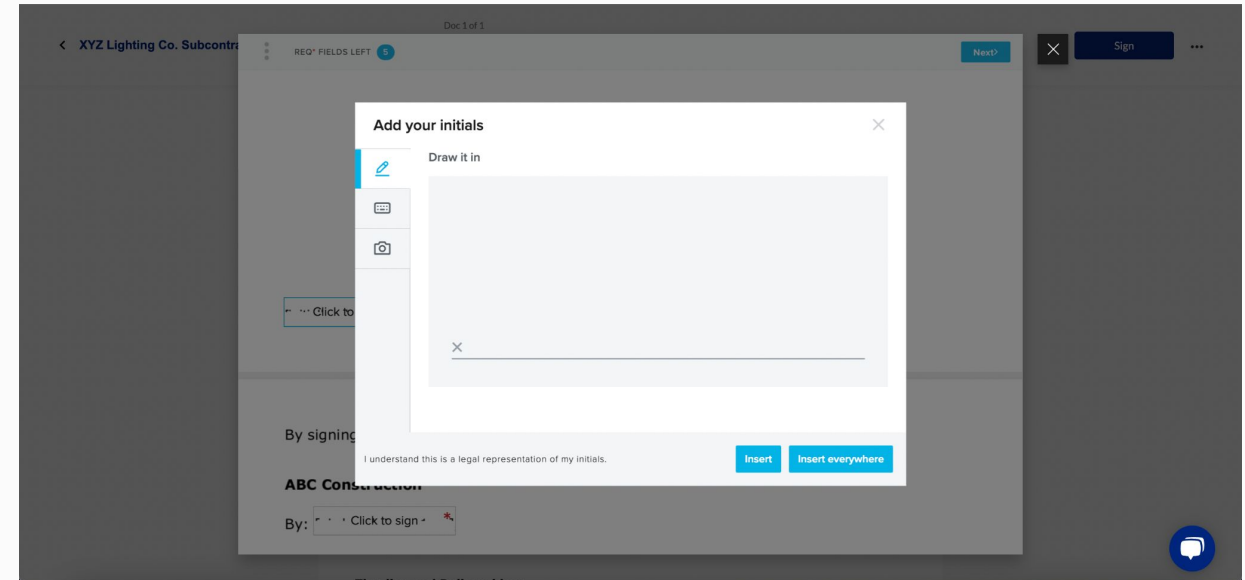
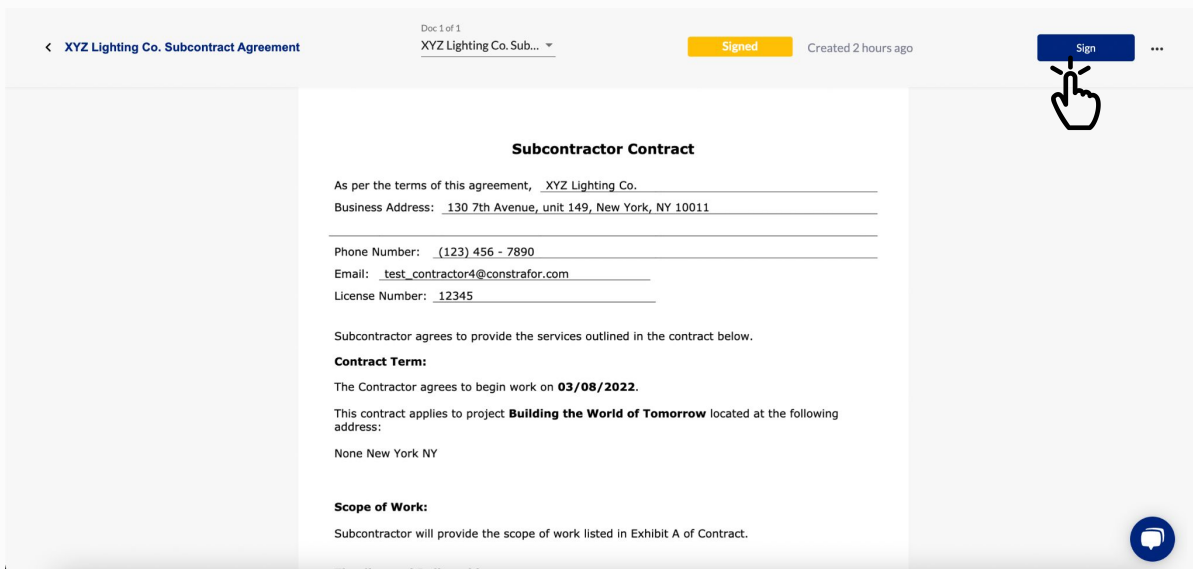
TITLE	COUNTERPART	TYPE	PROJECT	CREATED	LAST UPDATE	CATEGORY	ATTACHMENTS	STATUS
XYZ Lighting Co. Subcontract Agreement	XYZ Lighting Co. ✓	Subcontractor	Building the World of Tomorrow	03/08/2022	03/08/2022	Subcontract Agreement	0	Signed

*Filter bars assist with navigating through large sums of data.

3. Contract Execution - (2 of 3)

Click on **Sign** to countersign the contract.

You can draw, type or insert a picture to sign.



! Once you click “Sign”, you will be guided to electronically sign the document. A preview of the contract will be available before countersigning.

3. Contract Execution - (3 of 3)

Contract status will be changed from **Signed** to **Active**. A copy of the fully executed contract will be available on Constrafor to download along with any contract exhibit(s).

XYZ Lighting Co. Subcontract Agreement

Doc 1 of 1
XYZ Lighting Co. Sub...

Executed Created 2 days ago

Subcontractor Contract

As per the terms of this agreement, XYZ Lighting Co.

Business Address: 130 7th Avenue, unit 149, New York, NY 10011

Phone Number: (123) 456 - 7890

Email: test_contractor4@constrafor.com

License Number: 12345

Subcontractor agrees to provide the services outlined in the contract below.

Contract Term:
The Contractor agrees to begin work on **03/08/2022**.

This contract applies to project **Building the World of Tomorrow** located at the following address:
None New York NY

Scope of Work:
Subcontractor will provide the scope of work listed in Exhibit A of Contract.

Timeline and Deliverables:

- View Details
- Duplicate
- Save as Template
- Delete
- Version History
- Download Contract

GC “Action Required” by Status

Automated email reminder will be sent to users with “Action Required”

! General Contractor Action Required: Yellow color indicates an action is required from the GC

Counterpart Action Required: Blue color indicates an action is required from the counterpart

Status	Status Description	Action Required
Sent	Contract has been sent to Counterpart for Signature/Review	
Editing	Subcontractor is working on contract	
Pending Approval	Contract has been sent back from counterpart with Revisions	✓
Reviewed	GC has completed review, sent back to subcontractor	
Signed	Subcontractor has signed the contract	✓
Executed	The contract is fully executed	

Meet your Constrafor Team

Get in Touch



Brian Connor

Director of Customer Success
Brian.connor@constrafor.com

Ralph Maarawi

Customer Success Specialist
Ralph.maarawi@constrafor.com

Constrafor Support



Your go-to resource for all
things Constrafor

Available via Phone, Email and
Chat

Phone: +1 650-313-6165

Email: support@constrafor.com

constrafor Academy



Training and resources to help
you get acquainted with
Constrafor features and tools.

Coming soon!

Stay Connected

support@constrafor.com

Follow our Progress

www.constrafor.com

