

QUICK GUIDE

CREATE CONTRACT



CREATE A CONTRACT

1. Either from the Bid Package module select **Convert to Contract** or from the Contracts List press **+** then complete the details and press **Add**

2. On the Header tab complete the relevant details for the contract

3. Include any Contract Terms eg Inclusions, Exclusions, Warranty

4. Move to the Line Items tab and press the **+** icon to start adding the contract detail

5. Continue adding line items by selecting **Save & New** or once complete press **Save**

NOTE: It is possible to import contract line items if the detail already exists.

DELIVERY SCHEDULE

1. By Selecting **Save and Create Delivery Schedule** you can create a delivery program for the line item. This can include a further breakdown on the delivery of the items and any liquidated damages.

SCHEDULE OF VALUES

1. To provide a more granular level of detail to the contract you can also include a Schedule of Values. These can be displayed in Plan & Progress for onsite monitoring of completion.