Contracting Process

CCP USER GUIDE

Version 1.2
June 27, 2021

Date	Version	Changed By	Changes
June 10, 2021	Version 0.1	Maryna Nikolaienko	Original Version.
June 22, 2021	Version 1.0	Stephen Weiner	Edit for Format, English, and Grammar.
June 23, 2021	Version 1.1	Keith Brickey	Minor edits.
June 27, 2021	Version 1.2	Maryna Nikolaienko	- Added links to quickly navigate the document; - Document converted to PDF file format.

Table of Contents

User CCP Workflow

This article provides a user guide for the CCP Process that uses the K2 Five application framework. The CCP application consists of two desktops:

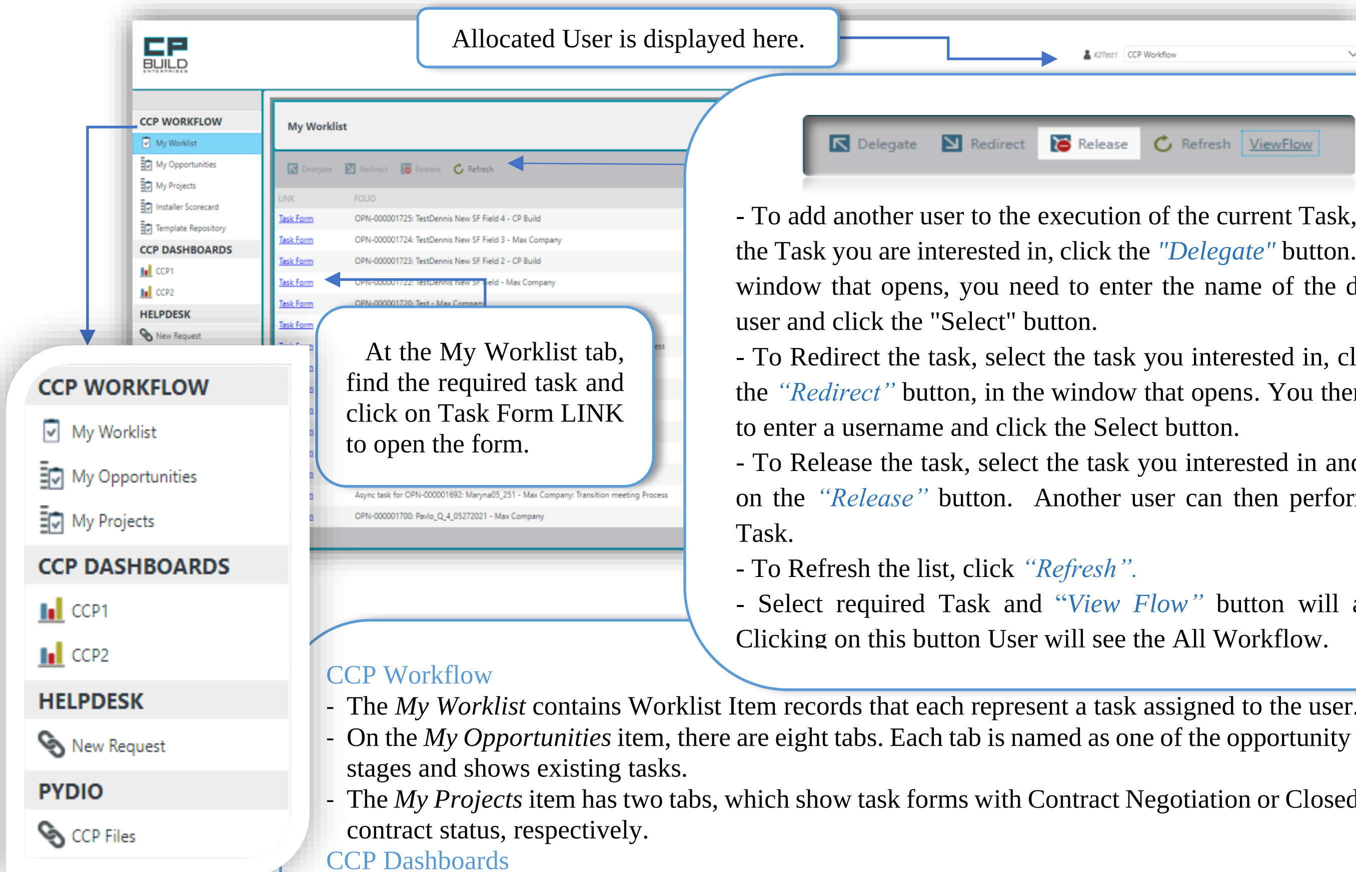
- CCP workflow
- Configuration management

In the upper right corner of the header, there is a drop-down list for selecting a desktop. Left menu items and dropdown items are limited to restrict visibility to selected role members.

My Worklist

In this section, we will look at working with the CCP Workflow.

The CCP Workflow menu for the user has four sections: CCP Workflow, CCP Dashboards, Helpdesk and Pydio.



- To add another user to the execution of the current Task, select the Task you are interested in, click the *"Delegate"* button. In the window that opens, you need to enter the name of the desired user and click the "Select" button.
- To Redirect the task, select the task you interested in, click on the *"Redirect"* button, in the window that opens. You then need to enter a username and click the Select button.
- To Release the task, select the task you interested in and click on the *"Release"* button. Another user can then perform this Task.
- To Refresh the list, click *"Refresh"*.
- Select required Task and *"View Flow"* button will appear Clicking on this button User will see the All Workflow.

CCP Workflow

- The *My Worklist* contains Worklist Item records that each represent a task assigned to the user.
- On the *My Opportunities* item, there are eight tabs. Each tab is named as one of the opportunity status stages and shows existing tasks.
- The *My Projects* item has two tabs, which show task forms with Contract Negotiation or Closed Won contract status, respectively.

CCP Dashboards

- On the CCP 1 item, there is a form with dashboard, which shows short information about existing user tasks, sorted by opportunity status.
- The form on the CCP 2 item shows short information about tasks sorted by contract status.

Helpdesk

- New Request will redirect you to Bytezoom Help Center, where you can submit a request or report a problem.

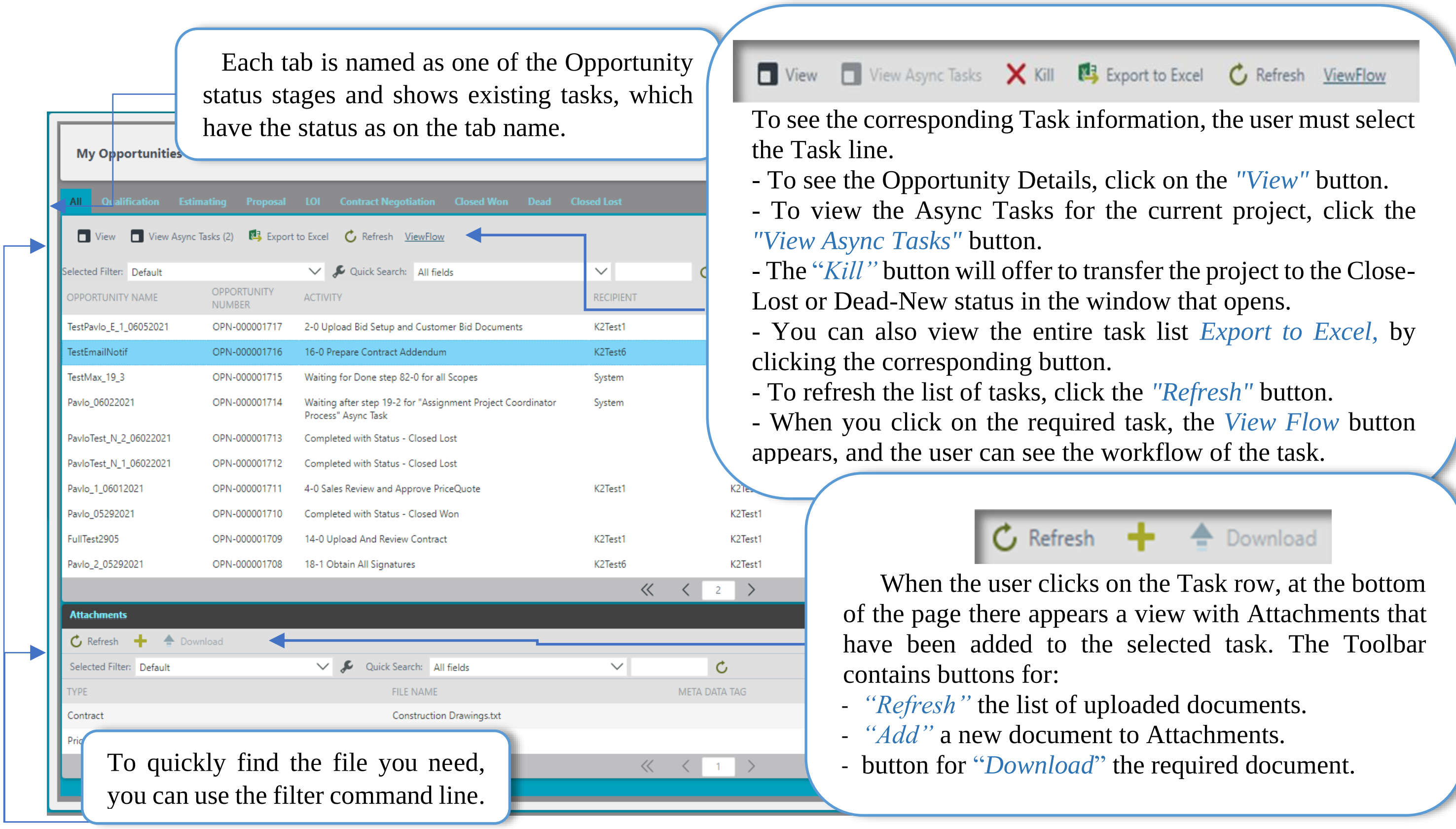
Pydio

- You will be redirected to the Pydio page, where you can open your personal folder.

Screen shot - CCP Workflow – My Worklist

My Opportunities

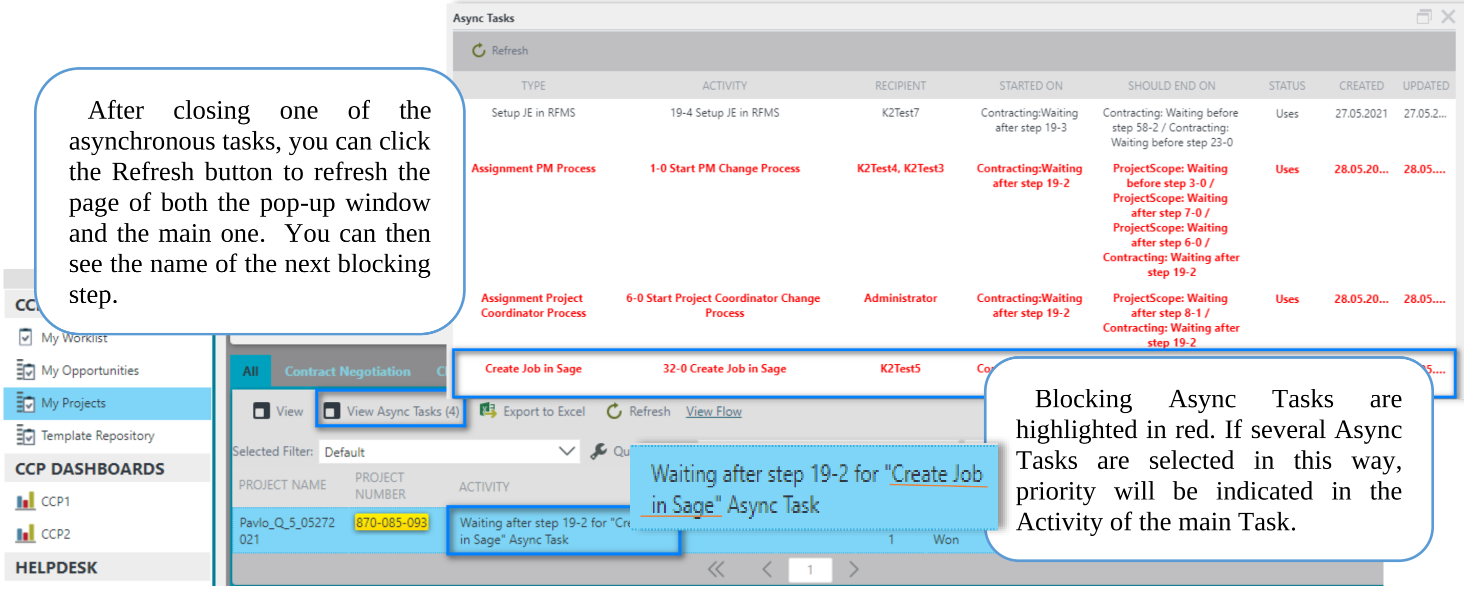
On the My Opportunities item, there are eight tabs: All, Qualification, Estimating, Proposal, LOI, Contract Negotiation, Closed Won, Dead and Closed Lost. On the All tab, we can see the following data: Opportunity name, Opportunity number, Activity, Recipient, Sales owner, FDD, Stage, Customer, Type, Created and Updated. All other tabs will display the tasks with the corresponding Title Stage.



Screen shot - CCP Workflow – My Opportunities

View Async Task

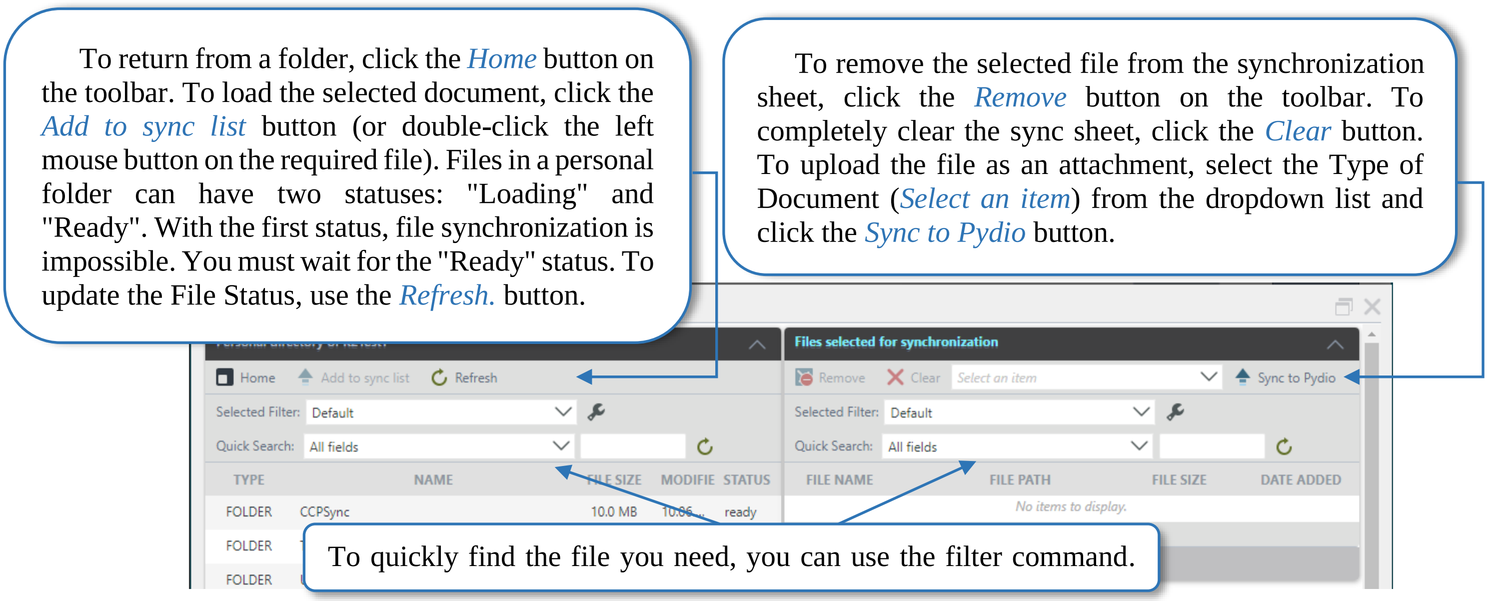
While working with a Task, you will see similar messages - "Waiting after Step 19-2 "Create Job in Sage" Async Task" - in Activity on the My Opportunities and My Projects tabs. This means that a started asynchronous step blocks further progress of the Task and must be closed.



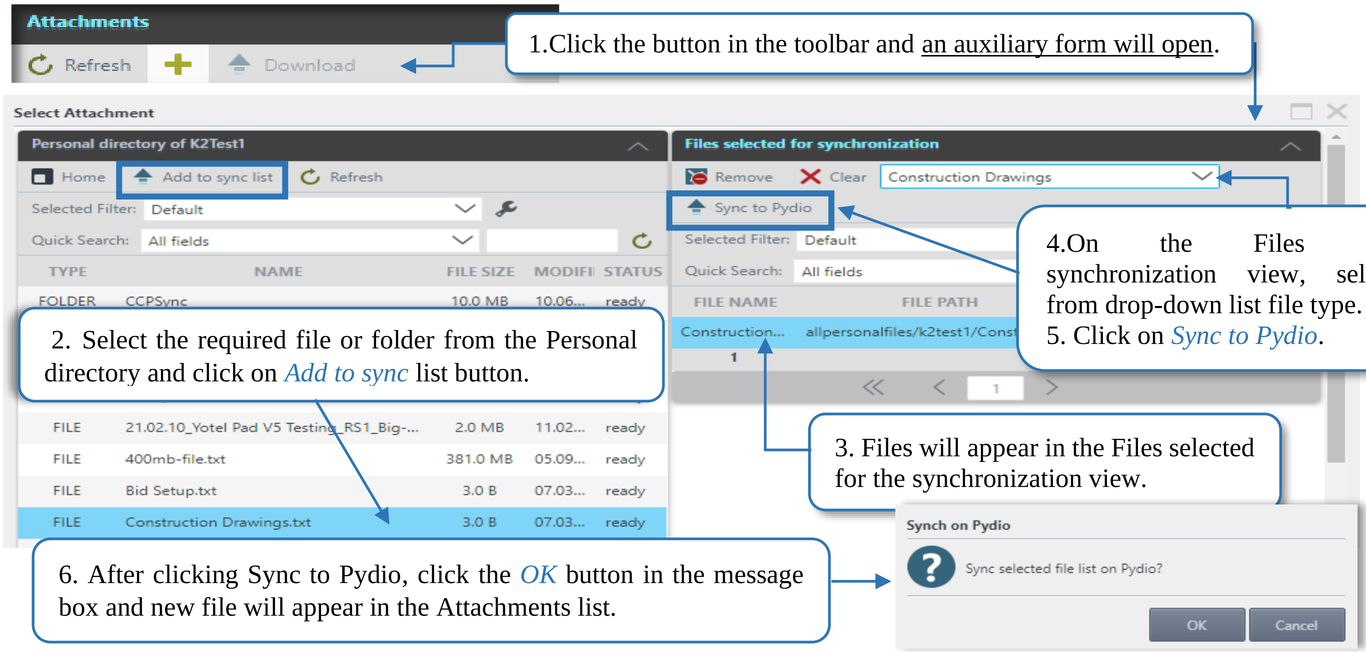
Screenshot - CCP Workflow – Button View Async Tasks

Upload file in the Attachment list

When adding a file using this method, an additional window opens.

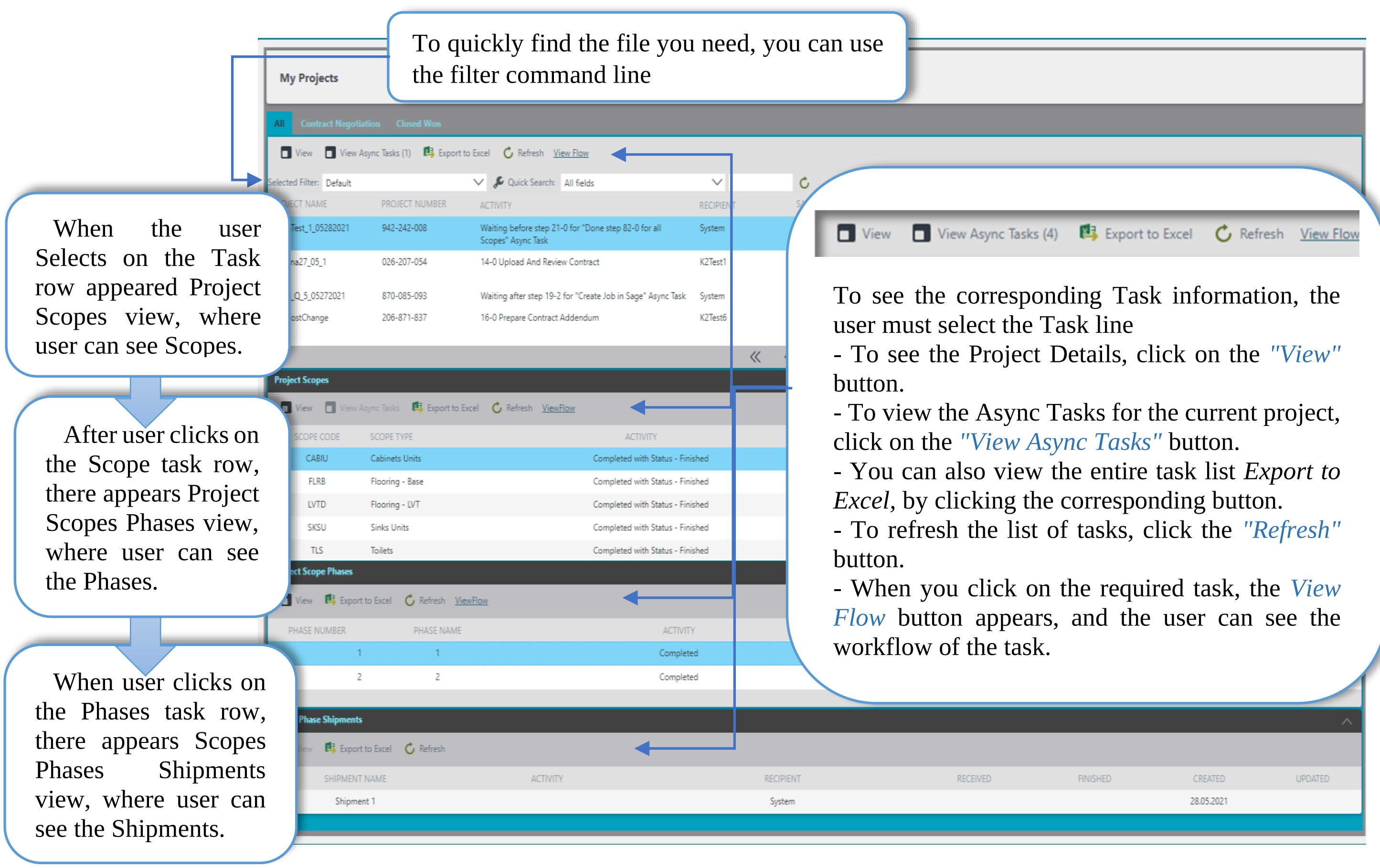


To add new attachment to Attachment's view:



My Projects

The My Projects item has three tabs, which show task forms with All, Contract Negotiation or Closed Won contract status, respectively.

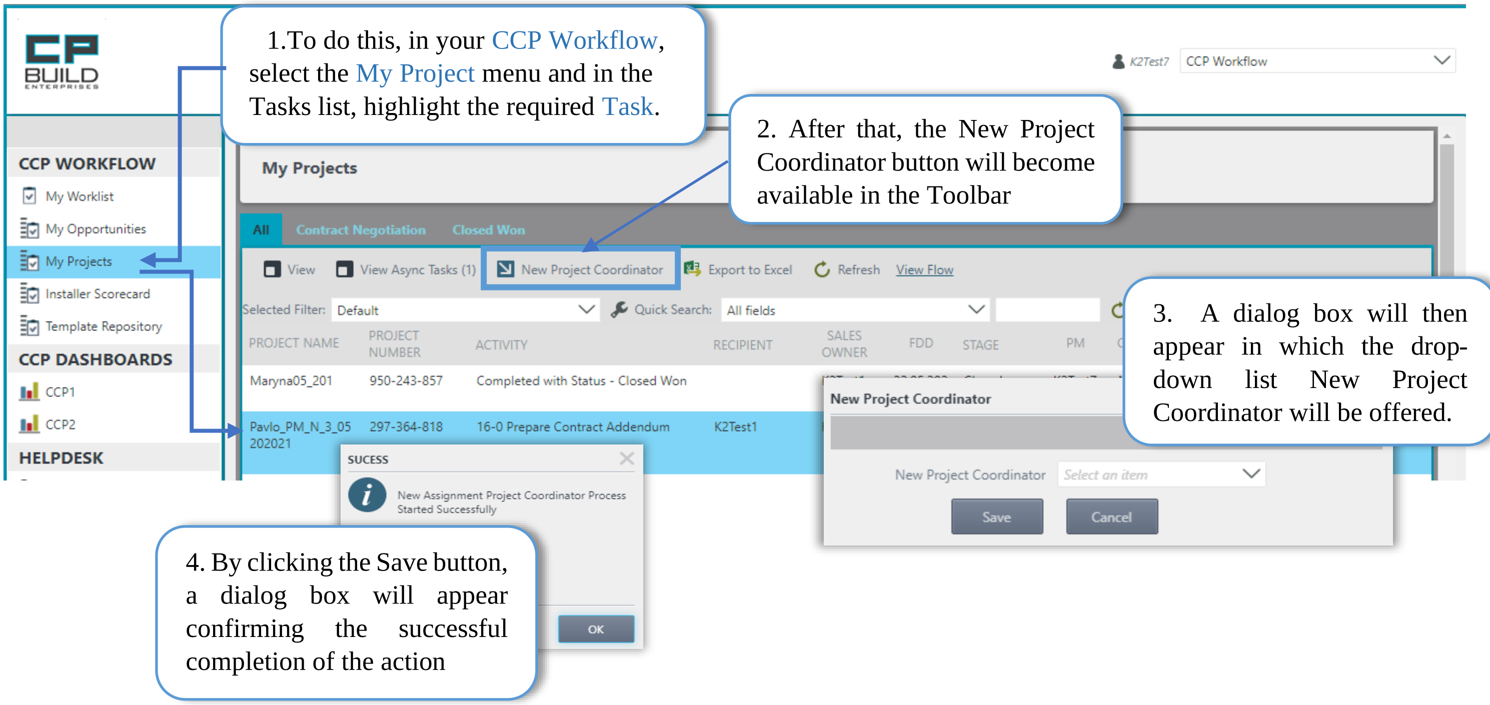


Screenshot - CCP Workflow – My Projects

Additional role features

New Project Coordinator

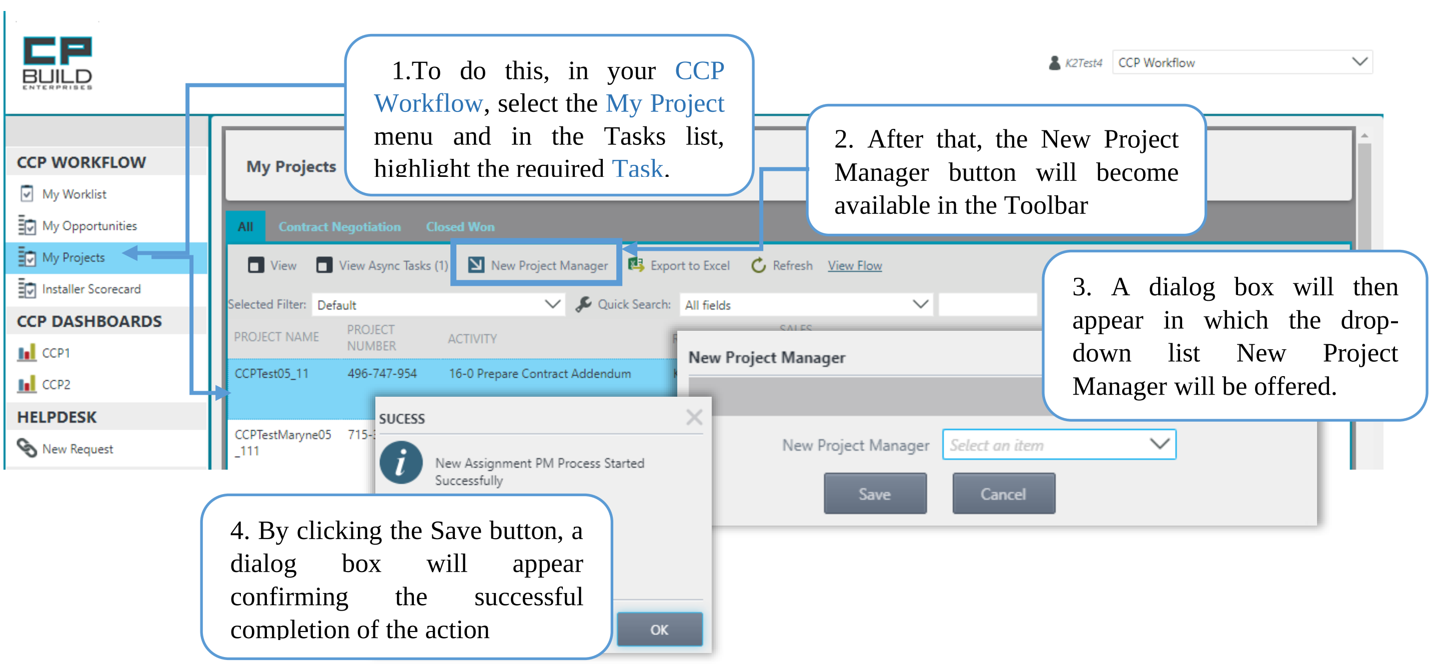
The Project Coordinator Manager can initiate the New Project Coordinator assignment process using the New Project Coordinator button on the My Project menu.



Screenshot - CCP Workflow – My Projects- New Project Coordinator

New Project Manager

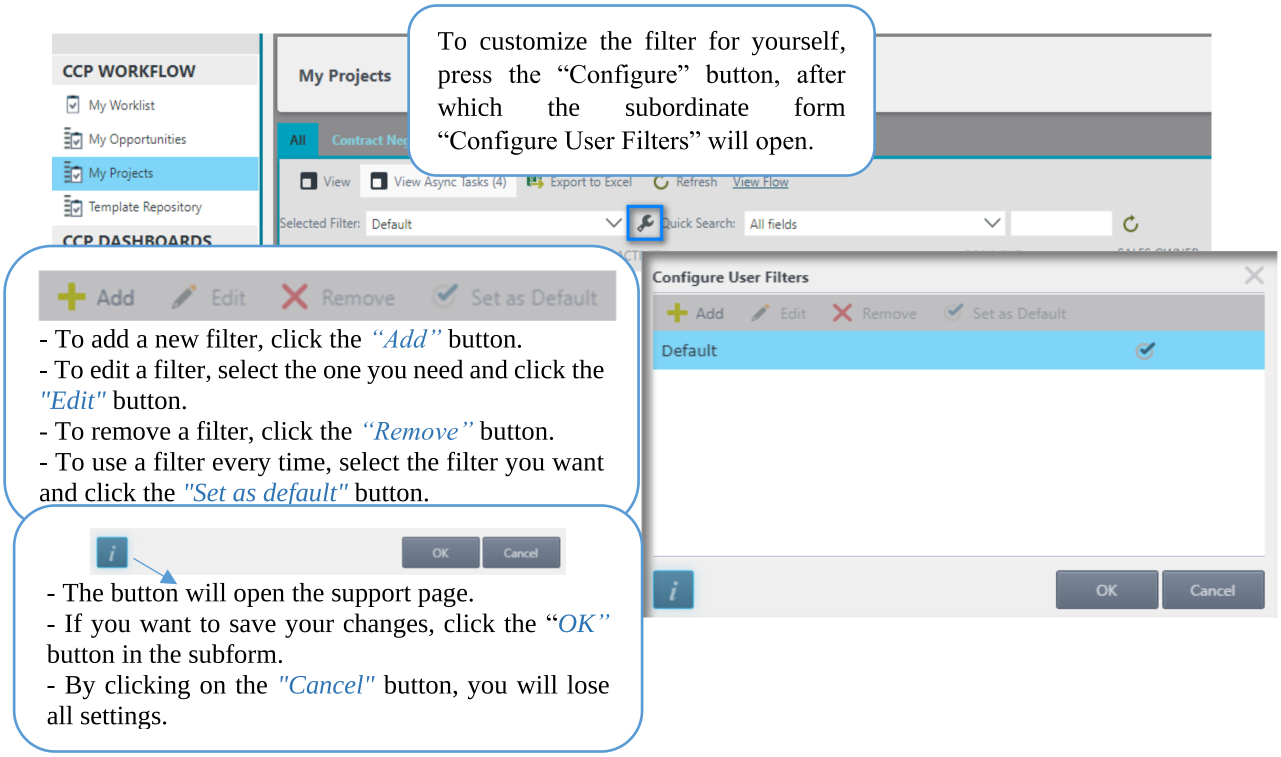
The Operations Manager can initiate the New Project Manager assignment process using the New Project Manager button on the My Project menu.



Screenshot - CCP Workflow – My Projects- New Project Manager

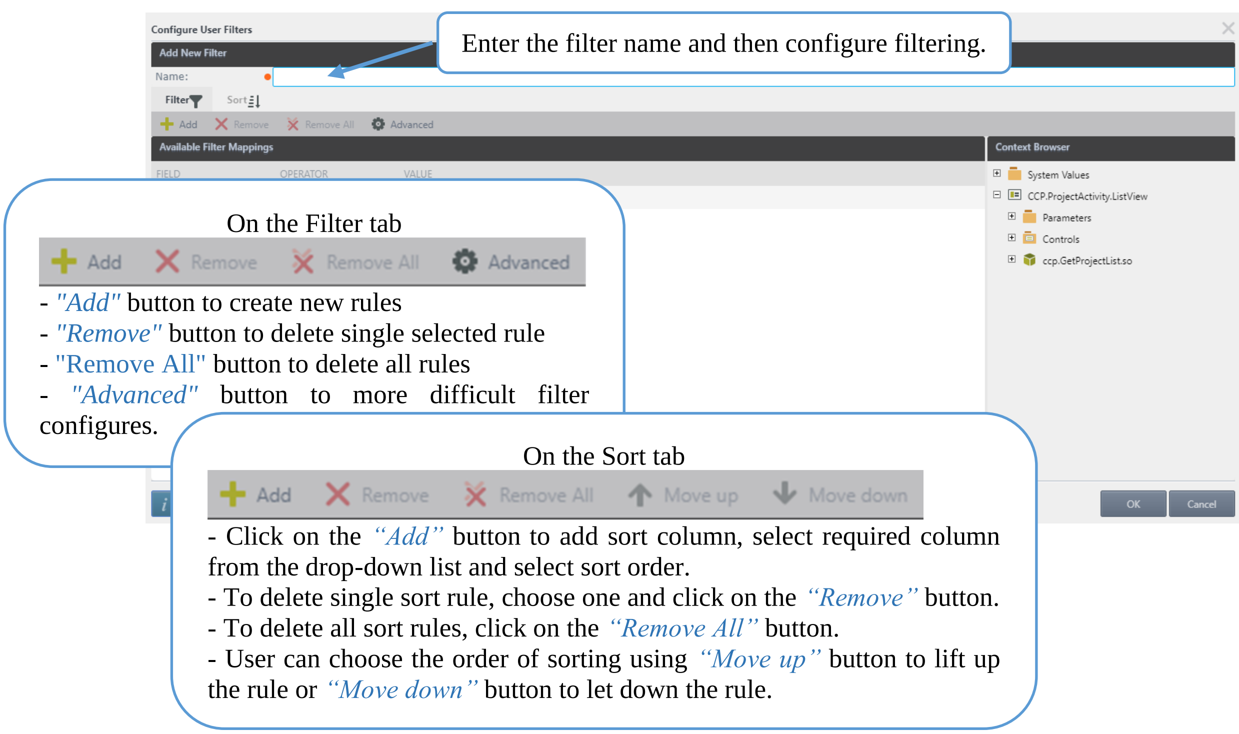
Filtering

On the CCP Workflow, User can use different filtering and quickly search relevant tasks. The User can use filtering by default or configure their own filtering.



Screen shot - CCP Workflow – Configure User Filters

After clicking on the Add button on the Configure User Filters subform, a new Configure User Filters subform will open. There are two tabs on the Configure User Filters sub-form: Filter and Sort.



Screenshot - CCP Workflow – Configure User Filters

Overview Tabs for Contracting Process

The Contracting Process is interconnected with Sales Force and transfers the following statuses, which are set at the appropriate steps:

- Qualification after Start Process
- Estimating after Step 2-0 Upload Bid Setup and Customer Bid Documents
- Proposal after Step 4-3 Send Quotation PDF to customer
- LOI after Step 5-0 Upload LOI\NTP or Revised Bid Setup
- Contact Negotiation after Step 5-2 Agree to Move Forward
- Closed Won after Step 19-2 Review Countersigned Contract

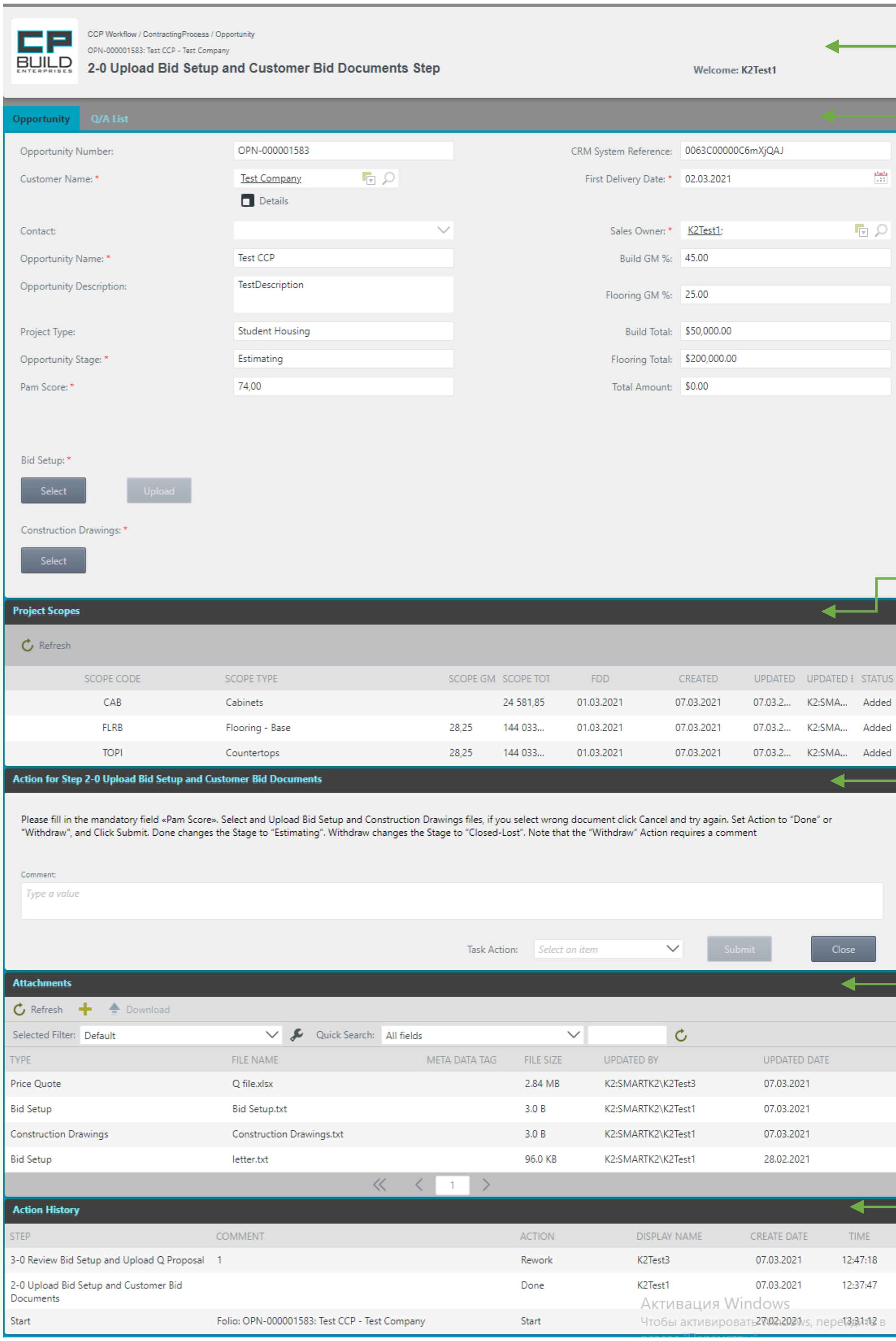
Form images and descriptions

In the form for the Contracting Process, there are eight tabs (Opportunity, Include / Exclude, Q / A List, Approval Notes, Project, Contract Review, Contract Information and Procore Project) that are active at certain steps.

From the beginning of the start of the Contract Process, two tabs are available to us for work: Opportunity and Q / A List. Tab Include / Exclude becomes available after uploading the Quotation file in Step 3-0 Review Bid Setup and Upload Q Proposal Step. Tab Approval Notes becomes available in Step 4-0 Sales Review and Approve Price Quotation. At Step 14-0 Upload and Review Contract, the following tabs become available Project, Contract Review, Contract Information. Tab Procore Project becomes available in Step 22-0 Procore Submittals Approved.

Tab Opportunity

On the Opportunity tab, some fields are already filled in automatically with information from Sales Force. All of the other fields will be filled in automatically after uploading documents, which will contain this information, or manually by the user.



Header section, which displays current information about process name, project name and step number with its name and username.

This is the main user's work area in which tabs, fields with data information and a block for uploading the necessary documents for a specific step are available.

This part of the window displays the loaded Scopes from the Quotation Files.

Action to represent a step. The user can enter a comment and select an action from the Task Action drop-down list. The user can also see a hint for the current step in the form of a description of the required actions and a link to a schematic representation of a step in the overall process.

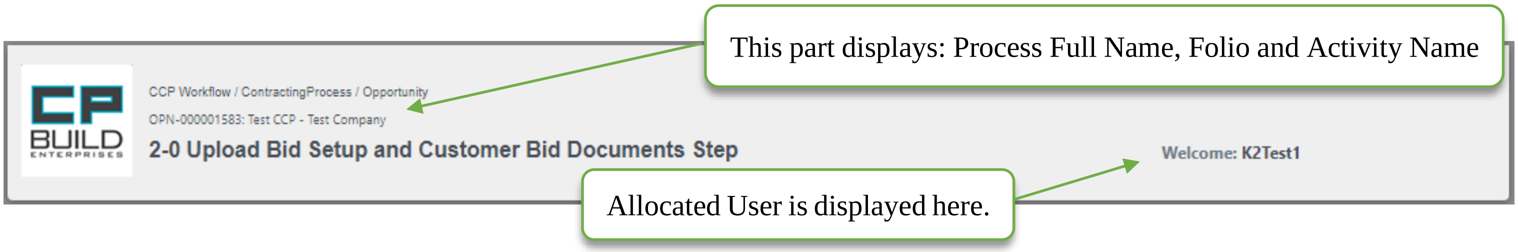
On the Attachment view you may see added attachments, download them, or add a new one.

Action History view shows step name, comment, action, display name, date and time for activity in previous steps.

Screenshot - Sales – Step 2-0 Upload Bid Setup and Customer Bid Documents – Contracting Process

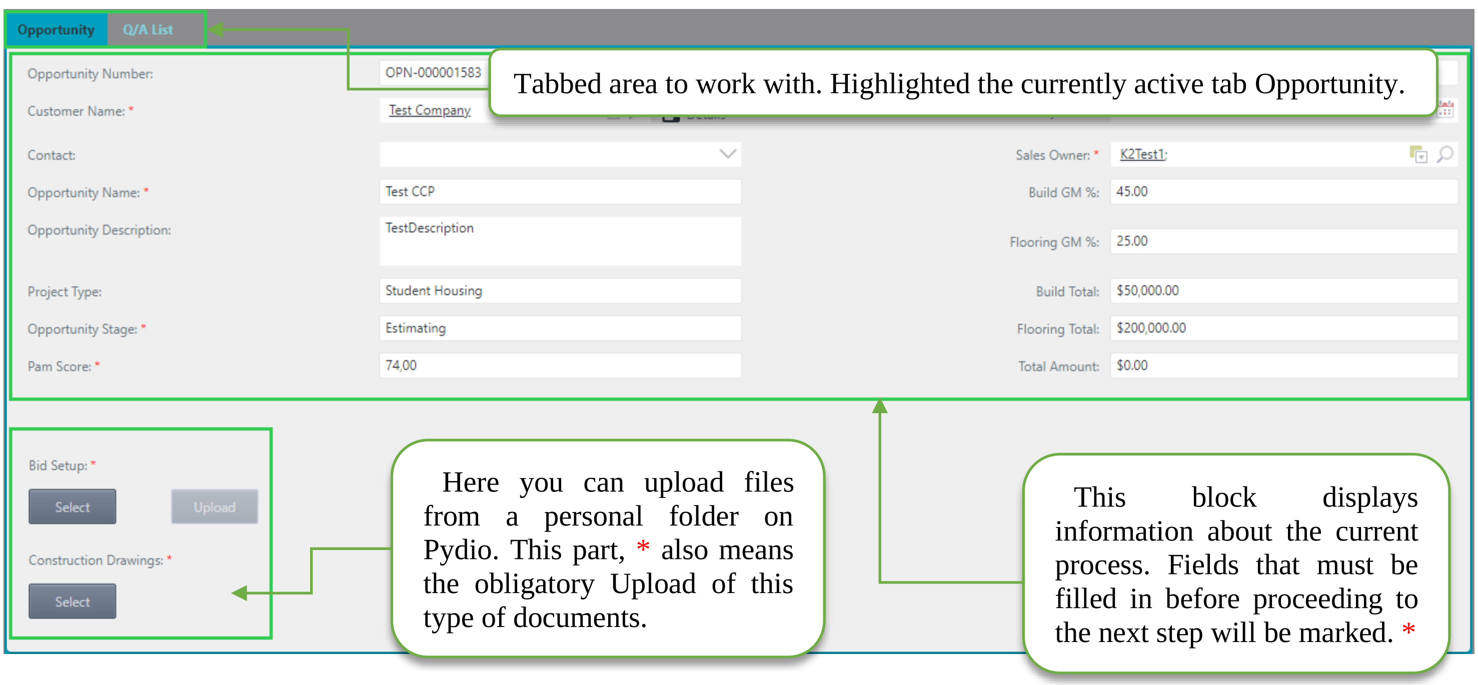
Header section

This area is displayed at each step and is the same for all tabs. This area is informative and is not changed by anyone.



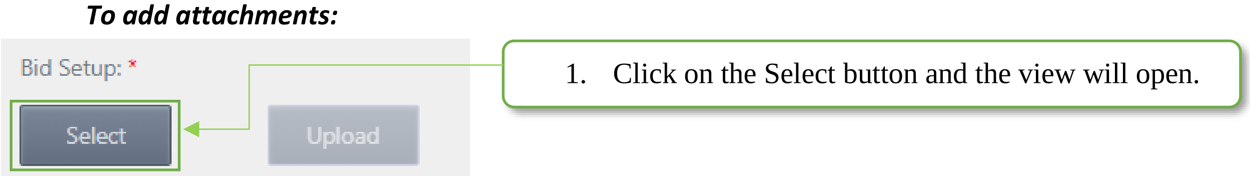
Opportunity

There are three active parts in this area: the upper part shows the available tabs to work with; in the middle part there are fields for viewing project data transferred from Sales Force, extracted from uploaded files, and manually entered by the user; and the third part is also available to upload the necessary documents for this contract. Some fields will be hidden or added for a specific step.

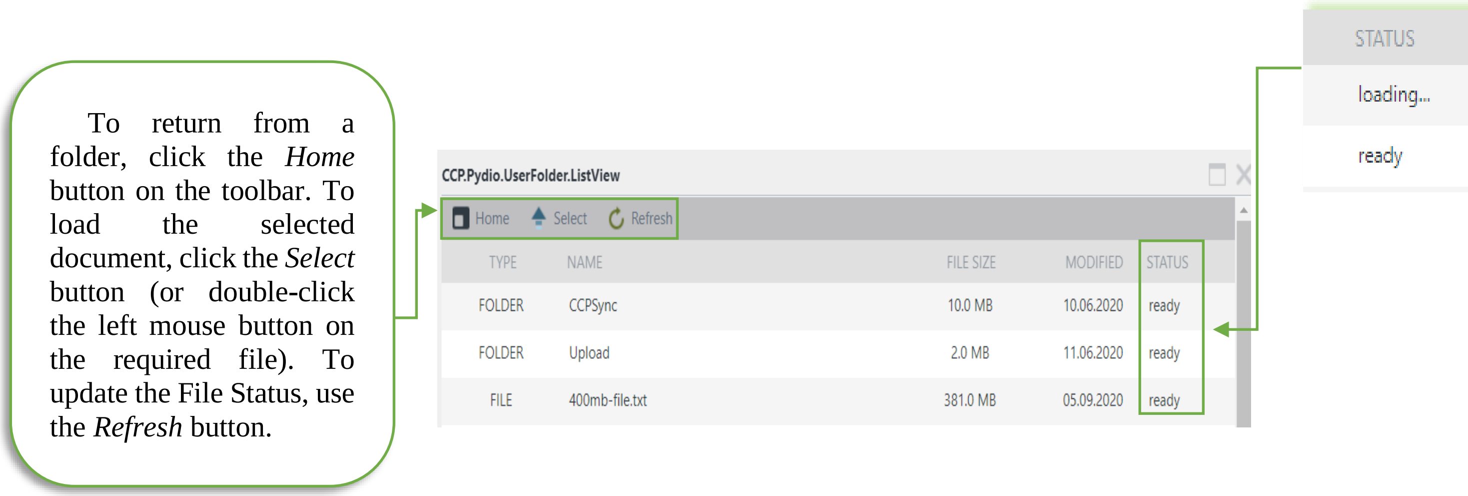


Screenshot – Opportunity tab – Contracting Process

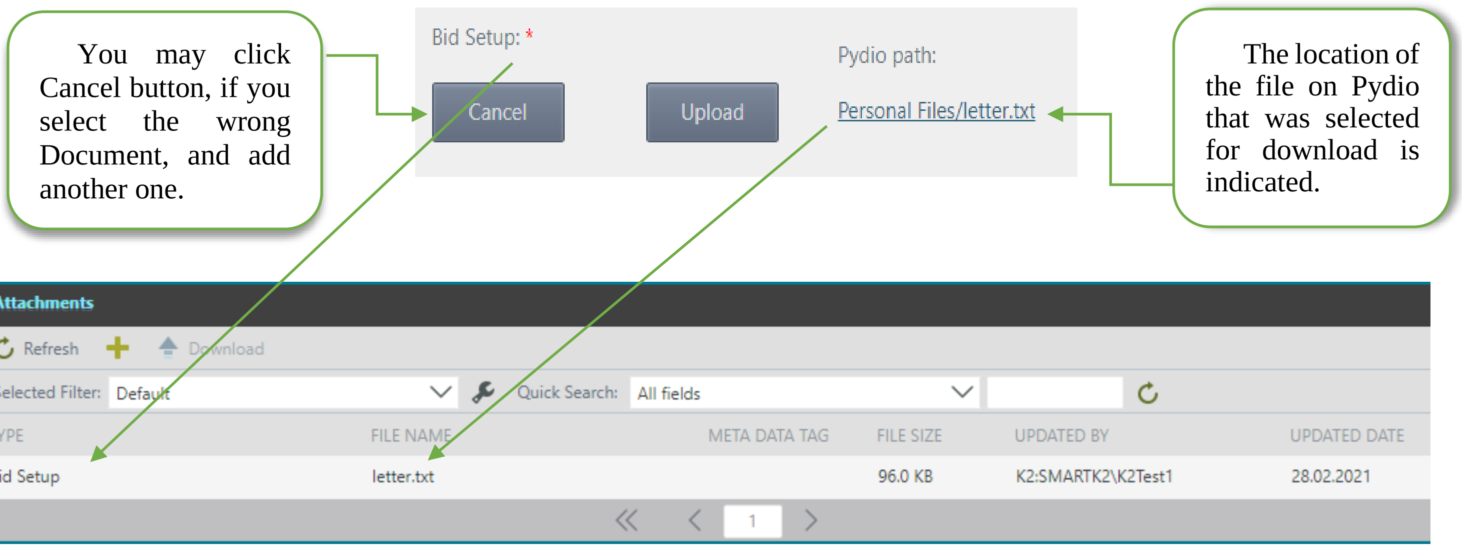
To add attachments:



2. Choose the file user need and click on the Select button ad. This action will add the document to the form.



3. Click "Upload" to upload the file. If user do not do it yourself, it will be done automatically after selecting Task Action and clicking "Submit".



After clicking the Upload button, the selected file will be displayed in the Attachments and Saved as Attachment in Process.

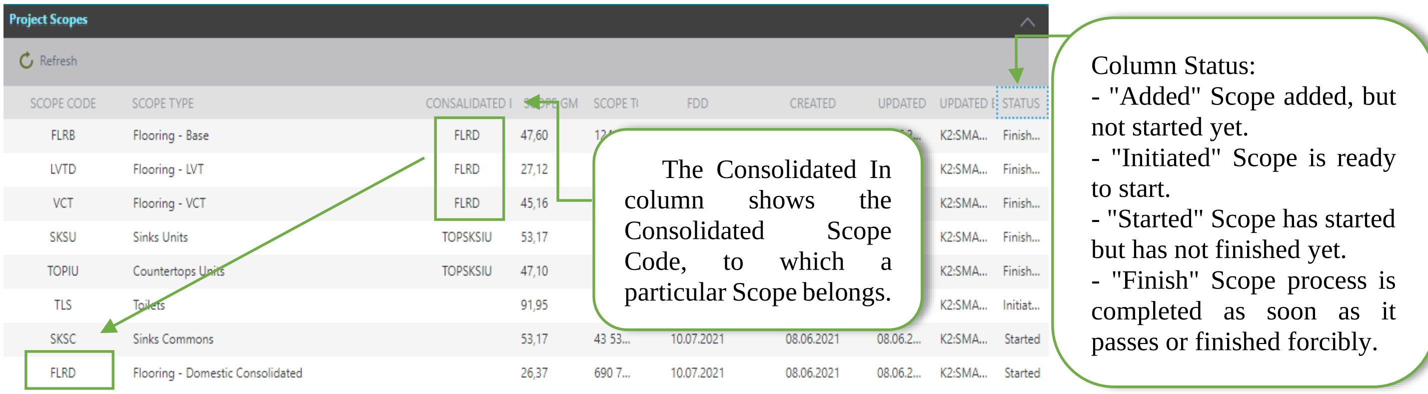
Project Scope

The current version of the project supports the 5th version templates of the Quotation files. If the user tries to load a Quotation file of a different version, the system will display a warning.

This part of the window displays the loaded scopes from the Quotation Files. Quotation Files are loaded in steps:

- 3-0 Review Bid Setup and Upload Q Proposal.
- 4-2 Prepare Quotation PDF.
- 6-0 Upload New or Revised L Proposal.
- 14-1 Upload C Proposal and SOV.
- 19-3 Upload CA Proposal.
- 23-2 RS Proposal.

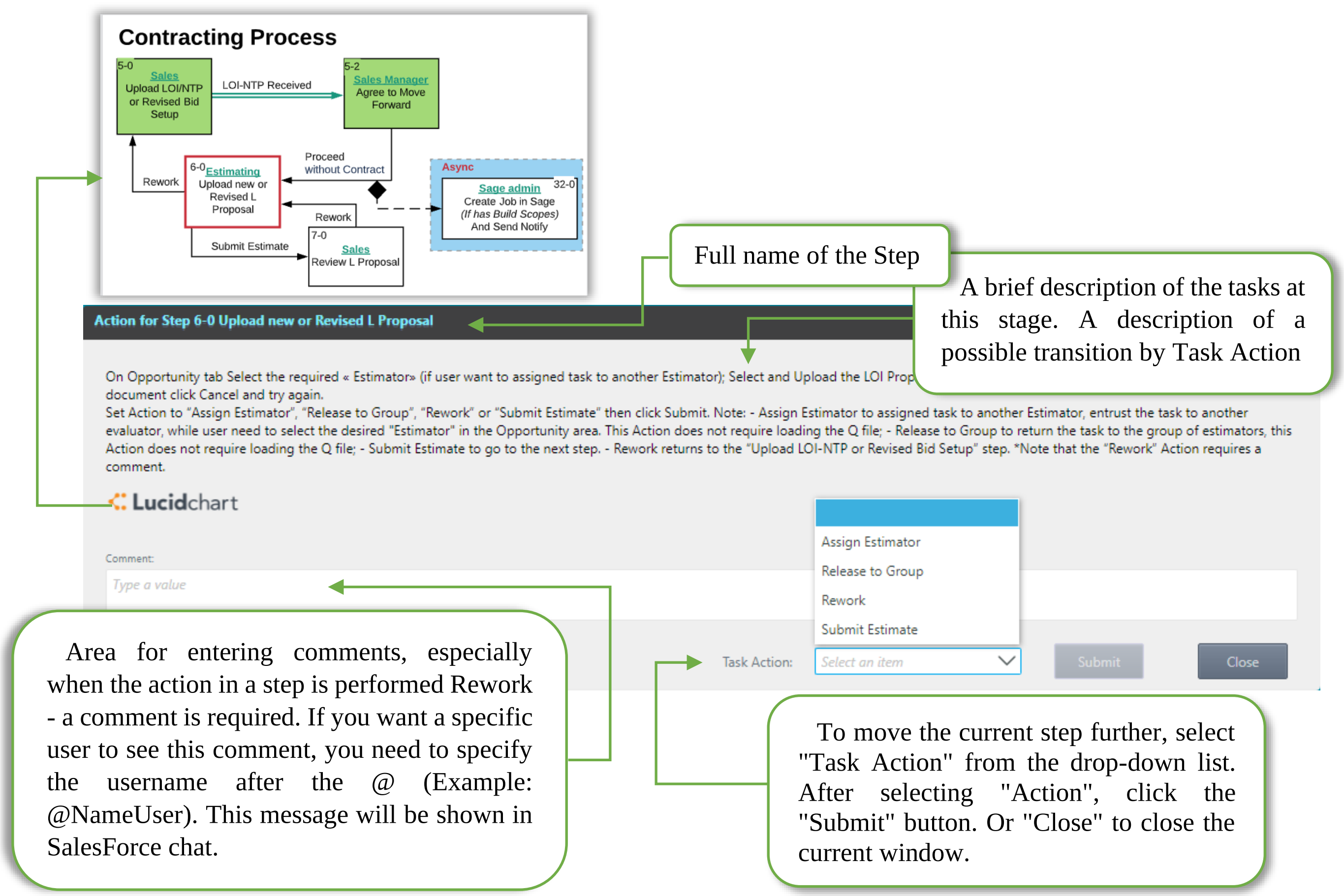
After uploading these files, the corresponding data is updated. This area becomes visible in the 3-0 Review Bid Setup and Upload Q Proposal, provided that the Upload button was clicked when the Q File was loaded.



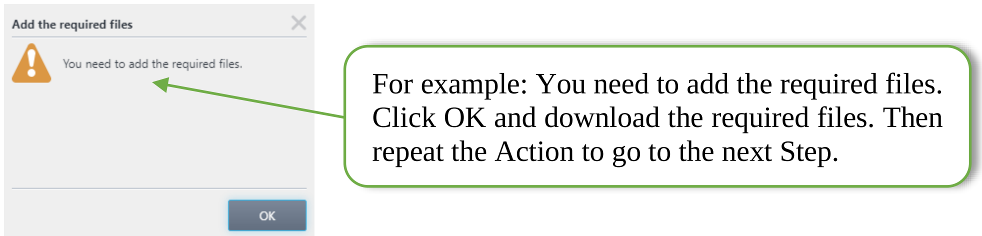
After uploading the file, the Project Scope data is updated automatically. When you Upload a Quotation file with updated Scopes List data in which the Total Amount of any previously launched Scope is Null -this Scope Instance will be automatically finished.

Action for Step

This part gives a short description of the current step: its name; it describes the actions that need to be performed; lists the documents that need to Upload; and describes the Task Action.

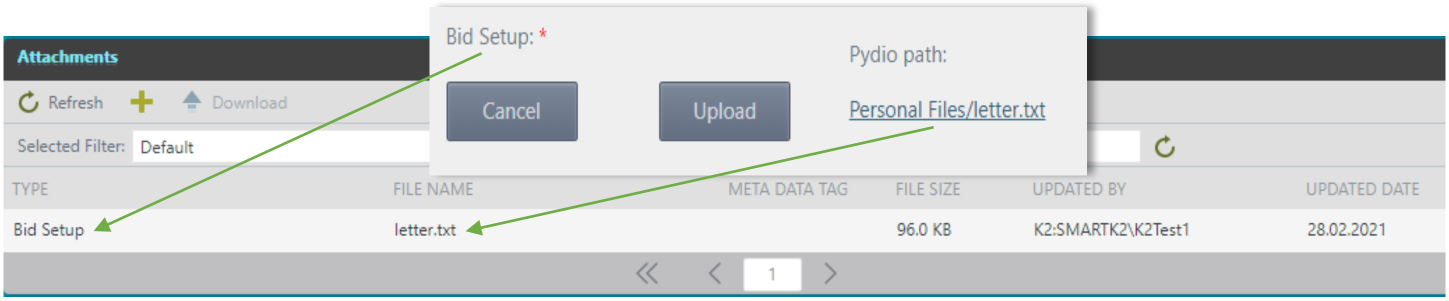


If user clicks Submit without completing all the required tasks for the current step, the user will see a warning window containing a message stating what else needs to be done.

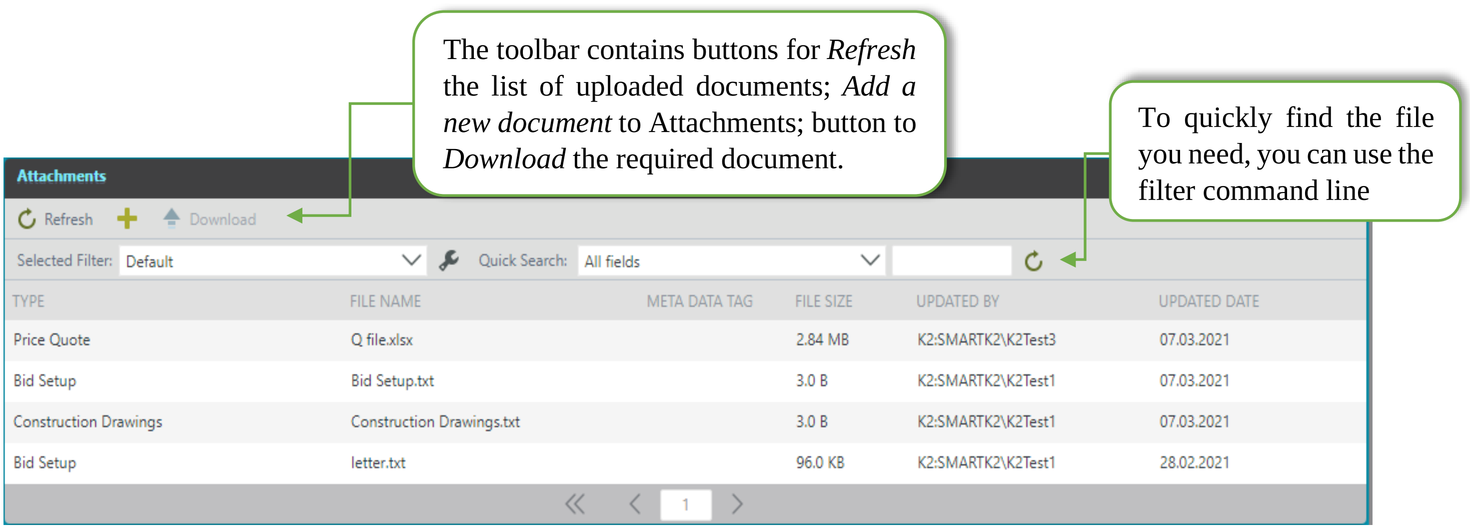


Attachments

This section shows all the documents that were uploaded in the previous steps. The command line provides additional options to Upload and Download the selected document.



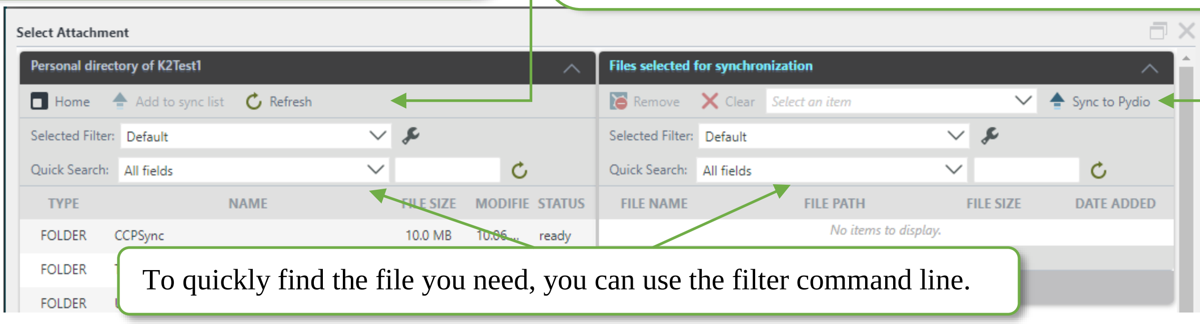
After clicking the Upload button, the selected file will be displayed in the Attachments and Saved as Attachment in Process. In the Attachment view, the user may see added attachments and can download them or add a new one.



When adding a file using this method, an additional window opens.

To return from a folder, click the *Home* button on the toolbar. To load the selected document, click the *Add to sync list* button (or double-click the left mouse button on the required file). To update the File Status, use the *Refresh* button.

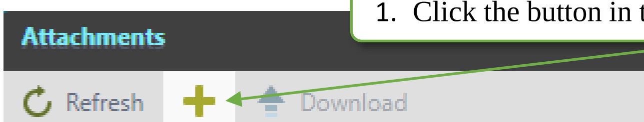
To remove the selected file from the synchronization sheet, click the *Remove* button on the toolbar. To completely clear the sync sheet, click the *Clear* button. To download the file as an attachment, *select an item* from the dropdown list and click the *Sync to Pydio* button.

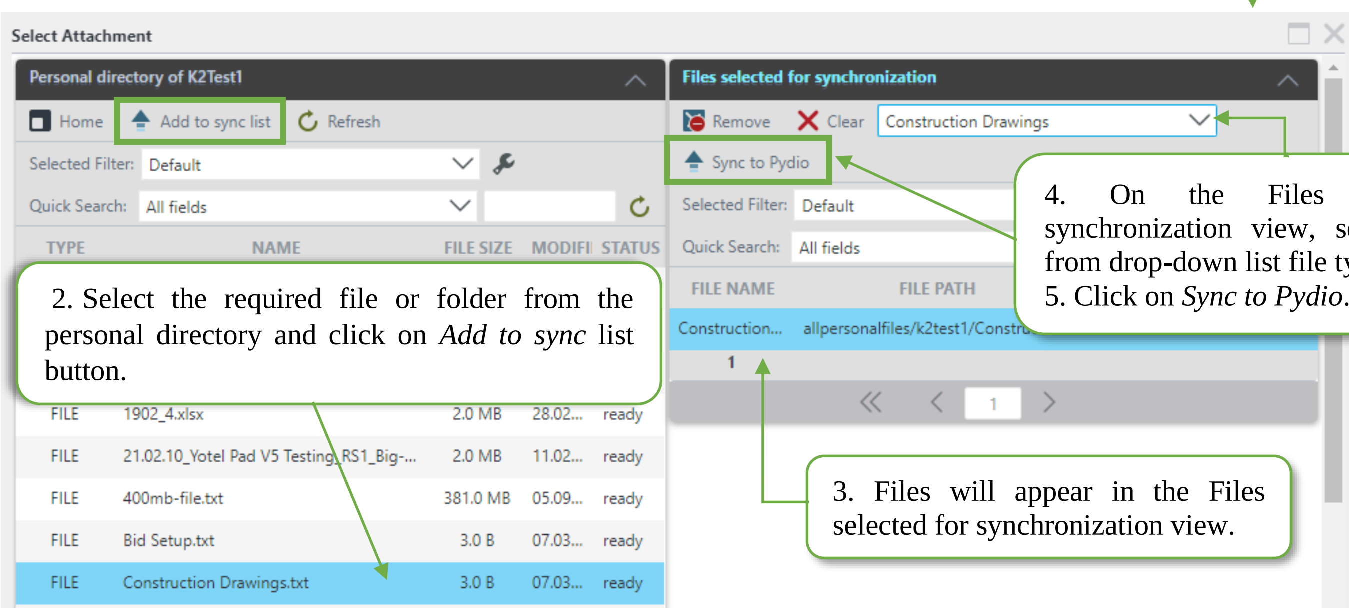


To quickly find the file you need, you can use the filter command line.

To add new attachment to Attachment's view:

1. Click the button in the toolbar and an auxiliary form will open.



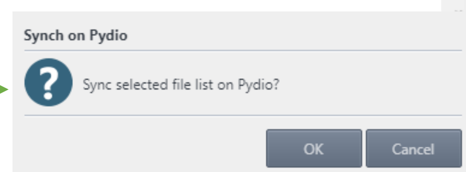


2. Select the required file or folder from the personal directory and click on *Add to sync* list button.

3. Files will appear in the Files selected for synchronization view.

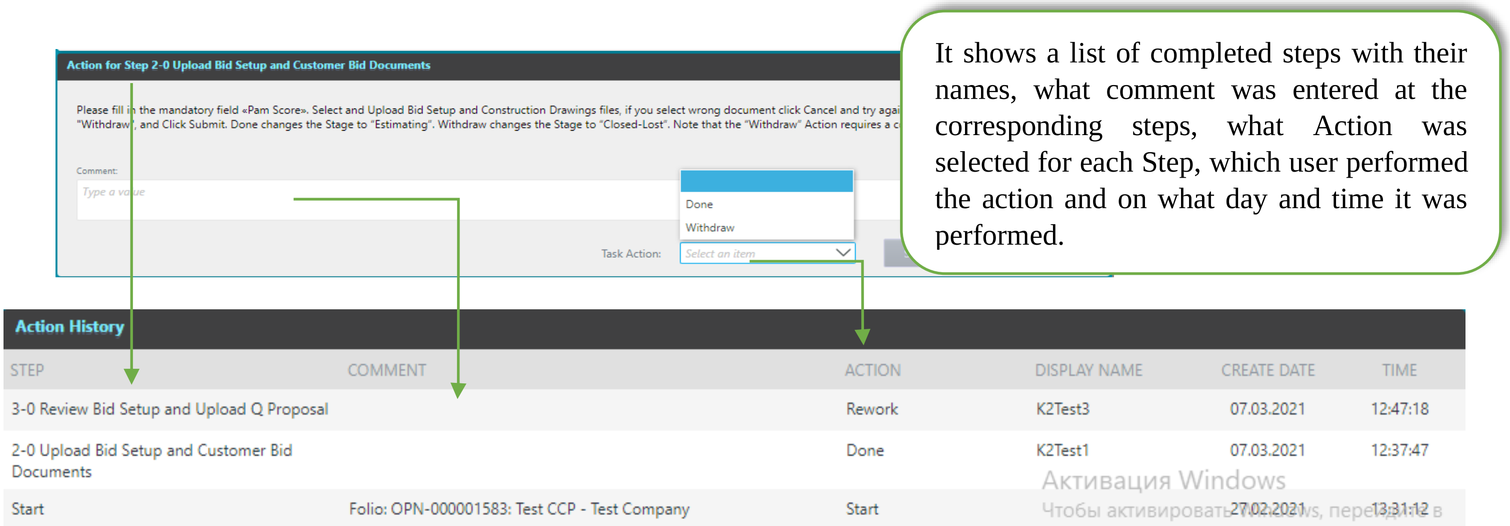
4. On the Files for synchronization view, select from drop-down list file type.
5. Click on *Sync to Pydio*.

6. After clicking Sync to Pydio, click the *OK* bottom in the message box and a new file will appear in the Attachments list.



Action History

This area is displayed at each step in the Opportunity tab. This area is informative and is not changed by anyone.

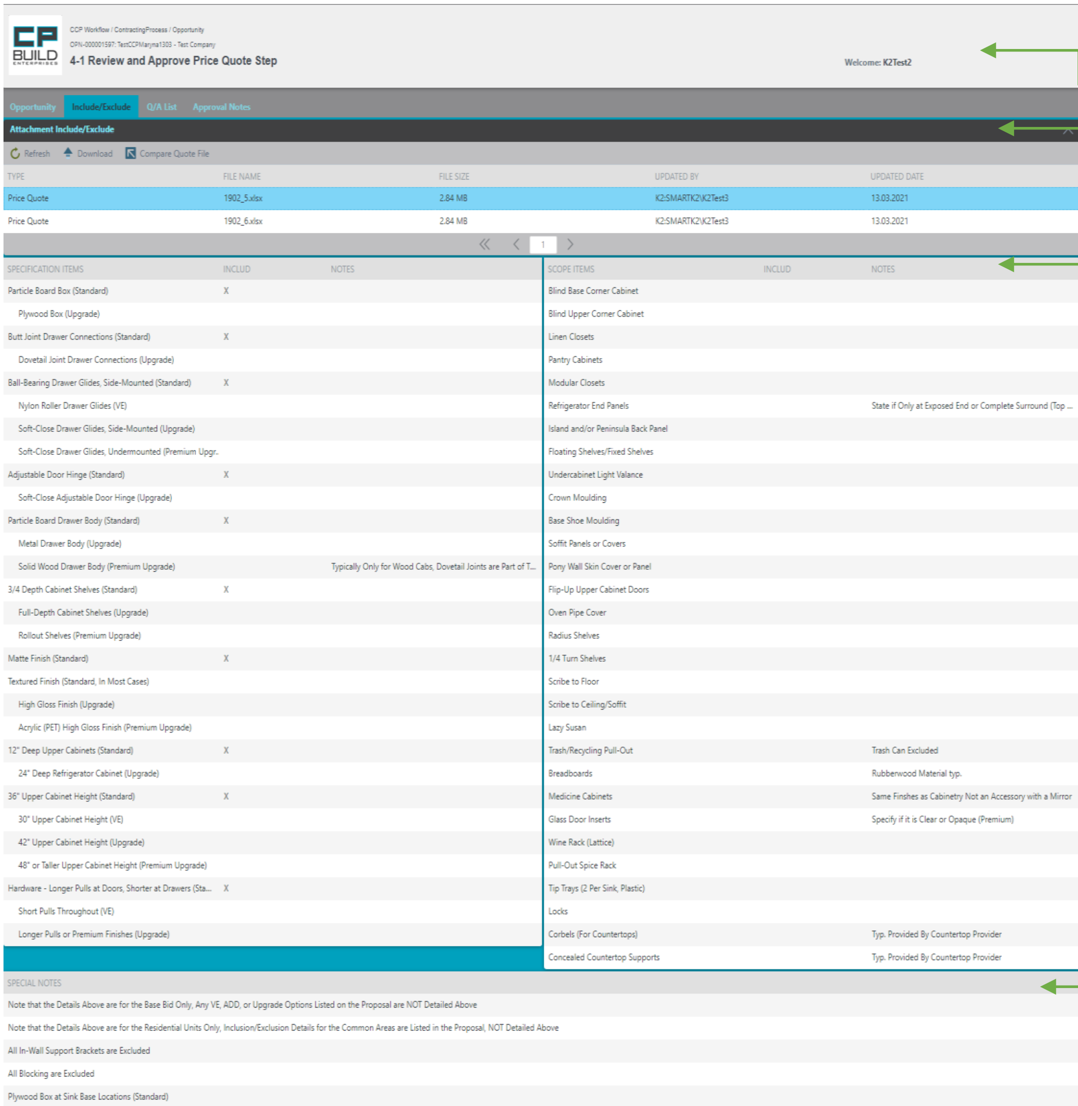


STEP	COMMENT	ACTION	DISPLAY NAME	CREATE DATE	TIME
3-0 Review Bid Setup and Upload Q Proposal		Rework	K2Test3	07.03.2021	12:47:18
2-0 Upload Bid Setup and Customer Bid Documents		Done	K2Test1	07.03.2021	12:37:47
Start	Folio: OPN-000001583: Test CCP - Test Company	Start		27.02.2021	13:31:12

The bottom line in the Action History displays information about when the process started and with which Folio.

Tab Include/Exclude

Tab Include / Exclude becomes available in the Step 3-0 Review Bid Setup and Upload Q Proposal Step. After Uploading the Quotation file to the Opportunity tabs, on the Include\Exclude tab, the user can see the specification items and special notes of the Quotation file.



Header section, which displays current information about process name, project name and step number with its name and username.

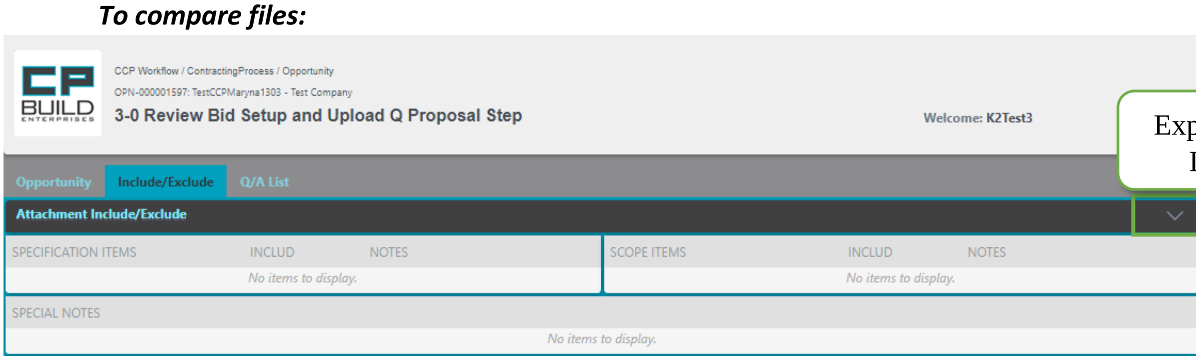
On the Attachment view, you may see Quotation Files. Download them or Compare Quote File.

On the Include \ Exclude tab, you can see the Specification Items and Scope Items of the Quote file.

On the Include \ Exclude tab, you can see the Special Notes of the Quote file.

Screenshot - Sales – Step 4-1 Review and Approve Price Quotation – Contracting Process

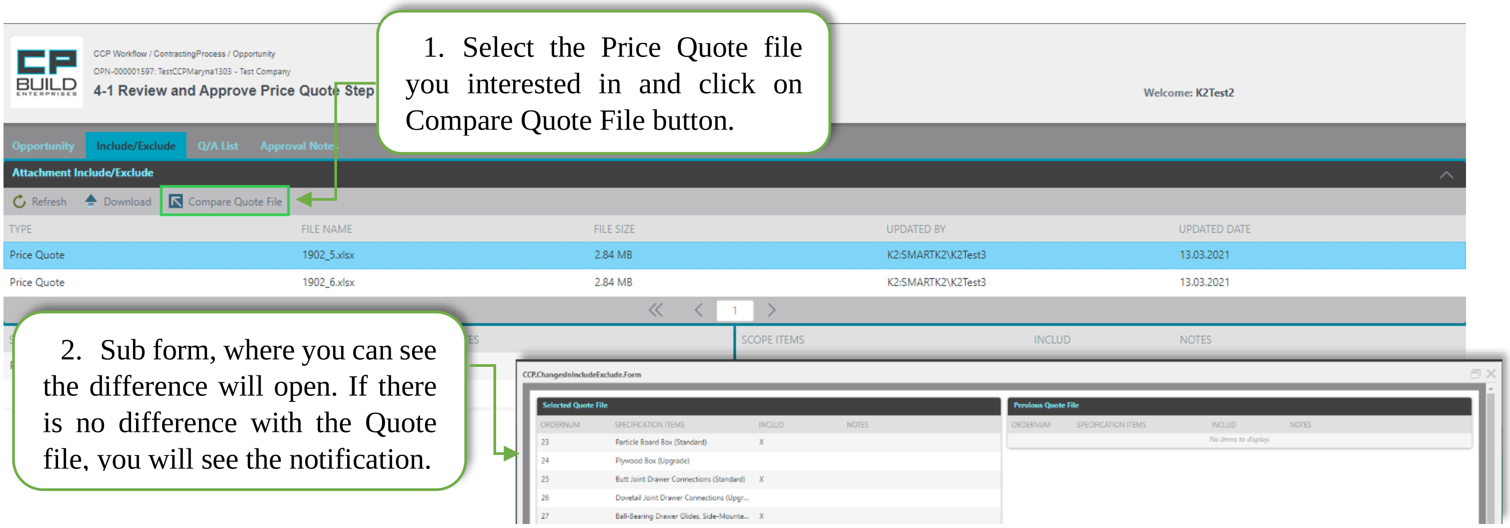
To compare files:



Expand the Attachment Include / Exclude

Screenshot - Sales – Step 3-0 Review Bid Setup and Upload Q Proposal – Contracting Process

After expanding the Attachment Include/Exclude view, the user can use the Compare button to compare the Quotation file to previous information.



**Note: user can compare the Quotation file to the current one.*

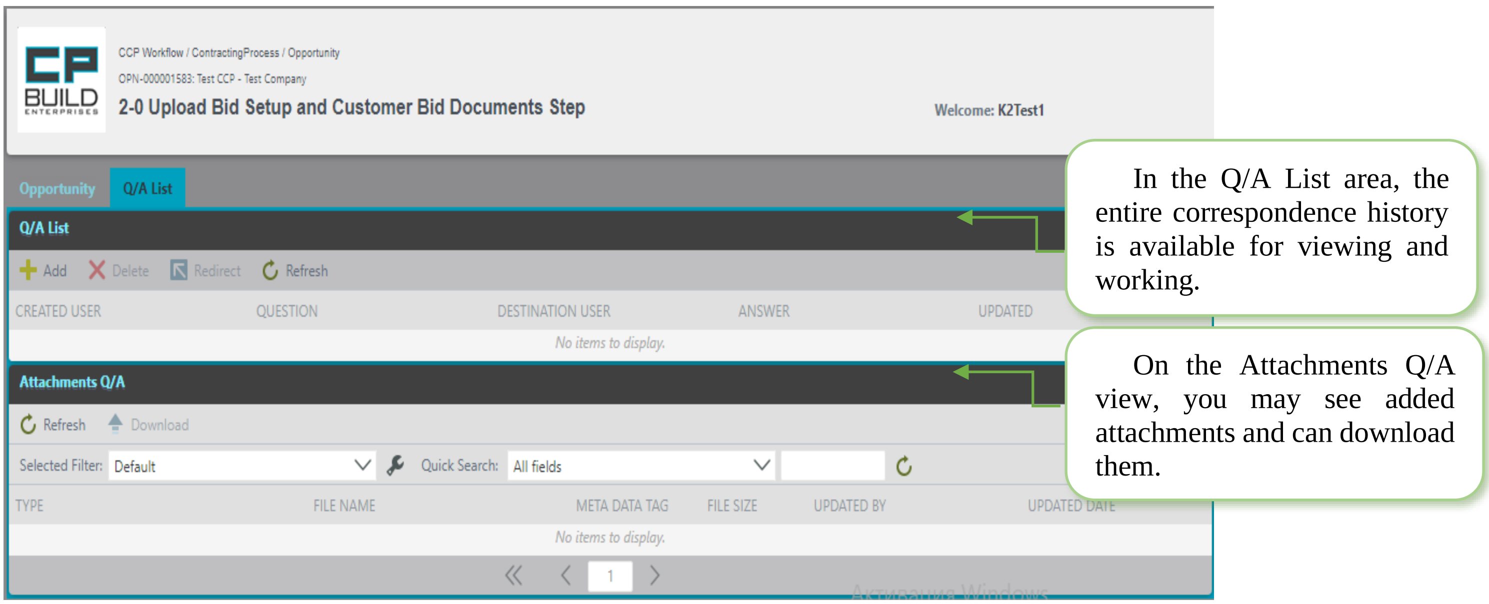
This tab is for informational purposes only and is not editable.

Tab Q/A List

This tab allows the user to correspond on issues related to this project with the Destination user. This tab is available from the first step of the project.

The Area Header section is displayed at each step. This area is informative and is not changed by anyone.

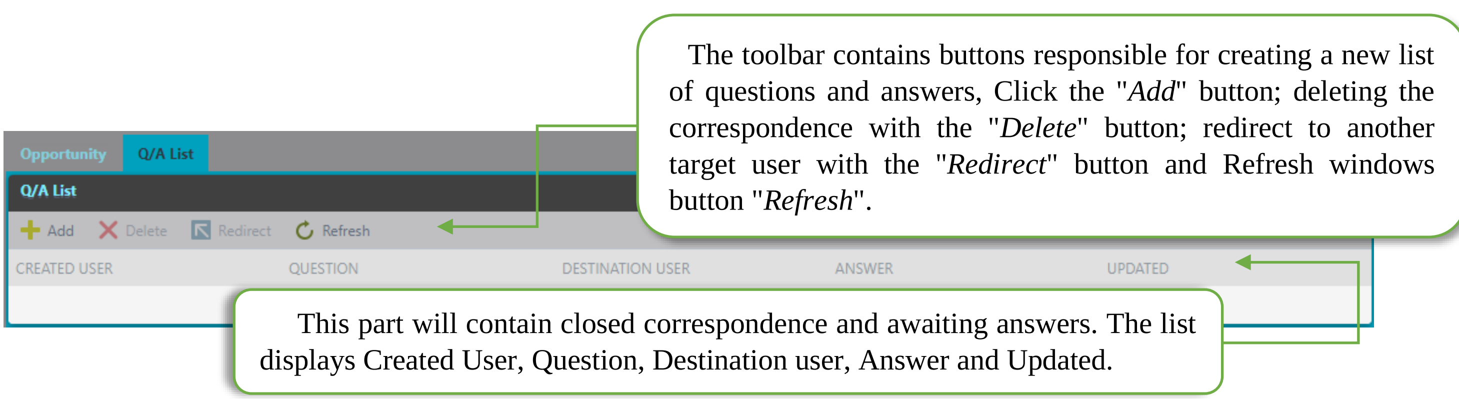
Area Attachments Q/A view user may see added attachments and download them. Attachment Q/A area works similarly to the Attachments area in the Opportunity tab.



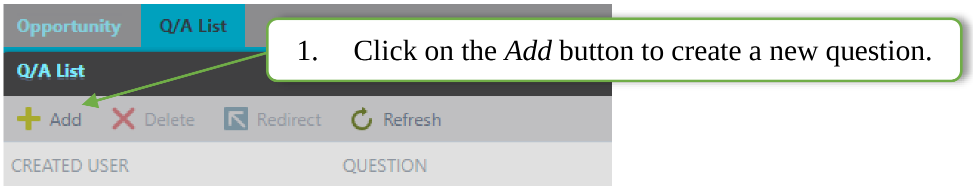
Screenshot - Sales – Step 2-0 Upload Bid Setup and Customer Bid Documents – Contracting Process

Q/A List

In the Q/A List part, a letter is created with a question or answer to the letter that came to the user. The user can see the history of the correspondence here.

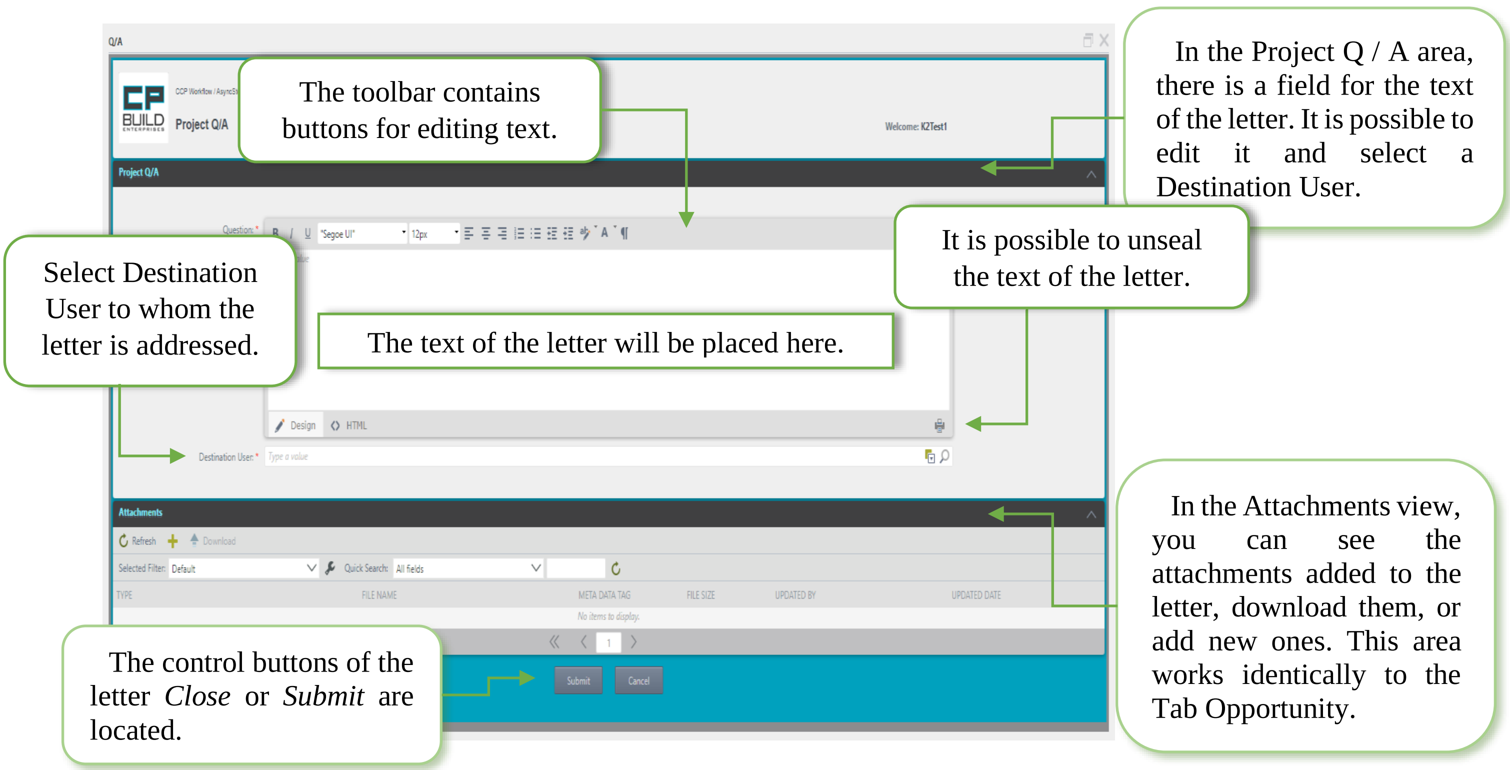


To add new Q/A List:

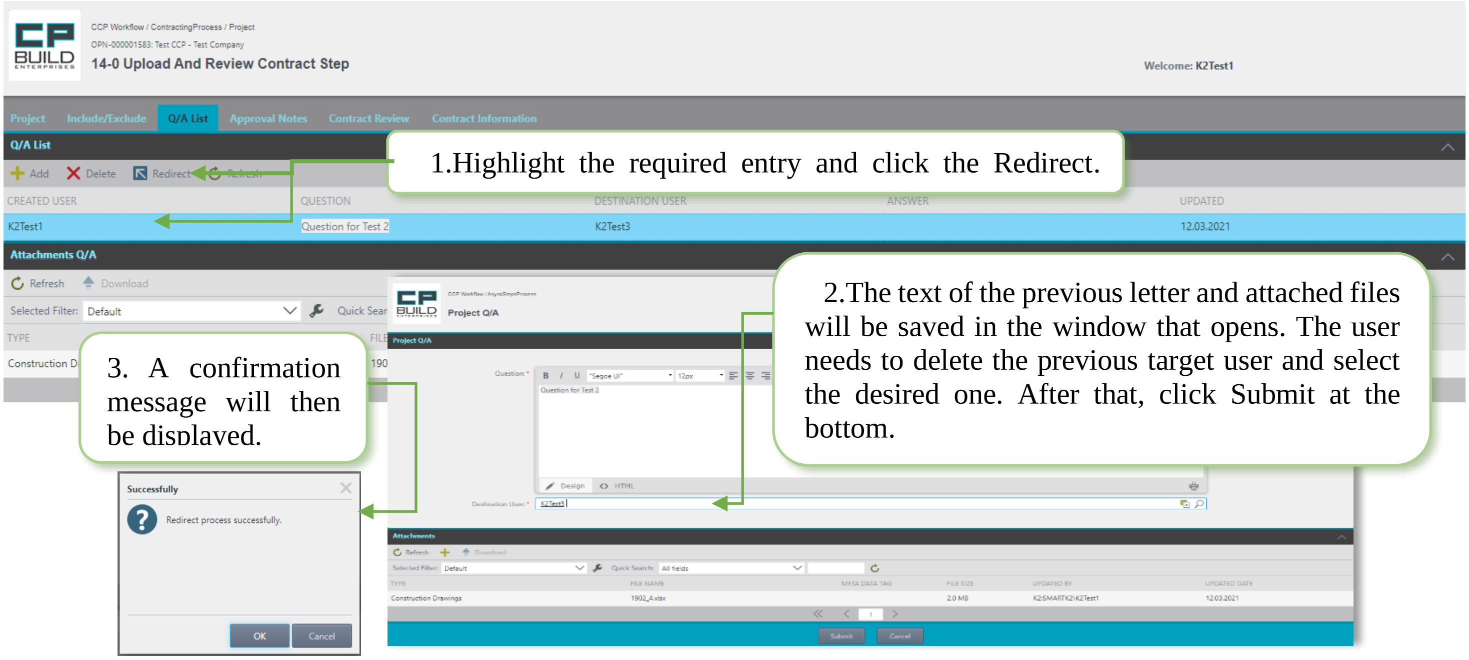


In the opened sub-form Project Q/A enter the Question, select the Destination User and, if needed, add an Attachment. You then click on the "Submit" button to submit the question, or on "Cancel" to exit the sub-form without saving. After you Submit, your question will immediately come to the recipient, the answer user will see iit n email and in the Q/A List at the ANSWER field.

If the user selects the wrong recipient, then select the question row, click on the Redirect button, and select another destination user.

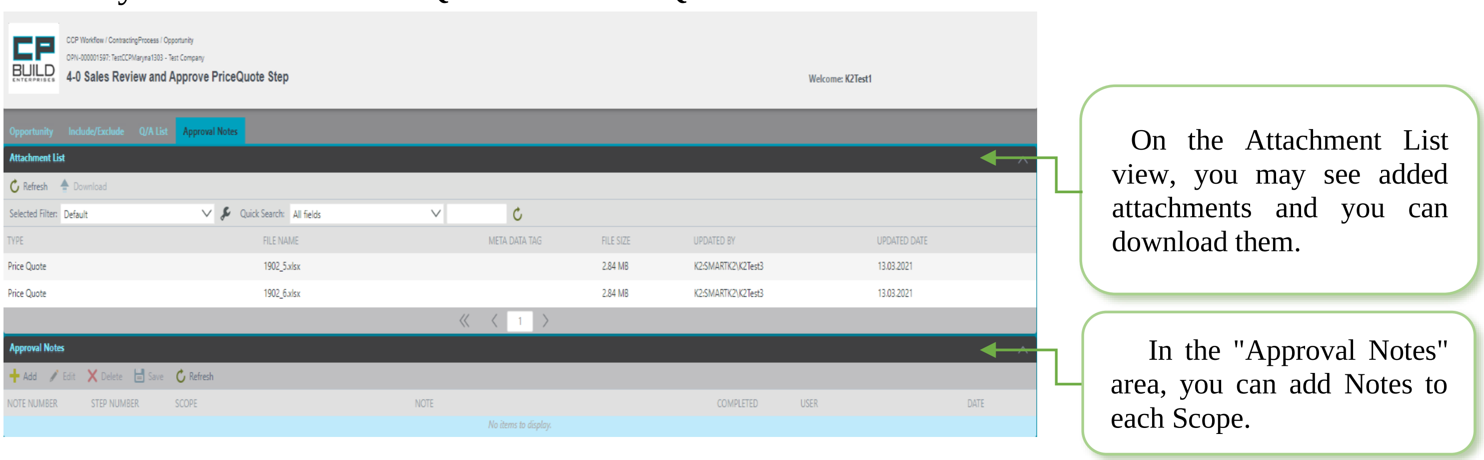


After the user sends the letter and in the next steps, this is what the Q / A List form will look like, if there is a need to redirect the letter to another recipient.

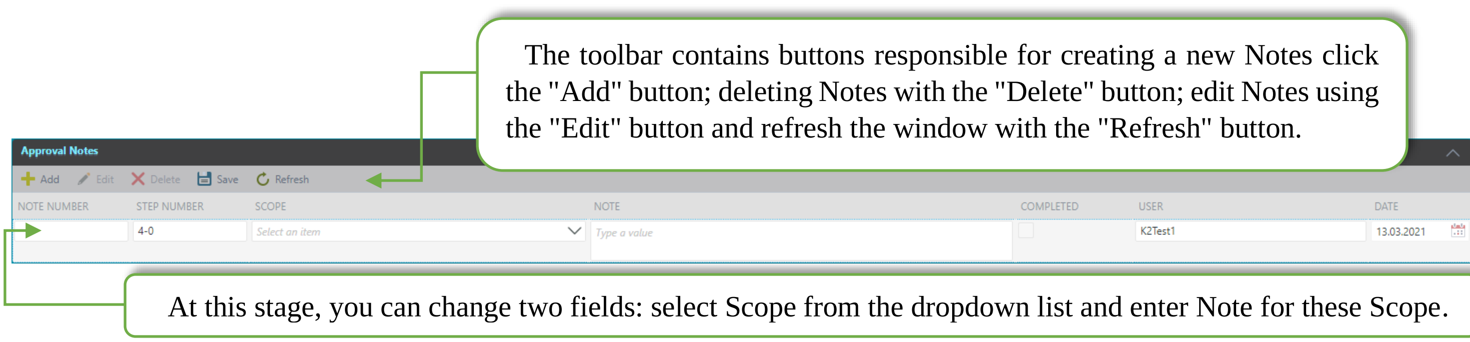


Tab Approval Notes

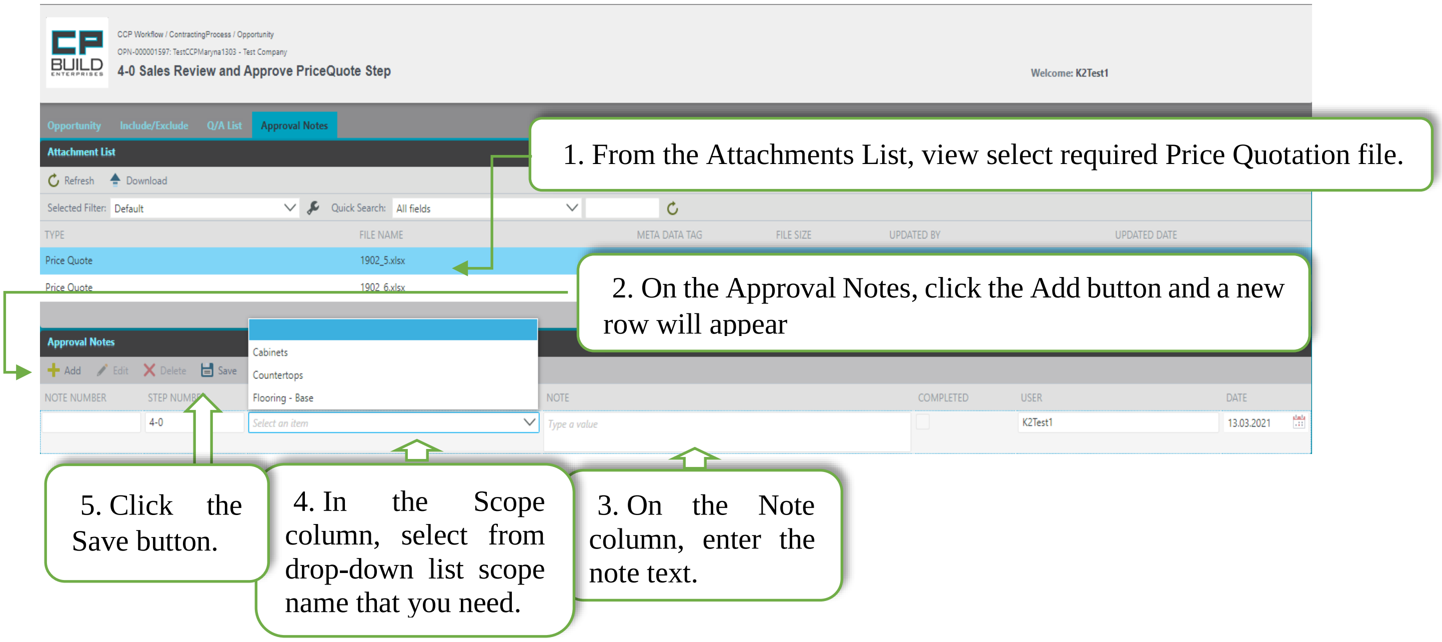
Tab Approval Notes becomes available in Step 4-0 Sales Review and Approve Price Quotation. The Approval Notes tab works with the files with the type of Price Quotation. The Attachment List view user may see added attachments and download them. The Attachment List works similarly to the Attachment Q/A area in the Q/A List tab.



Screenshot - Sales – Step 4-0 Sales Review and Approve Price Quotation – Contracting Process



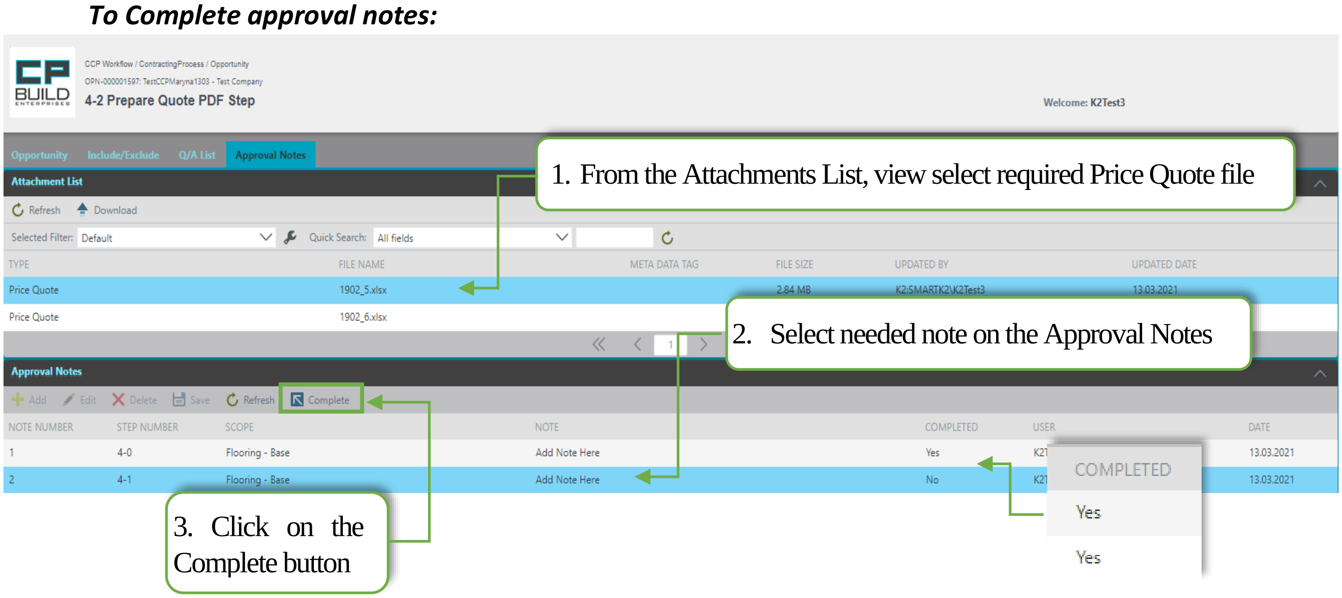
To add notes:



After saving, the status will be displayed with the inscription "Completed" - No.

In Step 4-2 Prepare Quotation PDF Step, On the Approval Notes tab, if approval notes were created in previous steps, the user needs to Complete approval notes.

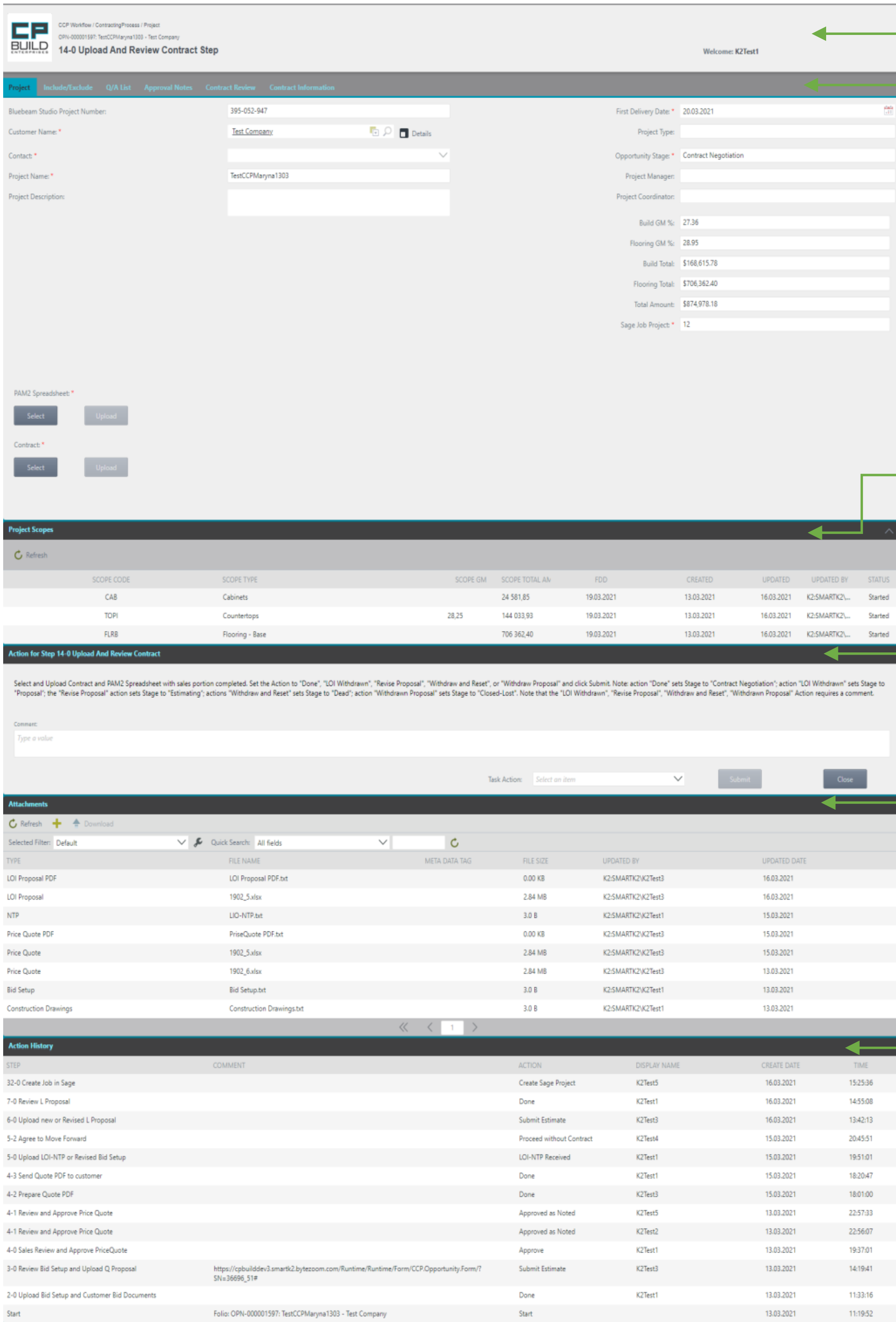
To Complete approval notes:



After pressing on the Complete button, the completed column will change from “No” to “Yes”. After that, this tab works only for viewing.

Tab Project

When moving to the Stage Contract Negotiations at Step 14 "Upload and Review Contract", the "Project" tab, replace the Opportunities tab. The data that is displayed according to the current draft contract works the same as with the Opportunities tab.

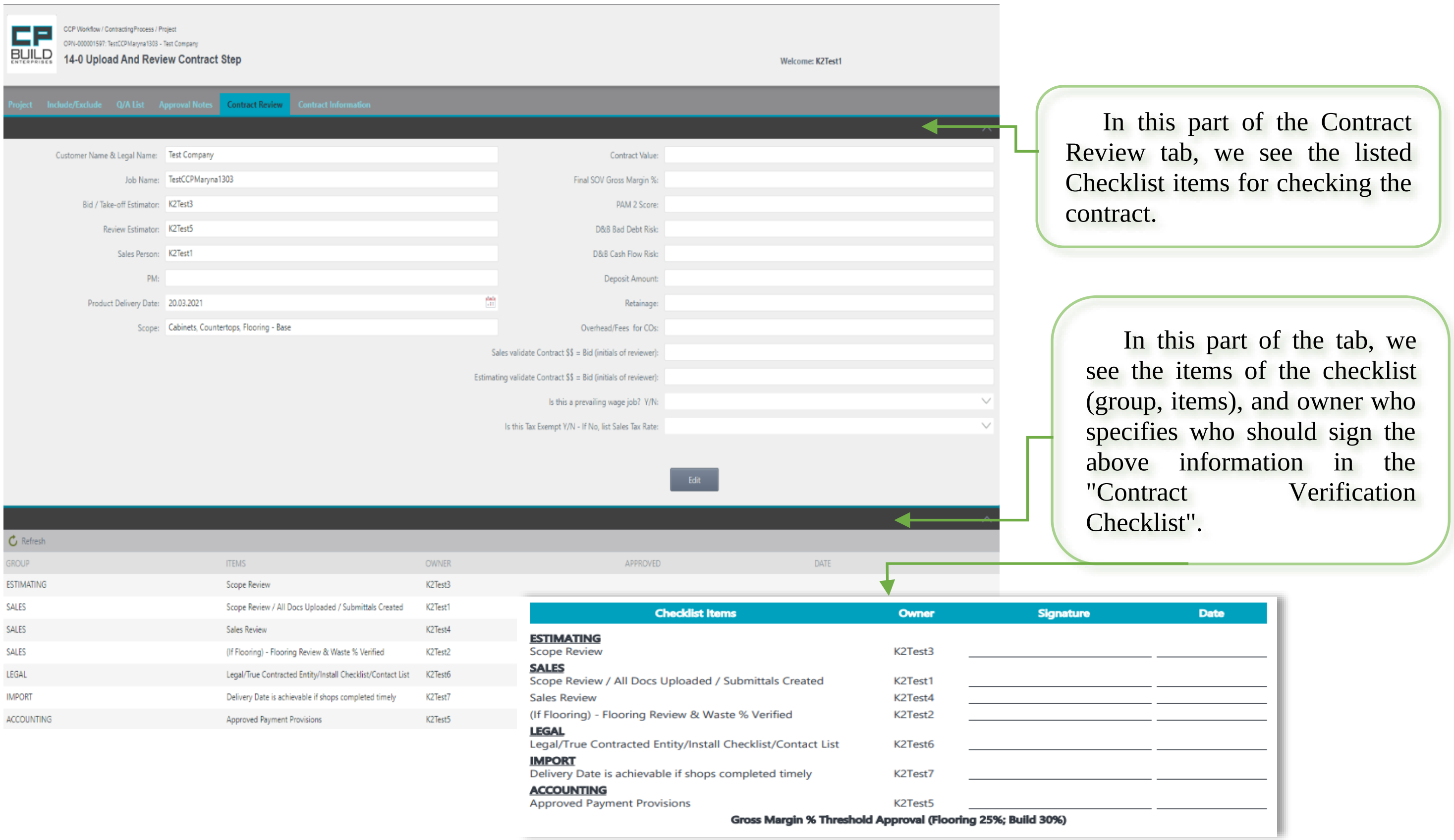


Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process

On the Project tab, you can upload the necessary documents for the corresponding step and * indicate the required fields.

Tab Contract Review

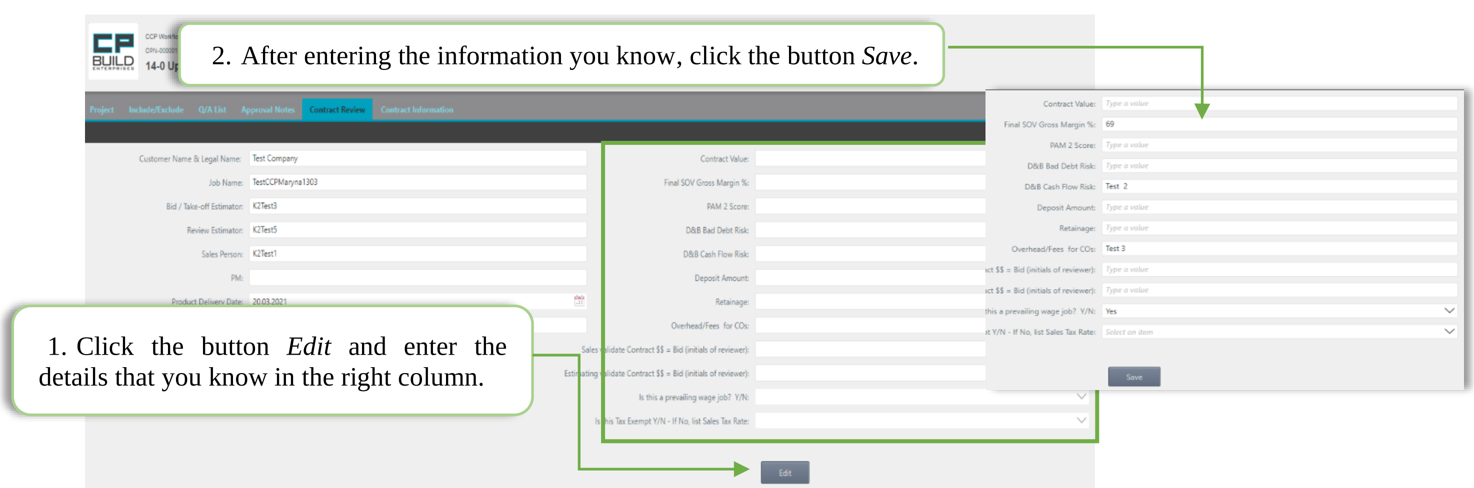
When going to the Contract Negotiation stage at 14 Upload and Review Contract step, the Contract Review tab becomes available.



Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process

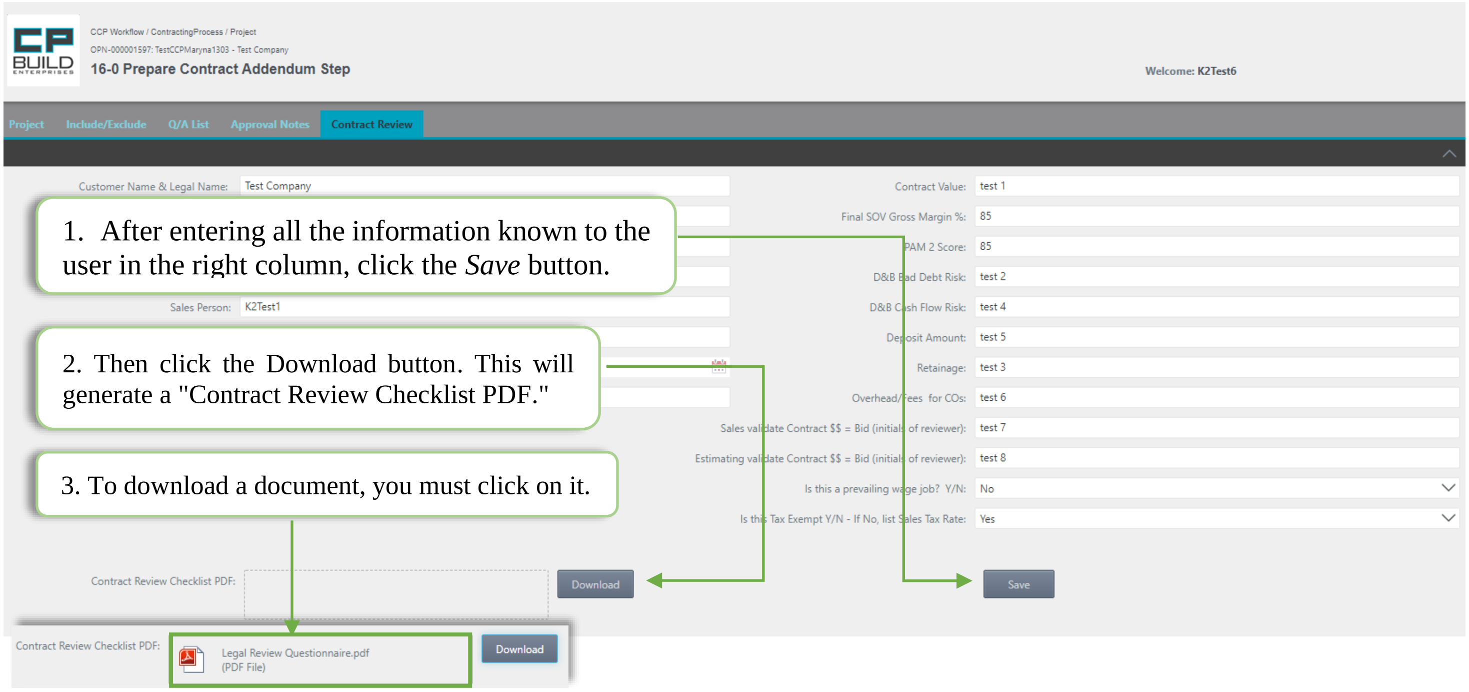
To add information in Contract review checklist:

On the Contract Review, the user can edit fields that would be shown in Contract Verification Checklist. Read the information in the left column and enter the details that you know in the right column. This requires:

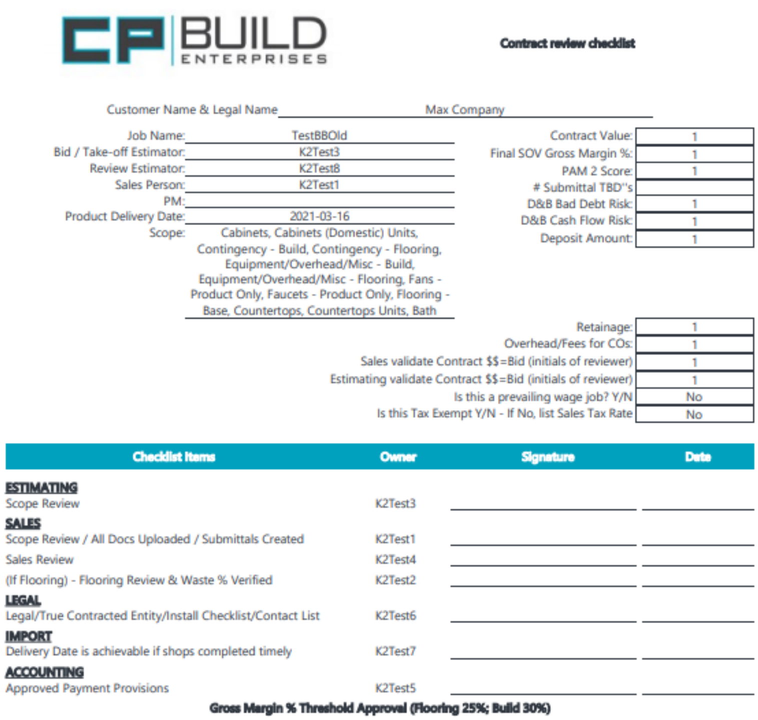


Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process

At Step 16 of Prepare Contract Addendum, the formation of the "Contract review checklist" and loading becomes available.



After loading, the document will look like



Contract review checklist

Customer Name & Legal Name: Max Company

Job Name:	TestBBOld	Contract Value:	1
Bid / Take-off Estimator:	K2Test3	Final SOV Gross Margin %:	1
Review Estimator:	K2Test8	PAM 2 Score:	1
Sales Person:	K2Test1	# Submittal TBD''s	
PM:		D&B Bad Debt Risk:	1
Product Delivery Date:	2021-03-16	D&B Cash Flow Risk:	1
Scope:	Cabinets, Cabinets (Domestic) Units, Contingency - Build, Contingency - Flooring, Equipment/Overhead/Misc - Build, Equipment/Overhead/Misc - Flooring, Fans - Product Only, Faucets - Product Only, Flooring - Base, Countertops, Countertops Units, Bath	Deposit Amount:	1

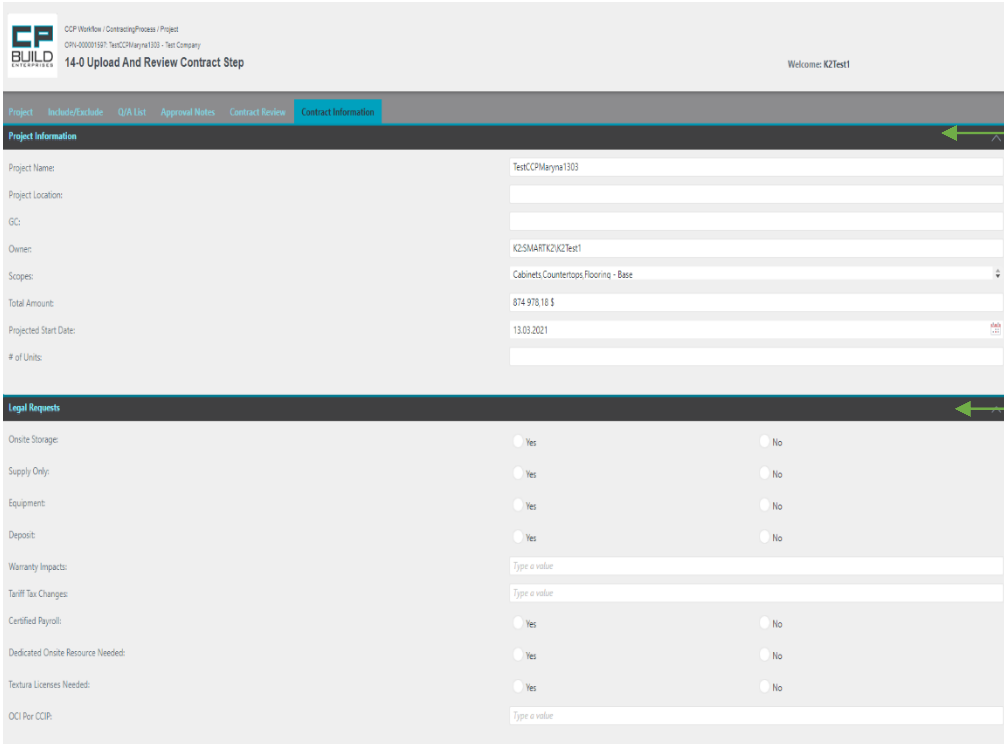
Retainage:	1
Overhead/Fees for COs:	1
Sales validate Contract $$=Bid (initials of reviewer)	1
Estimating validate Contract $$=Bid (initials of reviewer)	1
Is this a prevailing wage job? Y/N	No
Is this Tax Exempt Y/N - If No, list Sales Tax Rate	No

Checklist Items	Owner	Signature	Date
ESTIMATING			
Scope Review	K2Test3		
SALES			
Scope Review / All Docs Uploaded / Submittals Created	K2Test1		
Sales Review	K2Test4		
(If Flooring) - Flooring Review & Waste % Verified	K2Test2		
LEGAL			
Legal/True Contracted Entity/Install Checklist/Contact List	K2Test6		
IMPORT			
Delivery Date is achievable if shops completed timely	K2Test7		
ACCOUNTING			
Approved Payment Provisions	K2Test5		

Gross Margin % Threshold Approval (Flooring 25%; Build 30%)

Tab Contract Information

Going to the Contract Negotiation stage at 14 Upload and Review Contract step, the Contract Information tab becomes available.



In this part, the user can see of the Contract Information.

Review the information in the Project Information area, and then complete the information in the Legal Requests area.

Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process

After clicking the submit button, information from this part will be sent by letter to all participants of this project.

From: K2Service CPBuildDev3 <K2ServiceCPBuildDev3@smartk2.bytezoom.com>
Sent: Tuesday, March 16, 2021 1:20 PM
To: 53038e76.bytezoom.com@amer.teams.ms; K2Test3 <K2Test3@smartk2.bytezoom.com>; K2Test4 <K2Test4@smartk2.bytezoom.com>
Cc: 53038e76.bytezoom.com@amer.teams.ms; K2Test3 <K2Test3@smartk2.bytezoom.com>; K2Test4 <K2Test4@smartk2.bytezoom.com>
Subject: TestBBNew2 Contract Notification

Team,
This email it to inform the team that we have received the attached contract from Max Company

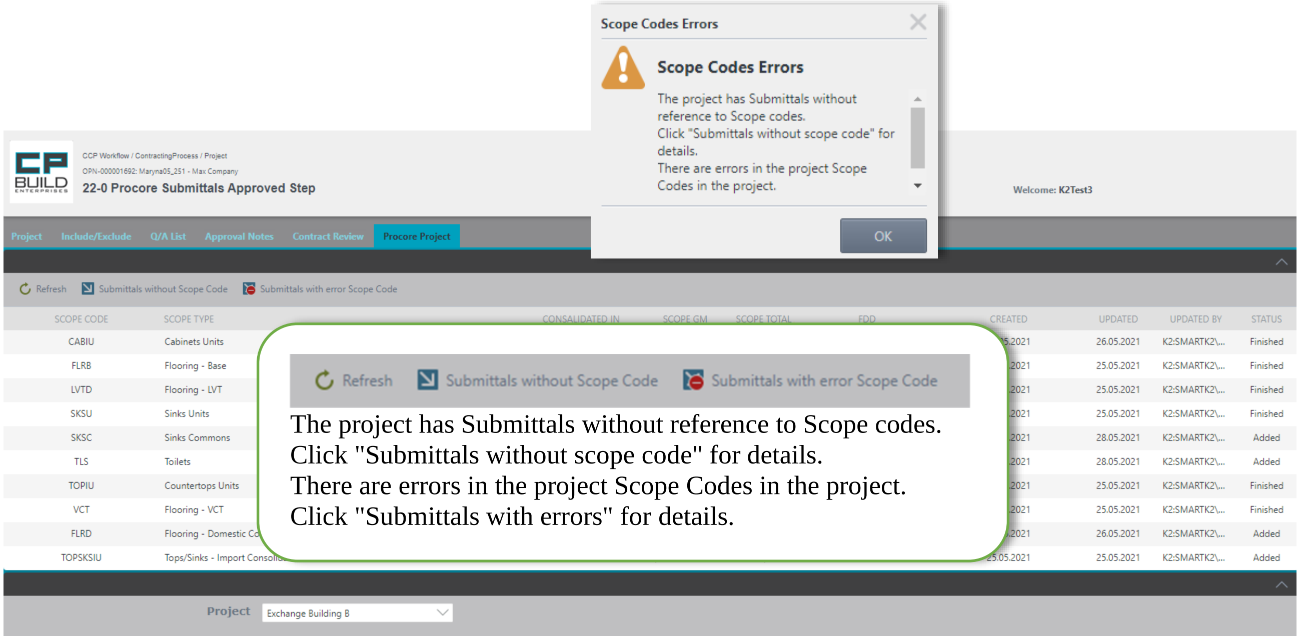
Below is the information needed:

Project Information
Project Name – TestBBNew2
Project Location –
GC –
Owner – K2Test1
Scopes – Cabinets,Cabinets (Domestic) Units,Contingency - Build,Contingency - Flooring,Equipment/Overhead/Misc - Build,Equipment/Overhead/Misc - Flooring,Fans - Product Only,Faucets - Product Only,Flooring - Base,Countertops,Countertops Units
Total Amount – 6525877$
Projected Start Date – 2021-03-16
# of Units -

Legal Requests
Onsite Storage –
Supply Only –
Equipment –
Deposit –
Warranty Impacts –
Tariff and Tax Changes –
Certified Payroll -
Dedicated Onsite Resource Needed -
Textura Licenses Needed -
OCIP or CCIP -

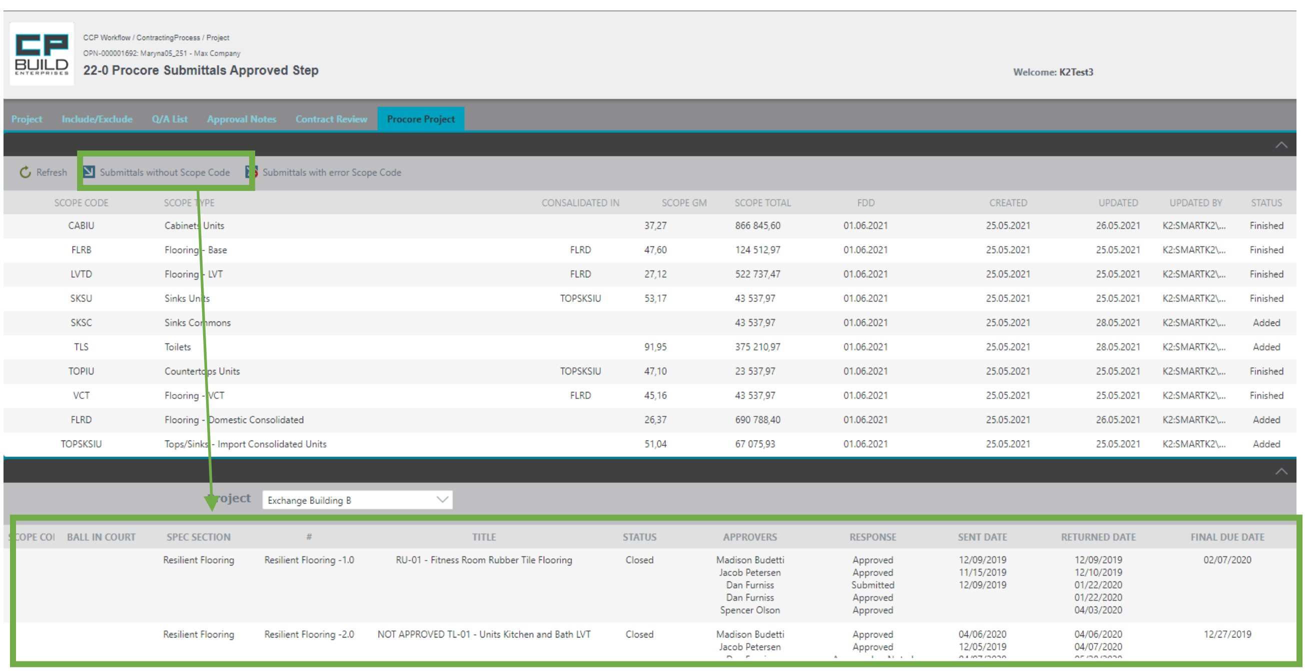
Tab Procore Project

By going to Step 22-0 Procore Submittals Approved, the Tab Procore project is available. When you go to the Procore Project tab, you get acquainted with the message. We then go directly to the information on the tab.



Screenshot – Sales and PM – Step 22-0 Procore Submittals Approved – Contracting Process

After clicking the "Submittals without scope code" button on the toolbar, the user can see.



Screenshot – Sales and PM – Step 22-0 Procore Submittals Approved – Contracting Process

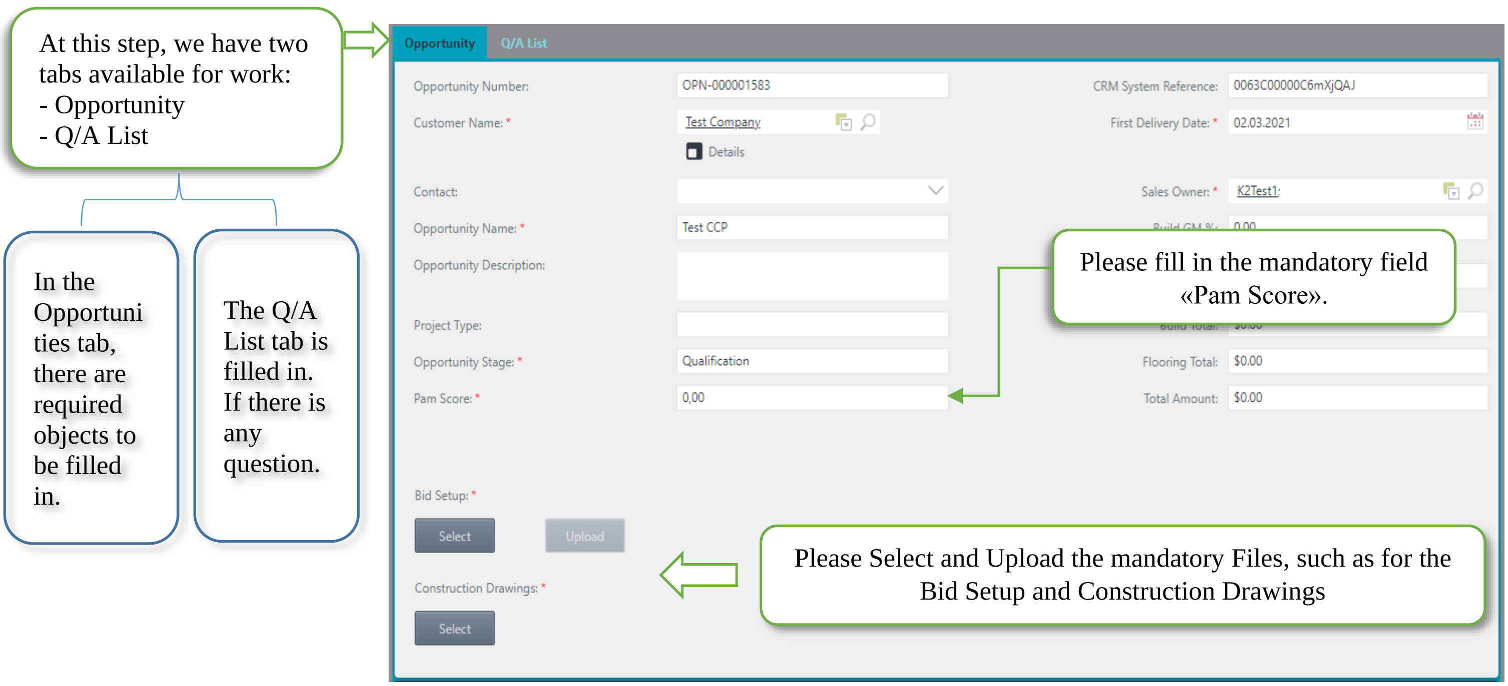
Roles

Task form images and instructions

Sales

2-0 Upload Bid Setup and Customer Bid Documents

In Step 2-0, look at the details on the Opportunity tab. Some fields are already filled in automatically with information from Sales Force. All other fields will be filled in automatically after uploading documents, which will contain this information, or manually by the user. If needed, ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Sales – Step 2-0 Upload Bid Setup and Customer Bid Documents – Contracting Process

Action for Step 2-0 Upload Bid Setup and Customer Bid Documents

At this step, the user needs to:

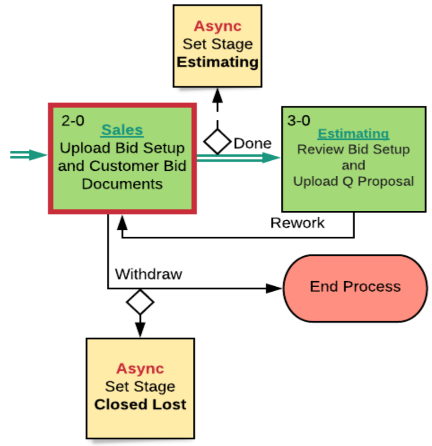
1. Fill in the mandatory field "Pam Score" (if the value needs to be changed).

2. Select and Upload the Bid Setup and Construction Drawings mandatory files, if the user selects the wrong document, click Cancel and try again.

*The User can find a step-by-step description of uploading a file in the description of the Opportunity tab.

3.Then Set Action to "Done" or "Withdraw" and Click Submit.
- The Action **"Done"** changes the Stage to "Estimating". It then moves on to the next step.

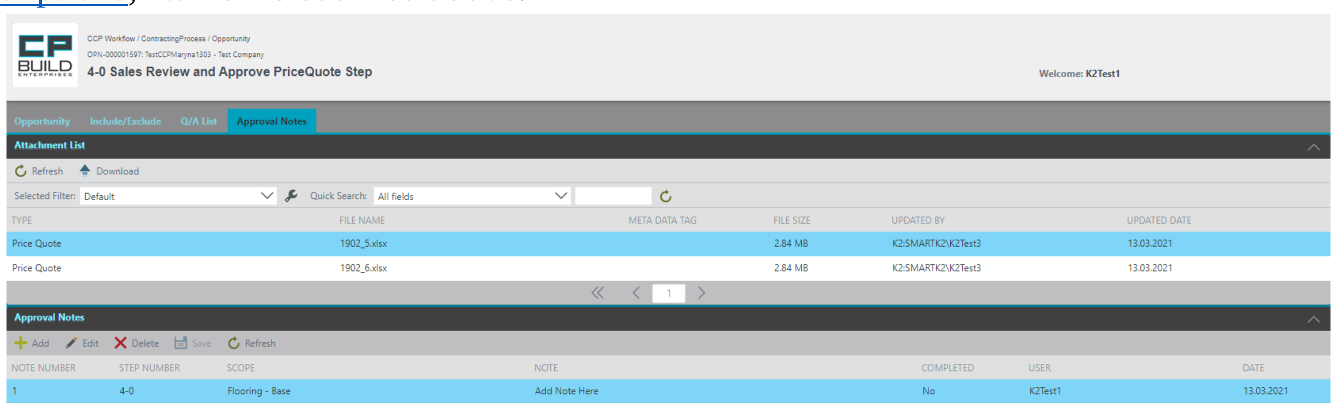
-The Action **"Withdraw"** changes the Stage to "Closed-Lost".
*Note: that the "Withdraw" Action requires a comment.



Screenshot – Lucid Chart – Step 2-0 Upload Bid Setup and Customer Bid Documents – Contracting Process

4-0 Sales Review and Approve Price Quotation

In Step 4-0, the Approval Notes tab becomes available. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Sales – Step 4-0 Sales Review and Approve Price Quotation – Contracting Process

Action for Step 4-0 Sales Review and Approve Price Quotation

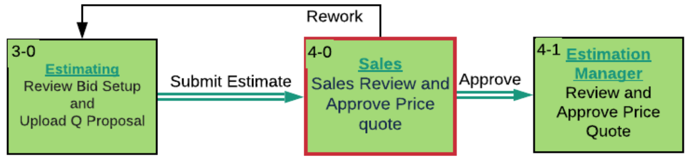
At this step, the user needs to:

1. Complete and Save the Approval Conditions for Scope in the Approval Notes tab. They must then go to the "Opportunity" tab.

* The user can find a step-by-step description of how to work with the Approval Notes tab in "Form images and descriptions."

2. Set Action to "Approve" or " Rework " and Click Submit.
- The Action **"Approve"** moves on to the next step.
- The Action **"Rework"** returns to the "Review Bid Setup and Upload Quotation" step.

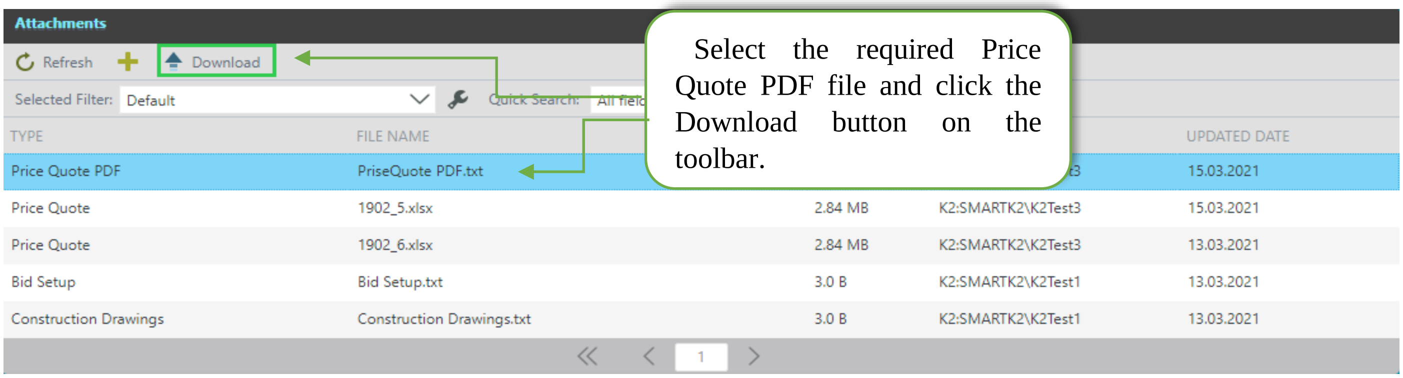
*Note that the “Rework” Action requires a comment.



Screenshot - Lucid Chart – Step 4-0 Sales Review and Approve Price Quotation – Contracting Process

4-3 Send Quotation PDF to customer

Step 4-3 requires Sales to Send a Quotation PDF to the customer. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Sales – Step 4-3 Send Quotation PDF to customer – Contracting Process

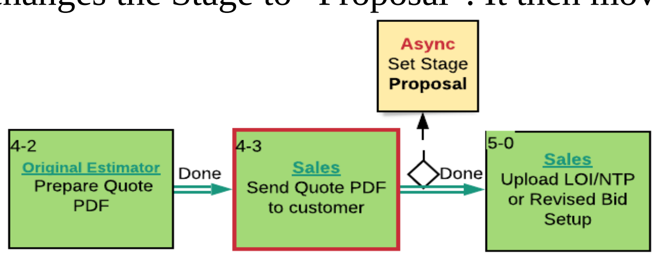
Action for Step 4-3 Send Quotation PDF to customer

At this step, user needs to:

1. On the Opportunity tab, go down to the Attachments list. Download the Price Quotation PDF from the Attachments List and Send to Customer.

2. Then Set the Action "Done" and click Submit.

- The Action **"Done"** changes the Stage to “Proposal”. It then moves on to the next step.

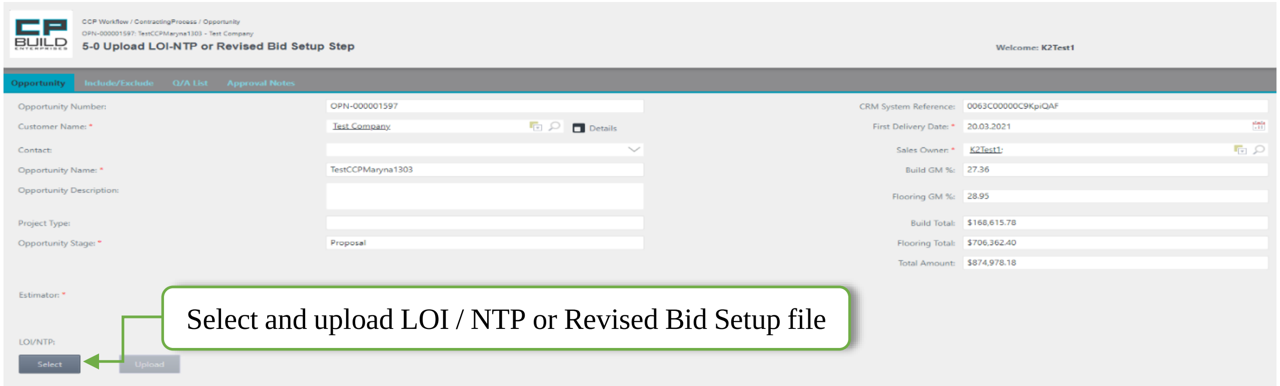


Screenshot - Lucid Chart – Step 4-3 Send Quotation PDF to customer – Contracting Process

5-0 Upload LOI/NTP or Revised Bid Setup

Step 5-0 is the select and upload LOI / NTP or Revised Bid Setup file. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the

Include/Exclude tab. Ask a question on Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Sales – Step 5-0 Upload LOI/NTP or Revised Bid Setup – Contracting Process

Action for Step 5-0 Upload LOI/NTP or Revised Bid Setup

In this step, user needs to:

1. User can Select and Upload the LOI/NTP or Revised Bid Setup document. If they select the wrong document, they click Cancel and try again.

*The User can find a step-by-step description of uploading a file in the description of the Opportunity tab.

2. They then Set Action to "Contract Received", "Dead-New", "Estimating Rework", "LOI-NTP Received" or "Reject," then click Submit.

- The Action **"Contract Received"** sets the Stage to "Contract Negotiation". It then moves on to the next step.

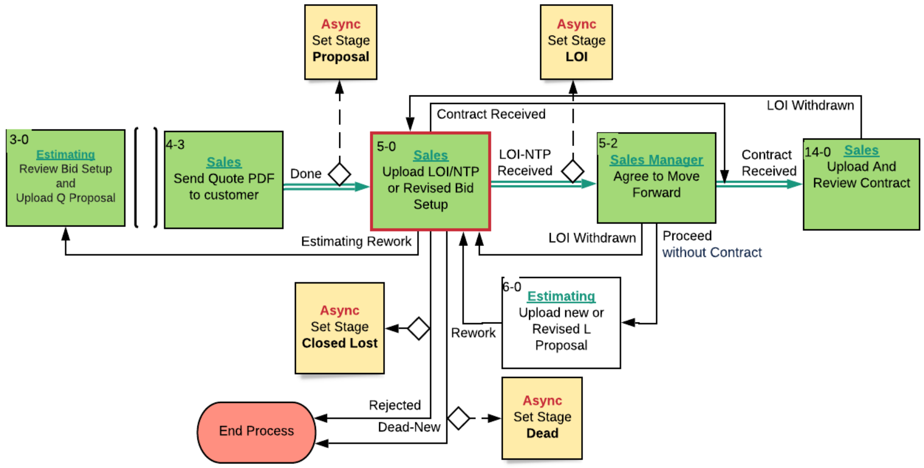
- The Action **"Dead-New"** sets the Stage to "Dead" and creates a New instance of the task.

- The Action **"Estimating Rework"** returns to the “Review Bid Setup and Upload Q Proporsal” step.

- The Action **"LOI-NTP Received"** sets the Stage to "LOI". It then moves on to the next step.

- The Action **"Reject"** sets the Stage to "Closed-Lost".

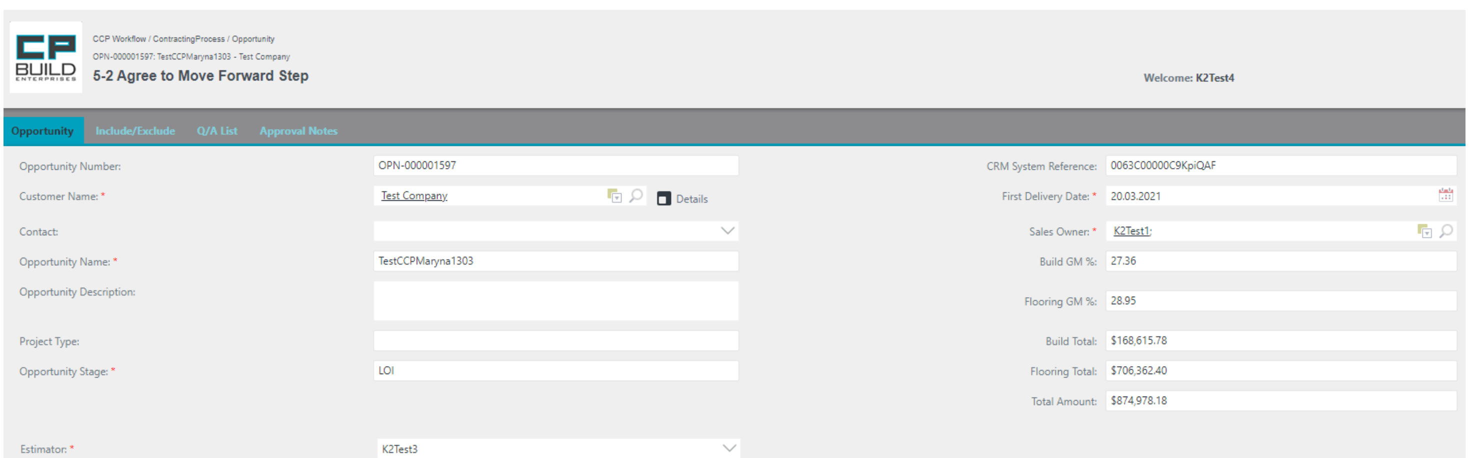
*Note that the "Dead-New", "Estimating Rework" and "Reject" Actions require a comment.



Screenshot - [Lucid Chart](#) – Step 5-0 Upload LOI/NTP or Revised Bid Setup – Contracting Process

5-2 Agree to Move Forward Step

The process is awaiting the receipt of the contract. When the contract is received, agree to move to a forward step. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



Screenshot - Sales – Step 5-2 Agree to Move Forward Step – Contracting Process

Action for Step 5-2 Agree to Move Forward Step

In this step, the user must:

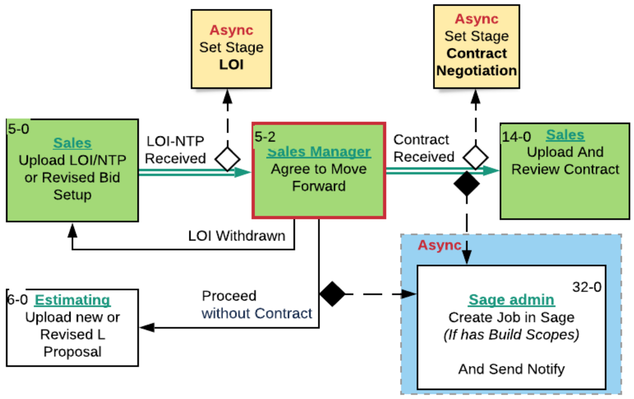
1. Set Action to "Proceed without Contract", "Contract Received" or " LOI Withdrawn, " then click Submit.

- The Action **"Contract Received"** sets the Stage to "Contract Negotiation" and bypasses the creation of L Proposal and to go directly to Step "Upload and Review Contract";

- The Action **"Proceed without Contract"** moves on to the "Upload new or Revised L Proposal" step;

- The Action **"LOI Withdrawn"** returns to the “Upload LOI/NTP or Revised Bid Setup” step.

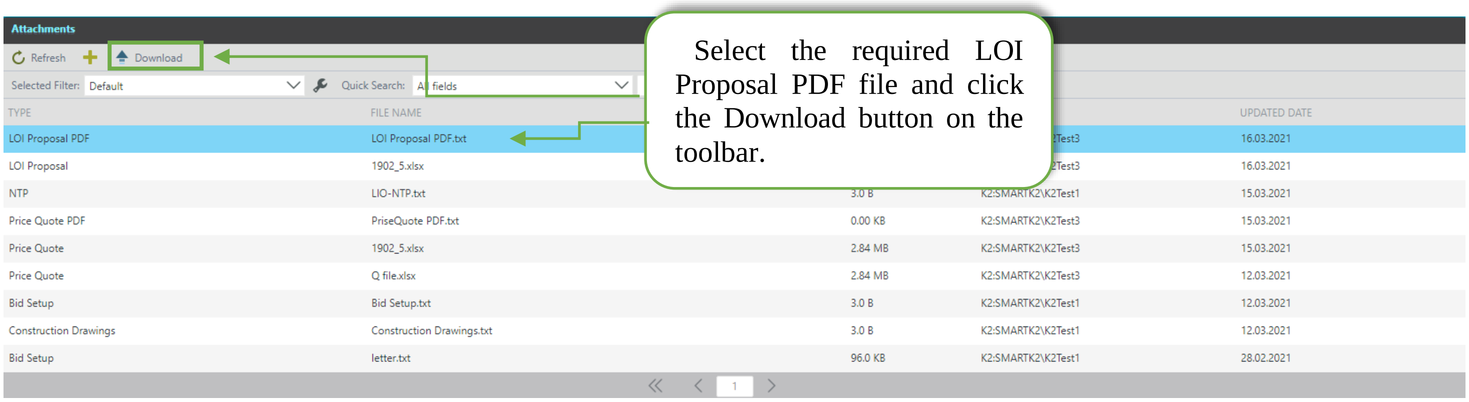
*Note that the "LOI Withdrawn" Action requires a comment.



Screenshot - [Lucid Chart](#) – Step 5-2 Agree to Move Forward Step – Contracting Process

7-0 Review L Proposal

Step 7-0 - Download and review the LOI Proposal file from the Attachments section. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



Screenshot - Sales – Step 7-0 Review L Proposal– Contracting Process

Action for Step 7-0 Review L Proposal

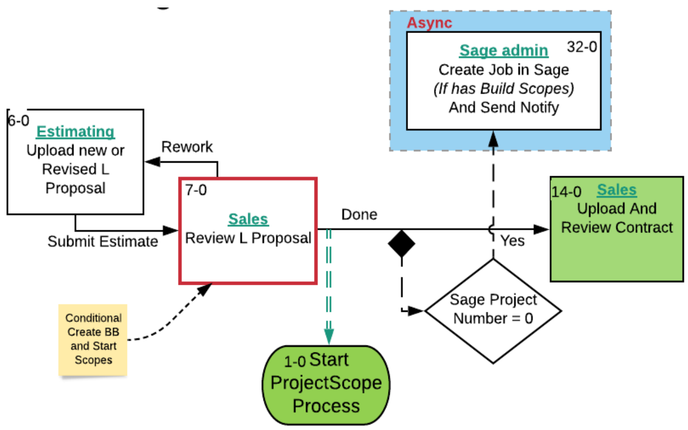
In this step, user need:

1. On the Opportunity tab, go down to the Attachments List. Download and review the LOI Proposal file from the Attachments List.

2. Set Action to “Done” or “Rework” and click Submit.

- The Action **"Done"** moves on to the next step.
- The Action **"Rework"** returns to the “Upload new or Revised L Proposal” step.
*Note that the “Rework” Action requires a comment.

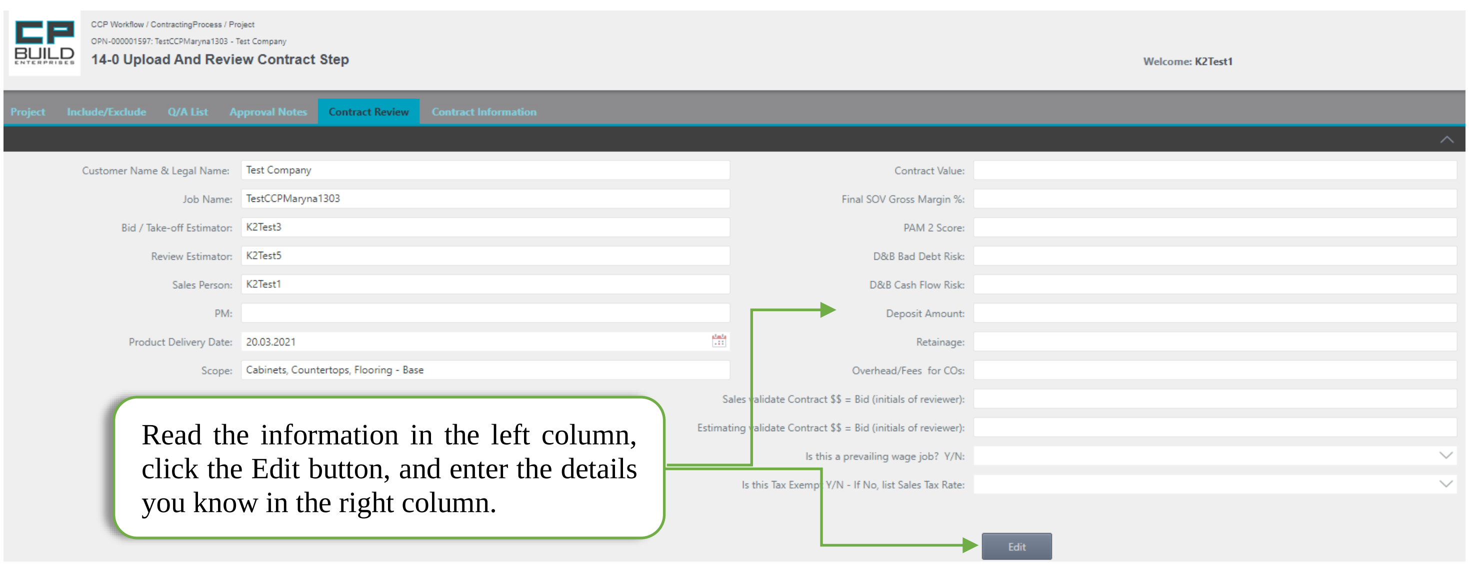
After the Click button is done with the Step 7-0 Review L Proposal Step, the Project Scope Process is launched in parallel.



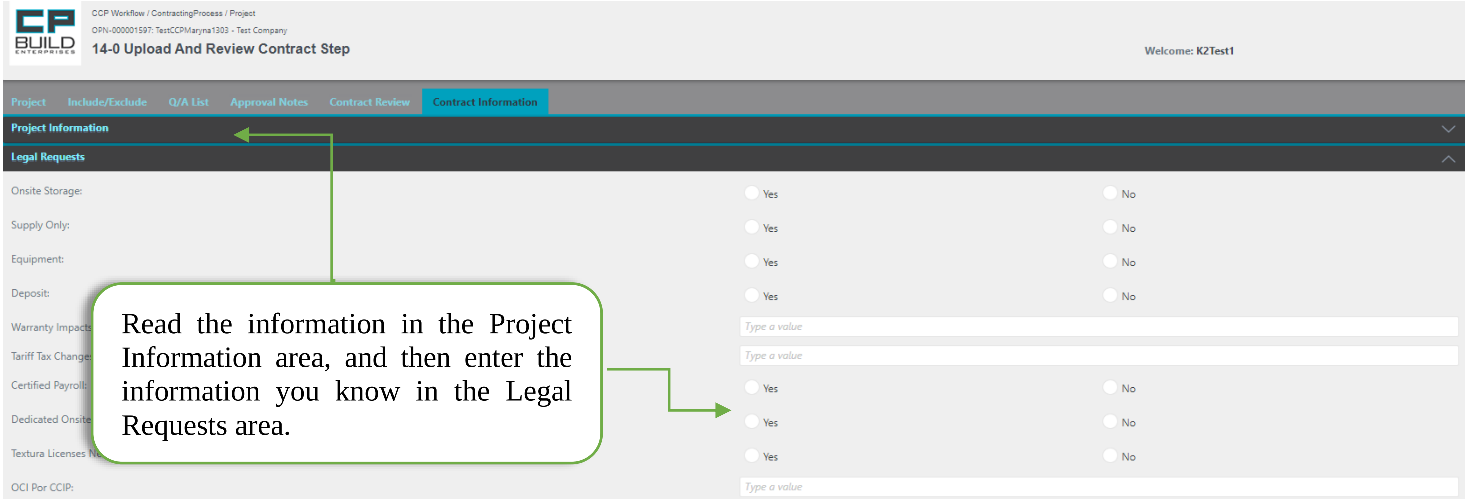
Screenshot - Lucid Chart – Step 7-0 Review L Proposal– Contracting Process

14-0 Upload and Review Contract

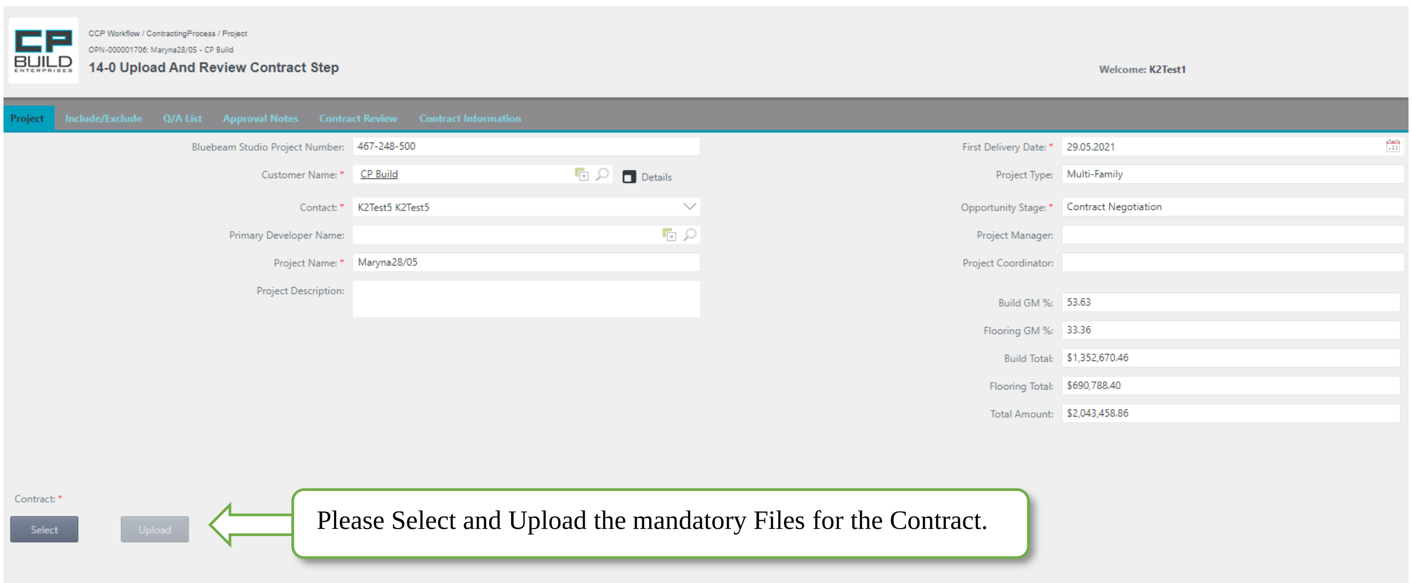
In Step 14-0, it is necessary to enter information that the user knows in the tabs "Contract Review", "Contract Information" and "Project". If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process



Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process



Screenshot - Sales – Step 14-0 Upload and Review Contract – Contracting Process

Action for Step 14-0 Upload and Review Contract

In this step, user must:

1. On the “Contract Review” Tab, click the Edit button and fill in the fields with the data that is available. The user can learn how to work with the corresponding tabs in the section "Form Images and Descriptions," which is outlined above.

2. Go to the “Contract Information” Tab in the Legal Request area and fill in the fields. After clicking the Submit button, information from the “Contract Information” Tab will be sent by letter to all project participants. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

3. Go to the “Project” tab, Select and Upload Contract with the sales portion completed. If user selects the wrong document, click Cancel and try again.

4. Set the Action to "Done", "LOI Withdrawn", "Revise Proposal", "Withdraw and Reset", or "Withdraw Proposal" and click Submit.

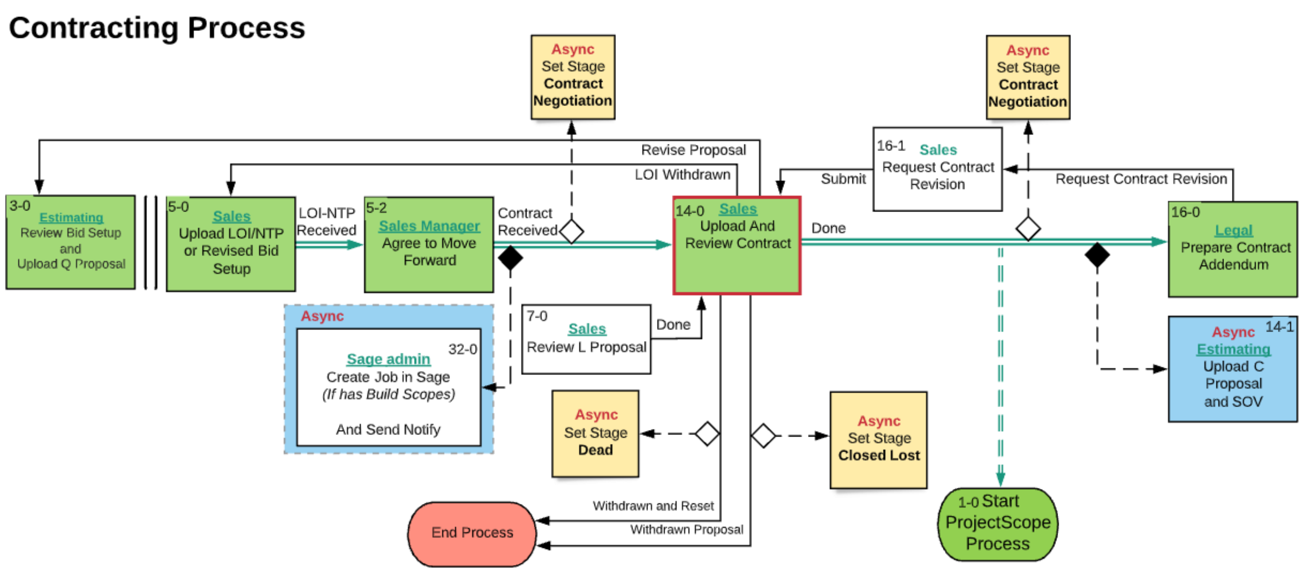
- The Action **"Done"** sets the Stage to "Contract Negotiation". It moves on to the next step.
- The Action **"LOI Withdrawn"** returns to the “Upload LOI/NTP or Revised Bid Setup” step.

- The Action **"Revise Proposal"** returns to the “Review Bid Setup and Upload Q Proposal” step.

- The Action **"Withdraw and Reset"** sets Stage to "Dead".

- The Action **"Withdrawn Proposal"** sets Stage to "Closed-Lost".

*Note that the "LOI Withdrawn", "Revise Proposal", "Withdraw and Reset", "Withdrawn Proposal" Action require a comment.

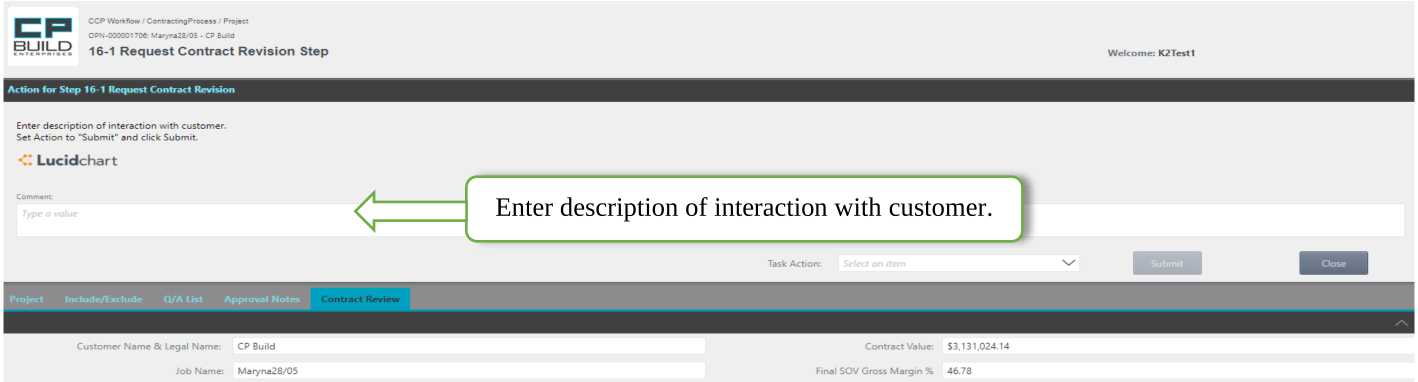


Screenshot - Lucid Chart – Step 14-0 Upload and Review Contract – Contracting Process

If the project went along the path Stage to "Contract Negotiation" and bypasses the creation of L Proposal, it goes directly to Step "Upload and Review Contract". After the Click button Done on Step 14-0 Upload and Review Contract, the Project Scope Process is launched in parallel.

16-1 Request Contract Revision

Step 16-1 Request Contract Revision. Enter a description of the customer interaction. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



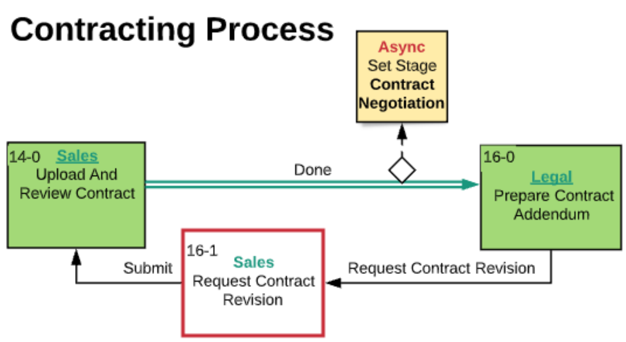
Screenshot - Sales – Step 16-1 Request Contract Revision – Contracting Process

Action for Step 16-1 Request Contract Revision

In this step, the user needs to:

1. Enter a description of the interaction with the customer.
2. Set Action to "Submit" and click Submit.

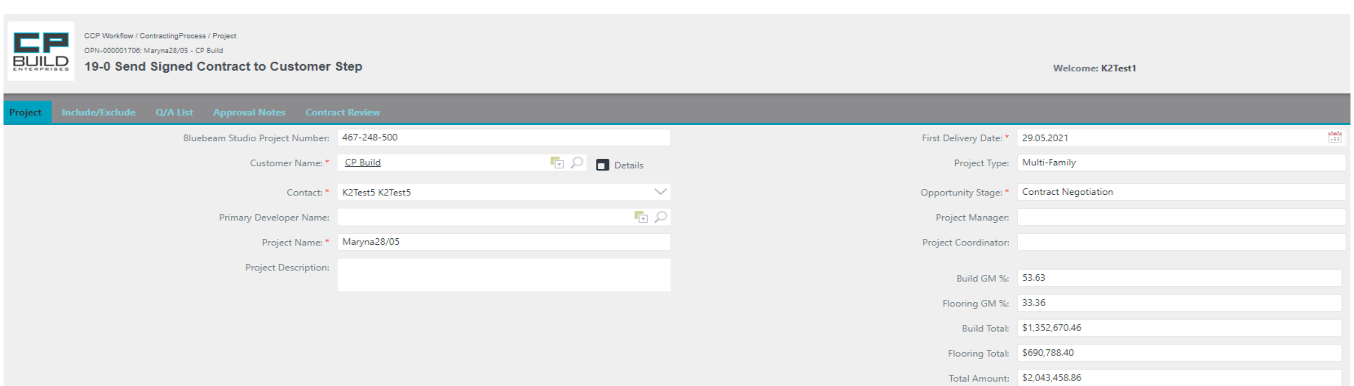
- The Action **"Submit"** moves on to the step 14-0 Upload and Review Contract.



Screen shot - Lucid Chart – Step 16-1 Request Contract Revision – Contracting Process

19-0 Send Signed Contract to Customer Step

Step 19-0 Send Signed Contract to Customer. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screen shot - Sales – Step 19-0 Send Signed Contract to Customer – Contracting Process

Action for Step 19-0 Send Signed Contract to Customer

In this step, the user needs to:

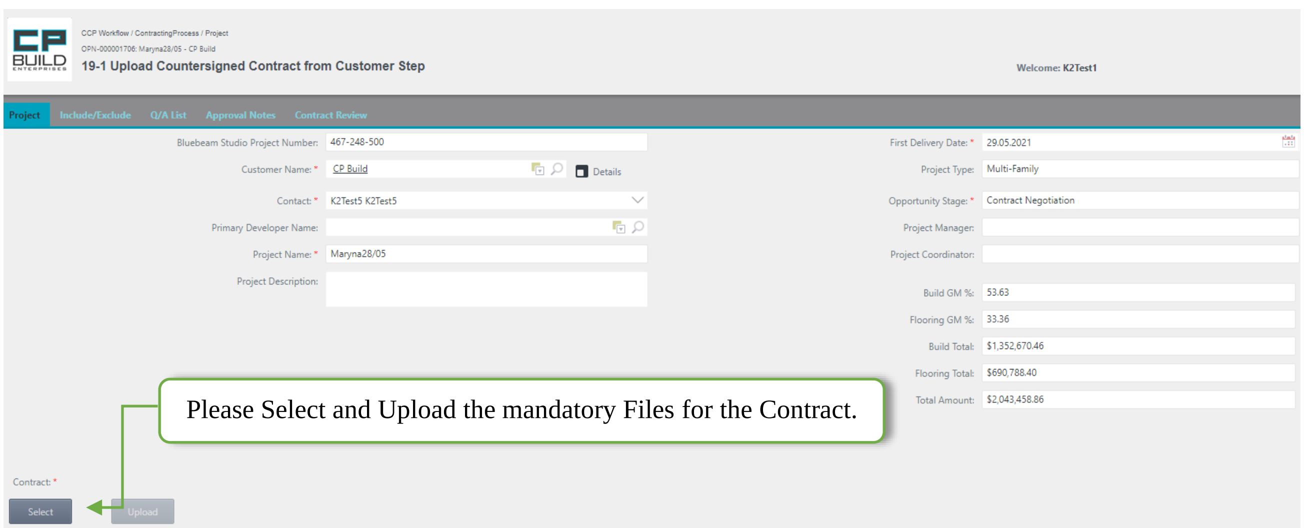
1. Send the Signed Contract to Customer.
2. Set Action to **"Done"** and click Submit.

- The Action **"Done"** moves on to the next step.

Screenshot - [Lucid Chart](#) – Step 19-0 Send Signed Contract to Customer – Contracting Process

19-1 Upload Countersigned Contract from Customer Step

Step 19-1 Upload Countersigned Contract from Customer. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



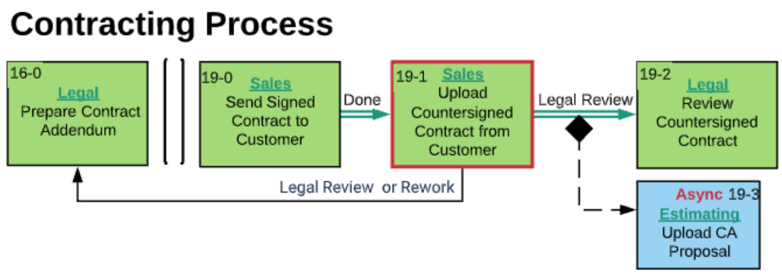
Screenshot - Sales – Step 19-1 Upload Countersigned Contract from Customer – Contracting Process

Action for Step 19-1 Upload Countersigned Contract from Customer

In this step, the user needs to:

1. [Select and upload the Countersigned Contract from the Customer](#). If the user Selects the wrong document, click Cancel and try again.
2. Set Action to **"Legal Review"** or **"Legal Review or Rework"** and click Submit.

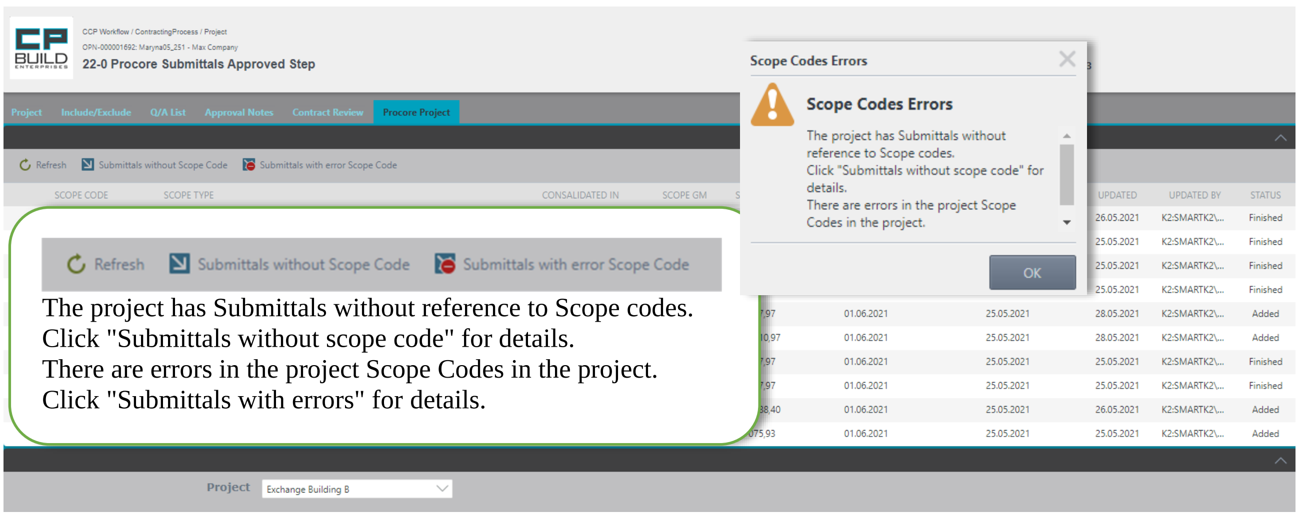
- The Action **"Legal Review"** moves on to the next step.
- The Action **"Legal Review or Rework"** returns to the "Prepare Contract Addendum" step.



Screenshot - [Lucid Chart](#) – Step 19-1 Upload Countersigned Contract from Customer – Contracting Process

22-0 Procore Submittals Approved Step

Step 22-0 Procore Submittals Approved the Procore Project tab is available. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



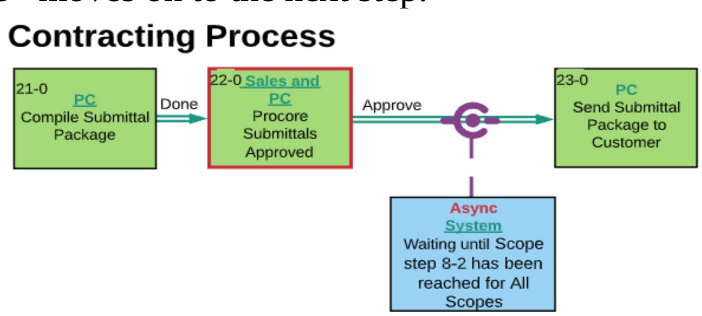
Screenshot - Sales – Step 22-0 Procore Submittals Approved – Contracting Process

Action for Step 22-0 Procore Submittals Approved

In this step, the user needs to:

1. On the [Procore Project tab](#), investigate Scope Code Errors, if any. Click "Submittals without scope code" for details. If the project has Submittals without reference to Scope codes, click "Submittals with errors" for details.
2. On the Project tab, set Action to “Approve” and click Submit.

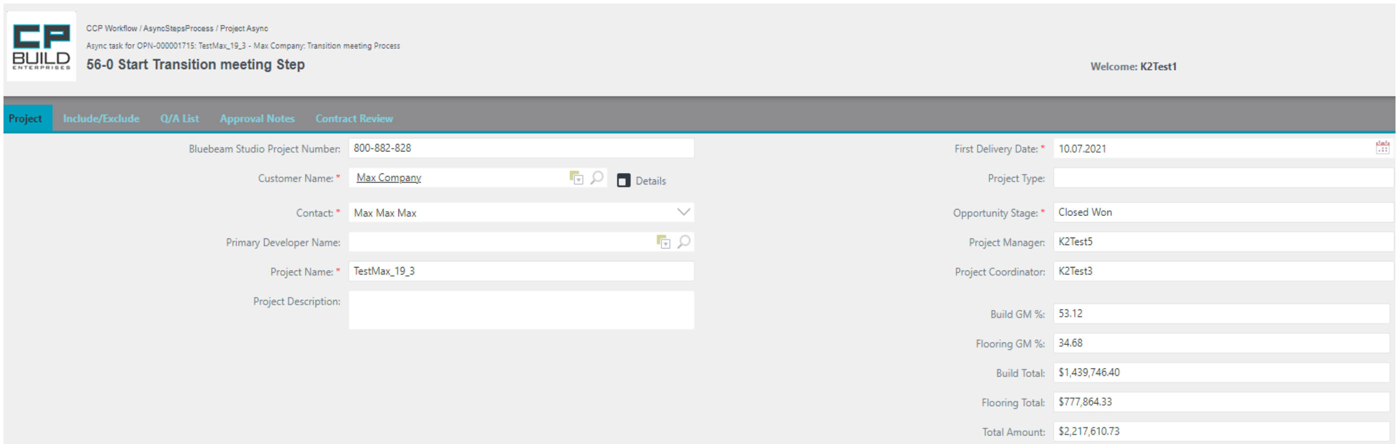
- The Action **"Approve"** moves on to the next step.



Screenshot - [Lucid Chart](#) – Step 22-0 Procore Submittals Approved – Contracting Process

56-0 Start Transition meeting Step

Step 56-0 - Start Transition meeting. Look for details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

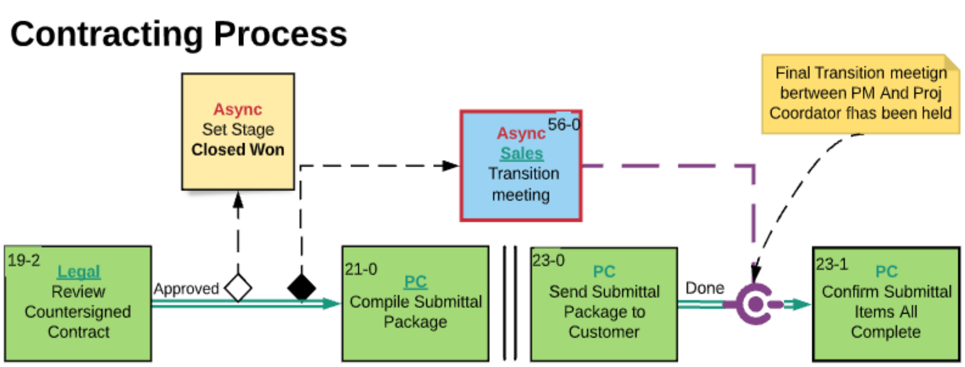


Screenshot - Sales – Step 56-0 Start Transition meeting – Contracting Process

Action for Step 56-0 Start Transition meeting

In this step, the user needs to:

1. After this step, Sales holds a transition meeting with PM and PC.
2. Set Action to **"Done"** and click Submit.
   - The Action **"Done"** moves on to the next step.

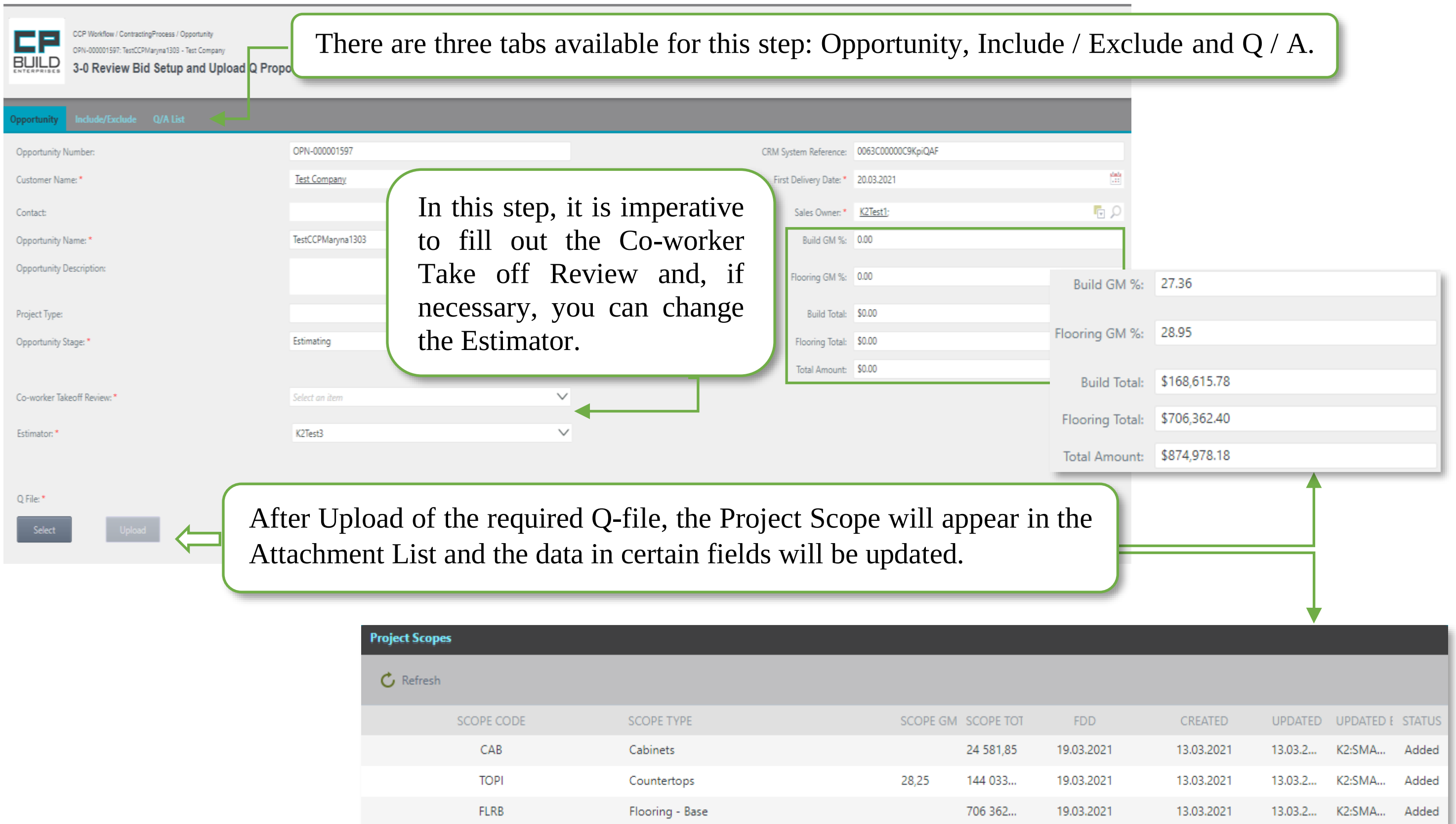


Screenshot - Lucid Chart – Step 56-0 Start Transition meeting – Contracting Process

If after Step "23-0 Send Submittal Package to Customer," the asynchronous step "56-0 Transition meeting" is not yet closed, the process will be blocked and will not be able to get to "23-1 Confirm Submittal Item All Complete".

3-0 Review Bid Setup and Upload Q Proposal

In Step 3-0, some fields are already filled in automatically with information from the Sales Force. All other fields will be filled in automatically after uploading the Q file at this step, or manually by the user. Look for details on the Opportunity tab. If needed, compare the current Quotation file to previous version on Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 3-0 Review Bid Setup and Upload Q Proposal – Contracting Process

Action for Step 3-0 Review Bid Setup and Upload Q Proposal In this this step, the user needs to:

1. Select the required Co-Worker from the drop-down list "Co-worker Take off Review ". This field is required.
2. Select the required "Estimator" from the drop-down list (if user wants to assign task to another Estimator)

3. Select and Upload mandatory files, Price Quotation (Q-File). If the user selects the wrong document, click Cancel and try again.

* User can find a step-by-step description of uploading a file in the description of the "Form Images and descriptions".

4. Then Set the Action to “Assign Estimator”, “Release to Group”, “Rework” or “Submit Estimate,” then click Submit.

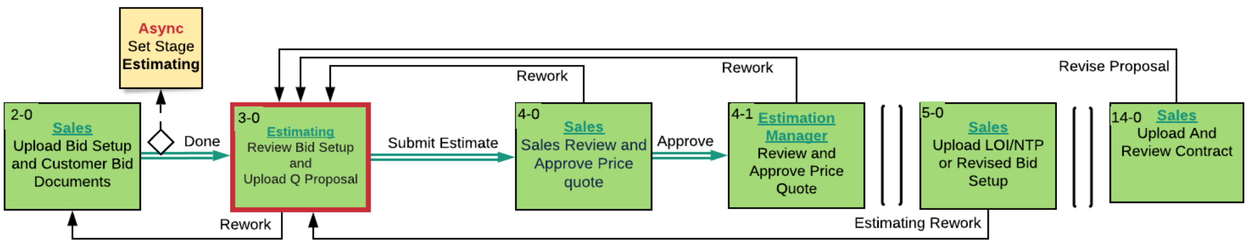
- The action **"Assign Estimator"** entrusts the task to another Estimator. For this to occur, the current Estimator must select the desired "Estimator" in the drop-down list. This action does not require uploading the Q file.

- The Action **"Release to Group"** returns the task to the group of estimators. This Action does not require uploading the Q-file.

- The **"Rework"** action returns to the “Upload Bid Setup and Customer Bid Documents” step.

*Note that the “Rework” Action requires a comment.

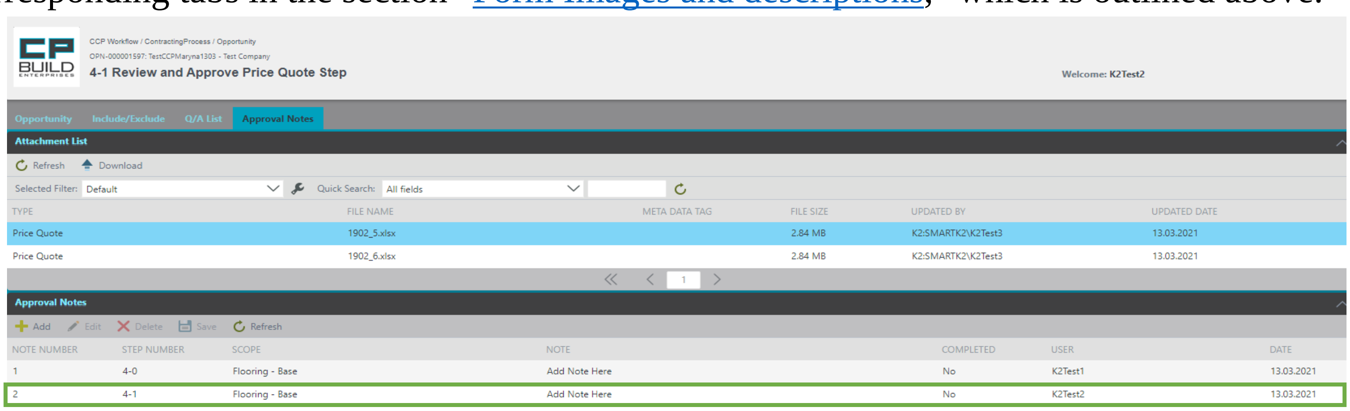
- The **"Submit Estimate"** action proceeds to the next step.



Screenshot - Lucid Chart – Step 3-0 Review Bid Setup and Upload Q Proposal – Contracting Process

4-1 Review and Approve Price Quotation

In order to proceed to the next step in the process, it is necessary that all Estimating Managers have completed the current step. When someone from the "Estimating Manager" selects the "Rework" action, the whole process will return to Step "3-0 Review Bid Setup and Upload Q Proposal". Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 4-1 Review and Approve Price Quotation – Contracting Process

Action for Step 4-1 Review and Approve Price Quotation

In this step, the user needs to:

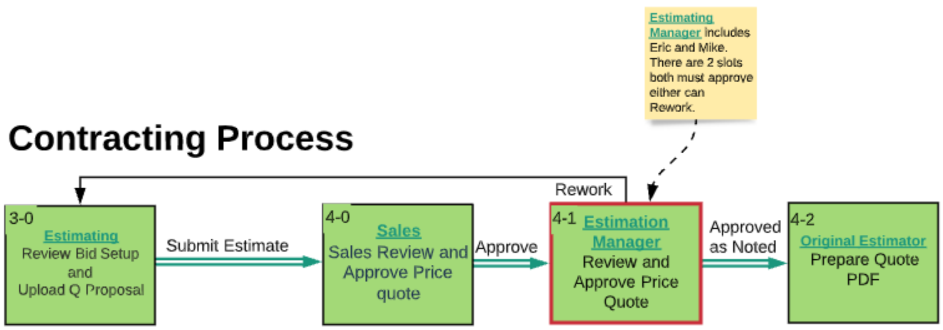
1. Complete and Save the Approval Conditions for the Scope in the Approval Notes tab. Then go to the "Opportunity" tab.

* The user can find a step-by-step description of how to work with the Approval Notes tab in "Form images and descriptions."

2. Set the Action “Approve as Noted” or “Rework” and click Submit.

- The **"Approve as Noted"** action proceeds to the next step.
- The Action **"Rework"** returns to the “Review Bid Setup and Upload Quotation” step.

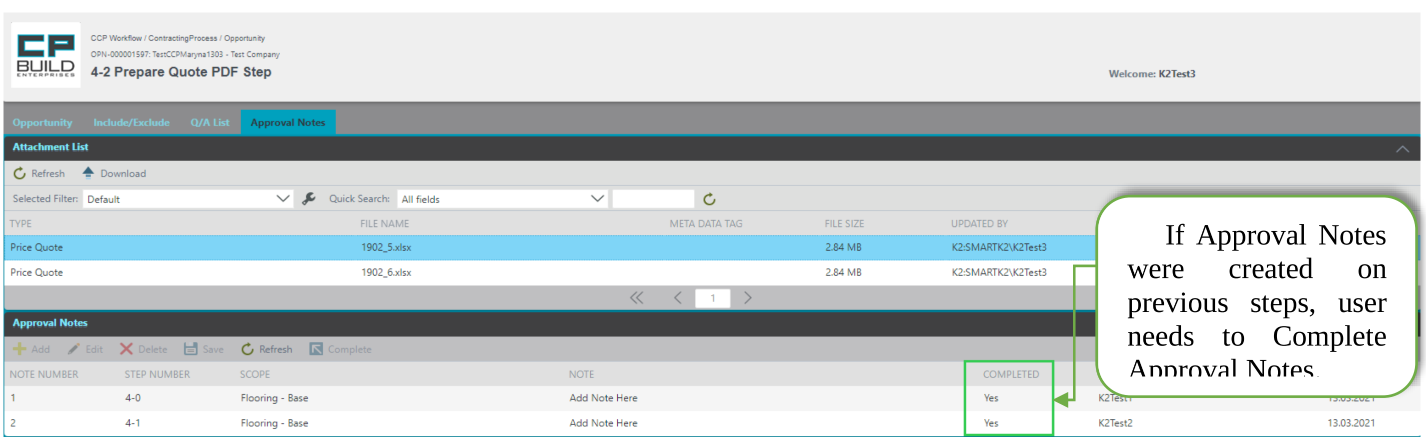
*Note that the “Rework” Action requires a comment.



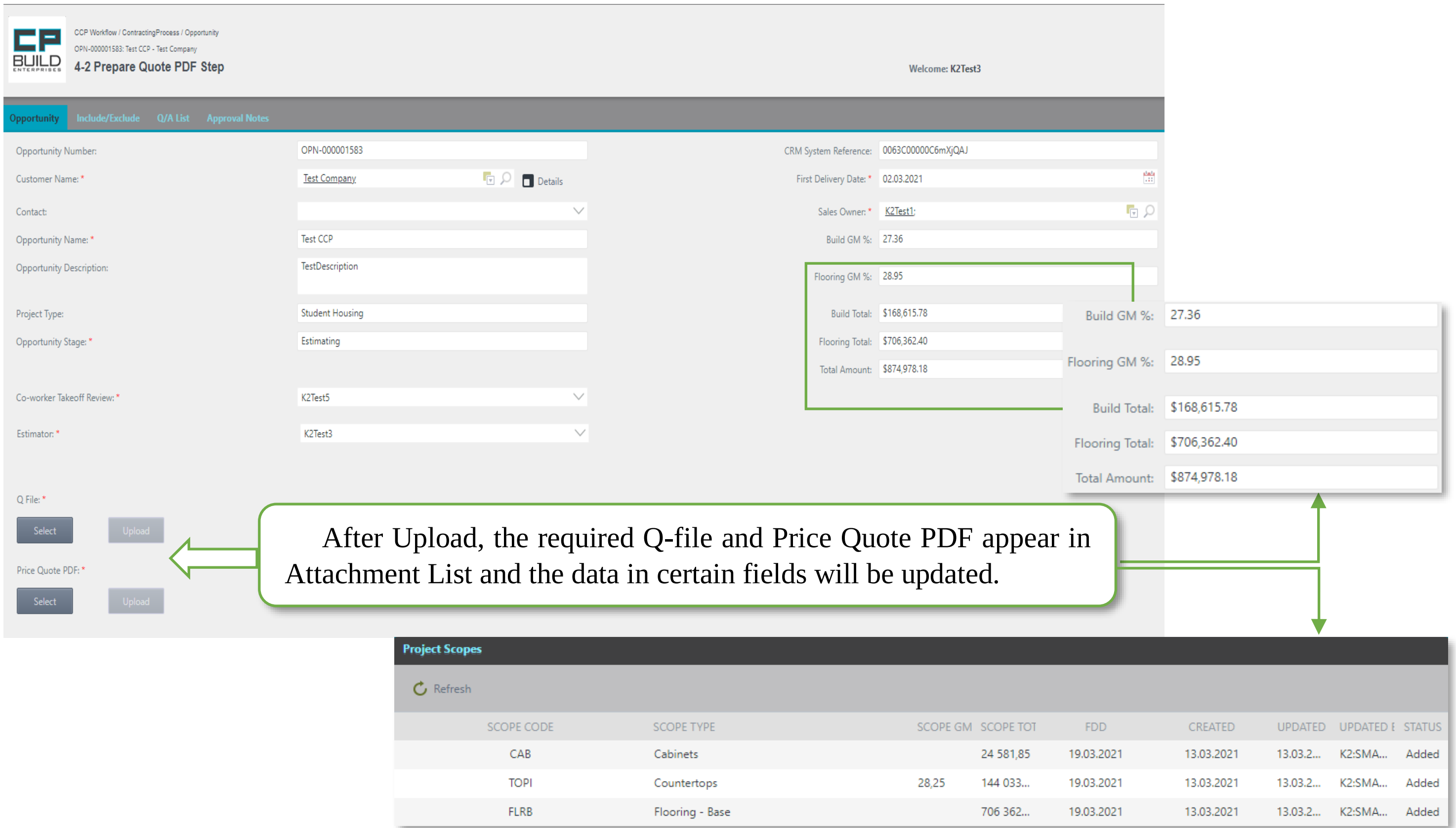
Screenshot - Lucid Chart – Step 4-1 Review and Approve Price Quotation – Contracting Process

4-2 Prepare Quotation PDF

This Step 4-2 Prepare Quotation PDF loads the Quotation file. The current version of the project supports the 5th version of the Quotation file templates. If the user tries to upload a different version of the proposal file, the system will issue a warning. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version the on Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 4-2 Prepare Quotation PDF – Contracting Process



Screenshot - Estimating – Step 4-2 Prepare Quotation PDF – Contracting Process

Action for Step 4-2 Prepare Quotation PDF

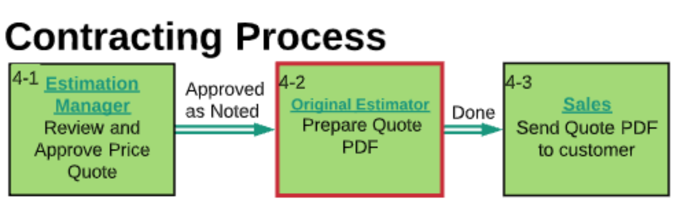
For this step, the user needs to:

1. On the Approval Notes tab, check Notes Completed. (to the method for performing this action is described in detail in the section "Form Images and descriptions.")

2. Then go to the Opportunity tab. Select and Upload the Quotation (Q-File) and Quotation PDFs. If the user selected the wrong document, click Cancel and try again.

3. Set the Action “Done” and click Submit.

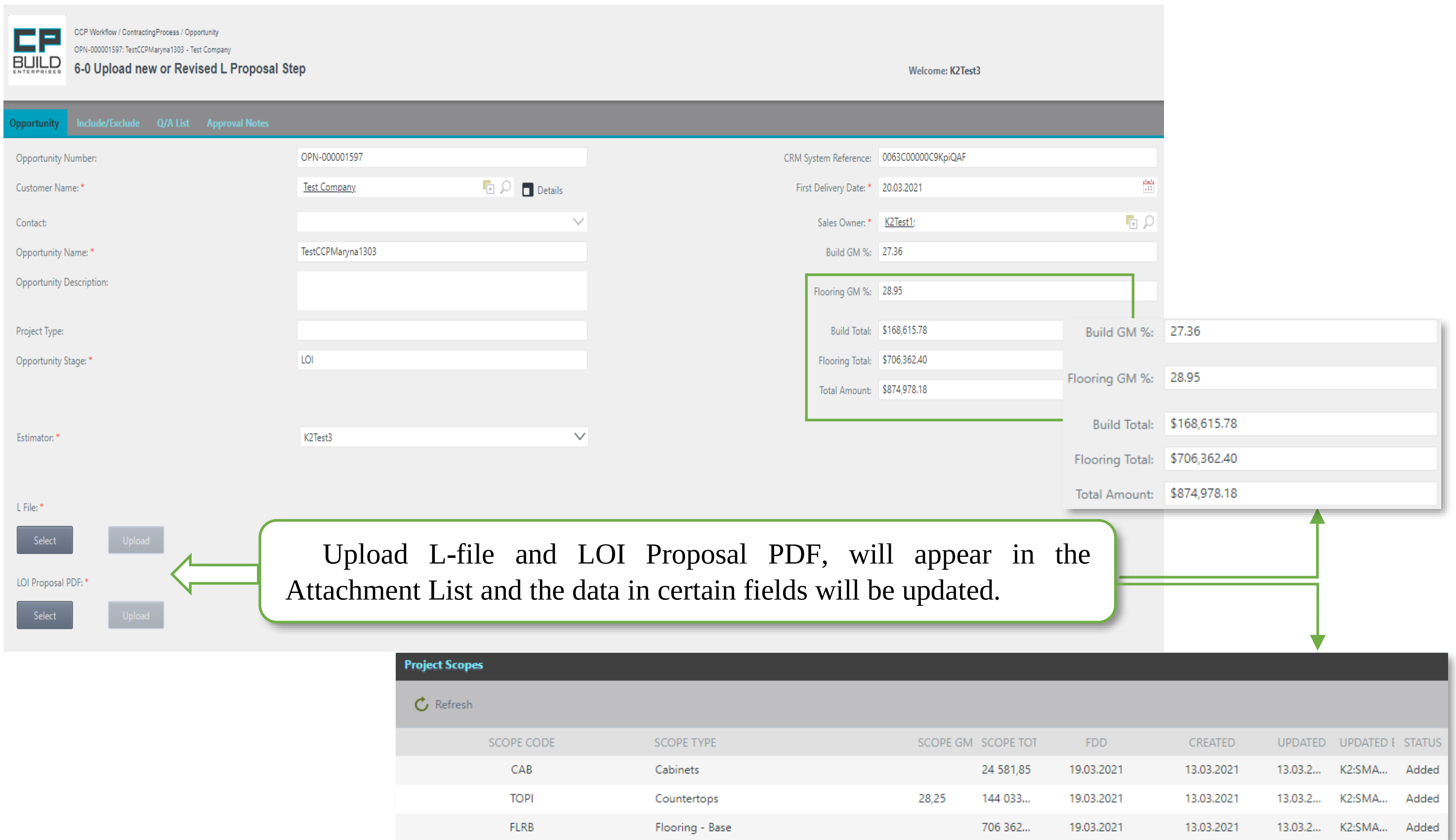
- The Action **"Done"** moves on to the next step.



Screenshot - Lucid Chart – Step 4-2 Prepare Quotation PDF – Contracting Process

6-0 Upload new or Revised L Proposal

This Step 6-0 Upload new or Revised L Proposal loads the Quotation file. The current version of the project supports the 5th version of the Quotations file templates. If the user tries to download a different version of the proposal file, the system will issue a warning. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 6-0 Upload new or Revised L Proposal – Contracting Process

Action for Step 6-0 Upload new or Revised L Proposal

In this step, the user needs to:

1. In the Opportunity tab, Select and Upload the LOI Proposal (L-File) and LOI Proposal PDF. If you select the wrong document, click Cancel and try again.

2. Set Action to "Assign Estimator", "Release to Group", "Rework" or "Submit Estimates" then click Submit.

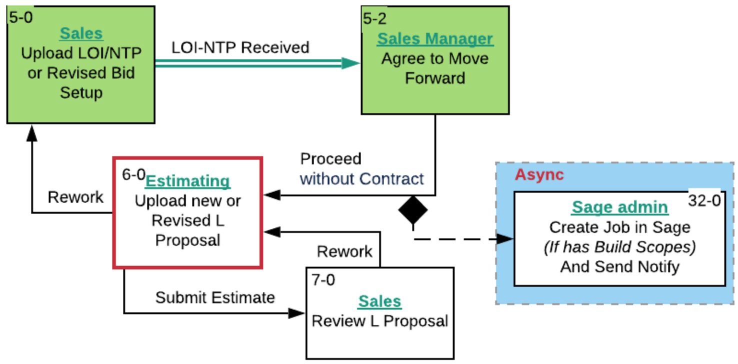
- The action **"Assign Estimator"** entrust the task to another Estimator. The current Estimator must select the desired "Estimator" in the drop-down list. This action does not require the uploading of the Q file.

- The Action **"Release to Group"** returns the task to the group of estimators. This Action does not require uploading the Q-file.

- The **"Rework"** action returns to the “Upload LOI-NTP or Revised Bid Setup” step;

*Note that the “Rework” Action requires a comment.

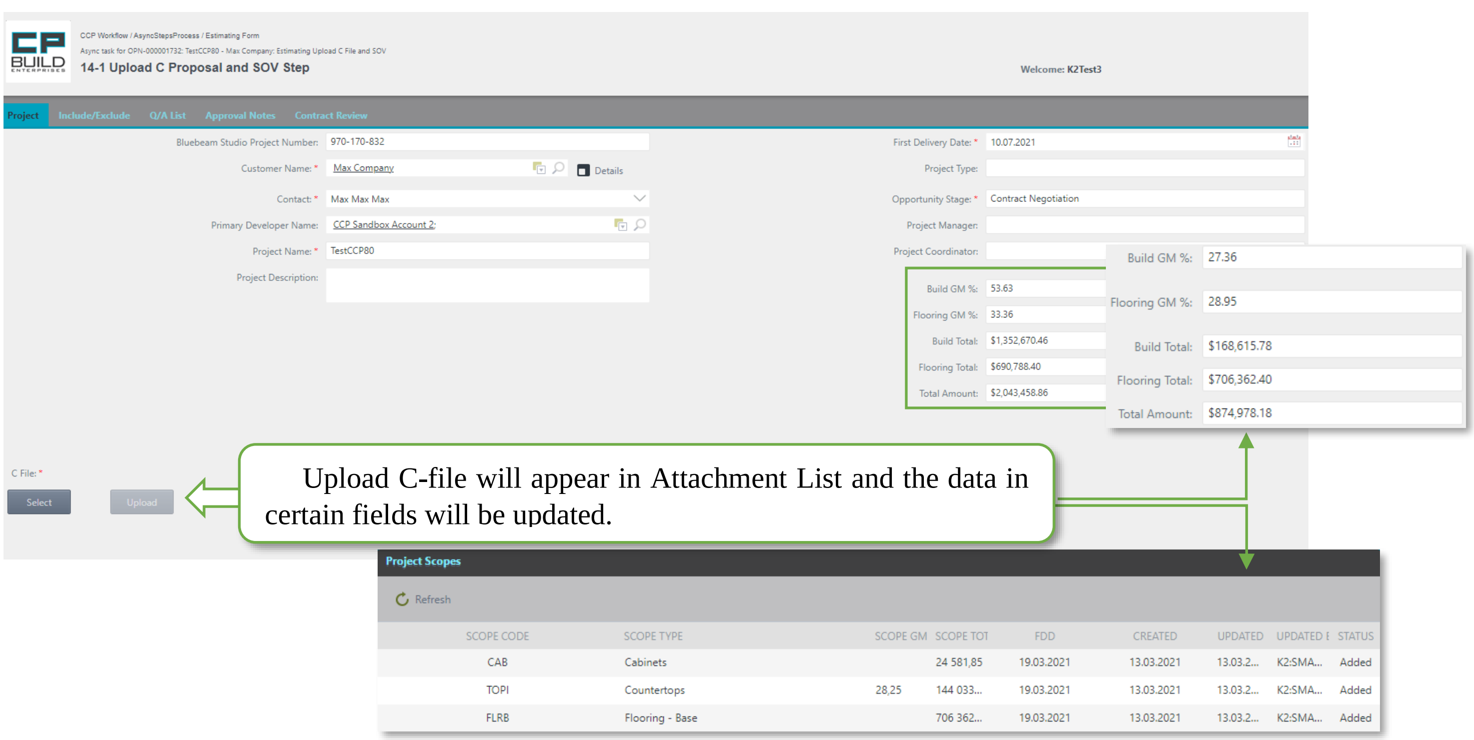
- The **"Submit Estimate"** action proceeds to the next step.



Screenshot - [Lucid Chart](#) – Step 6-0 Upload new or Revised L Proposal – Contracting Process

14-1 Upload C Proposal and SOV

This Step 14-1 Upload C Proposal and SOV loads the Quotation file. The current version of the project supports the 5th version of the Quotations file templates. If the user tries to upload a different version of the proposal file, the system will issue a warning. Step 14-1 is Upload C Proposal and SOV. Look on for the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 14-1 Upload C Proposal and SOV – Contracting Process

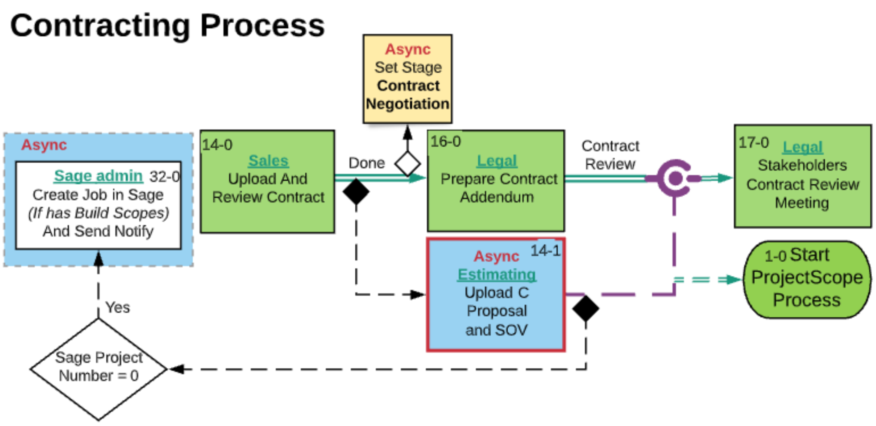
Action for Step 14-1 Upload C Proposal and SOV

In this this step, user needs to:

1. In the Opportunity tab, Select and Upload Clean Proposal (C File) document. If you Select the wrong document, click Cancel and try again.

* After uploading the file, the Project Scope data is updated automatically. When you Upload a Quotation file with updated Scopes List data, in which the Total Amount of any previously launched Scope is Null, this Scope Instance will be automatically finished.

2. Set the Action as "Done" and click Submit.
- The Action **"Done"** moves on to the next step.

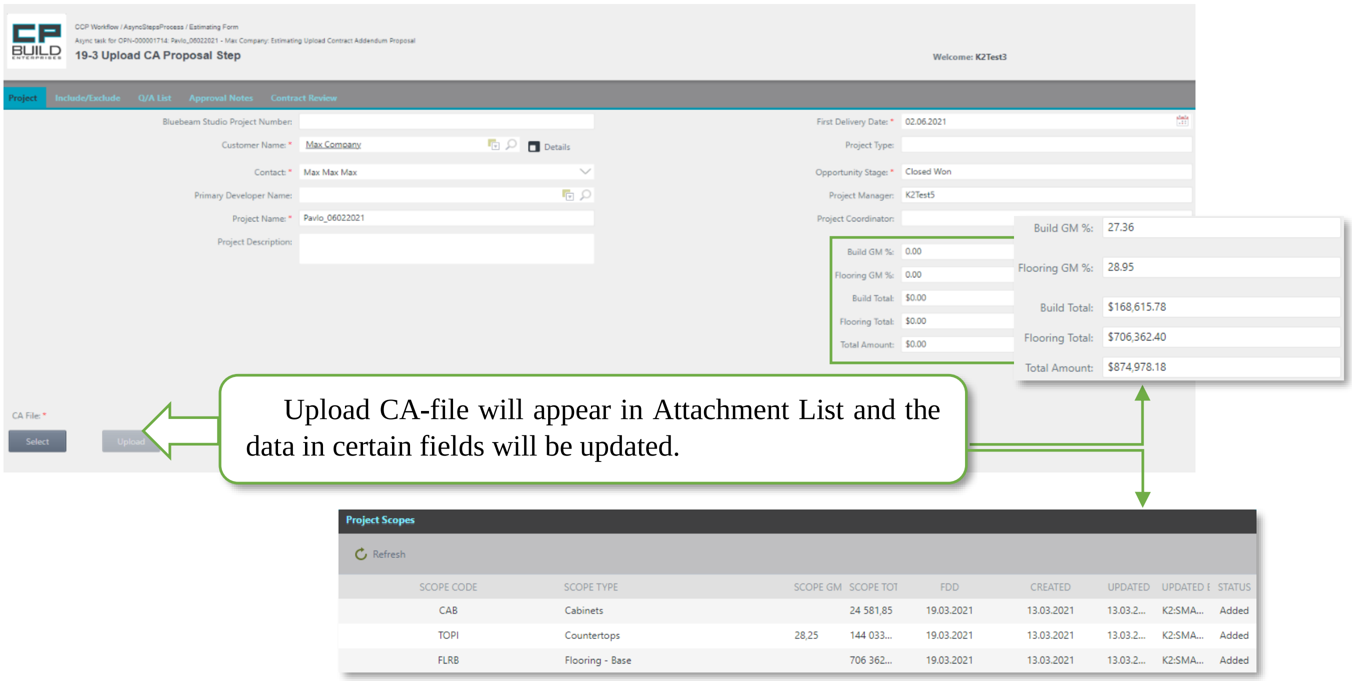


Screenshot - Lucid Chart – Step 14-1 Upload C Proposal and SOV – Contracting Process

If after Step "16-0 Prepare Contract Addendum," the asynchronous step "14-1 Upload C Proposal and SOV" is not yet closed, the process will be blocked and will not be able to get to "17-0 Stakeholders Contract Review Meeting Step ".

19-3 Upload CA Proposal Step

This Step 19-3 Upload CA Proposal loads the Quotation file. The current version of the project supports the 5th version of the Quotations file templates. If the user tries to upload a different version of the proposal file, the system will issue a warning. Look for the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 19-3 Upload CA Proposal – Contracting Process

Action for Step 19-3 Upload CA Proposal

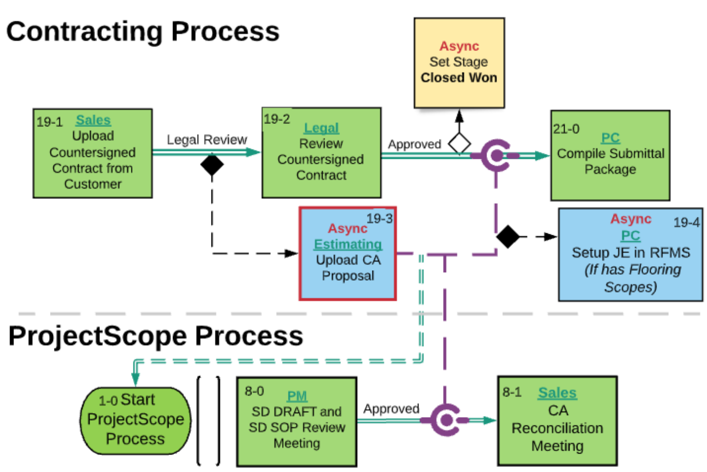
In this step, the user needs to:

1. In the Opportunity tab, [Select and Upload CA Proposal (CA File) document](). If you Select the wrong document, click Cancel and try again.

* After uploading the file, the Project Scope data is updated automatically. When you Upload a Quotation file with updated Scopes List data, in which the Total Amount of any previously launched Scope is Null, this Scope Instance will be automatically finished.

2. Set the Action as "Done" and click Submit.

- The Action **"Done"** moves on to the next step.

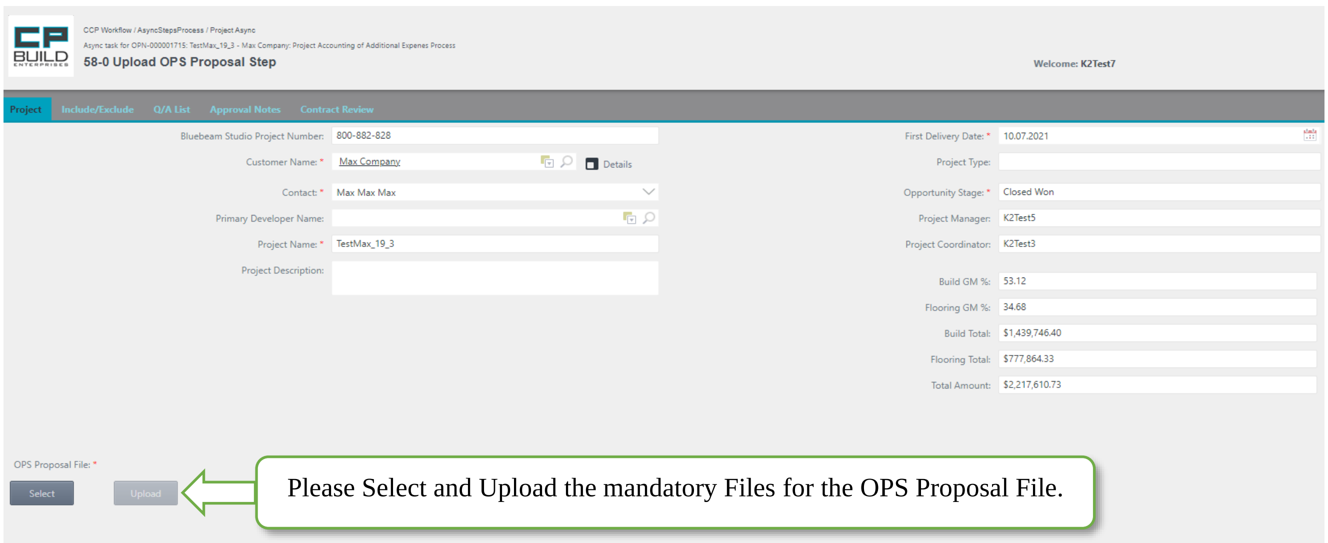


Screenshot - - [Lucid Chart]() – Step 19-3 Upload CA Proposal– Contracting Process

If after Step "19-2 Review Countersigned Contract Step, " the asynchronous step "19-3 Upload CA Proposal Step " is not yet closed, the process will be blocked and will not be able to get to "21-0 Compile Submittal Package Step ".

58-0 Upload OPS Proposal Step

Step 58-0 Upload OPS Proposal meeting. Look for the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

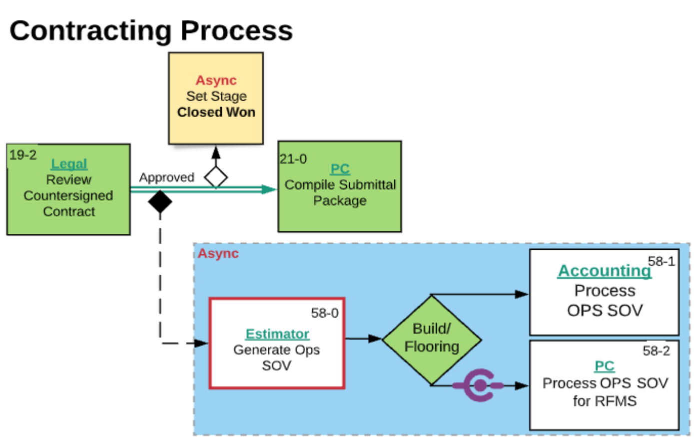


Screenshot - Estimating – Step 58-0 Upload OPS Proposal – Contracting Process

Action for Step 58-0 Upload OPS Proposal

In this step, the user needs to:

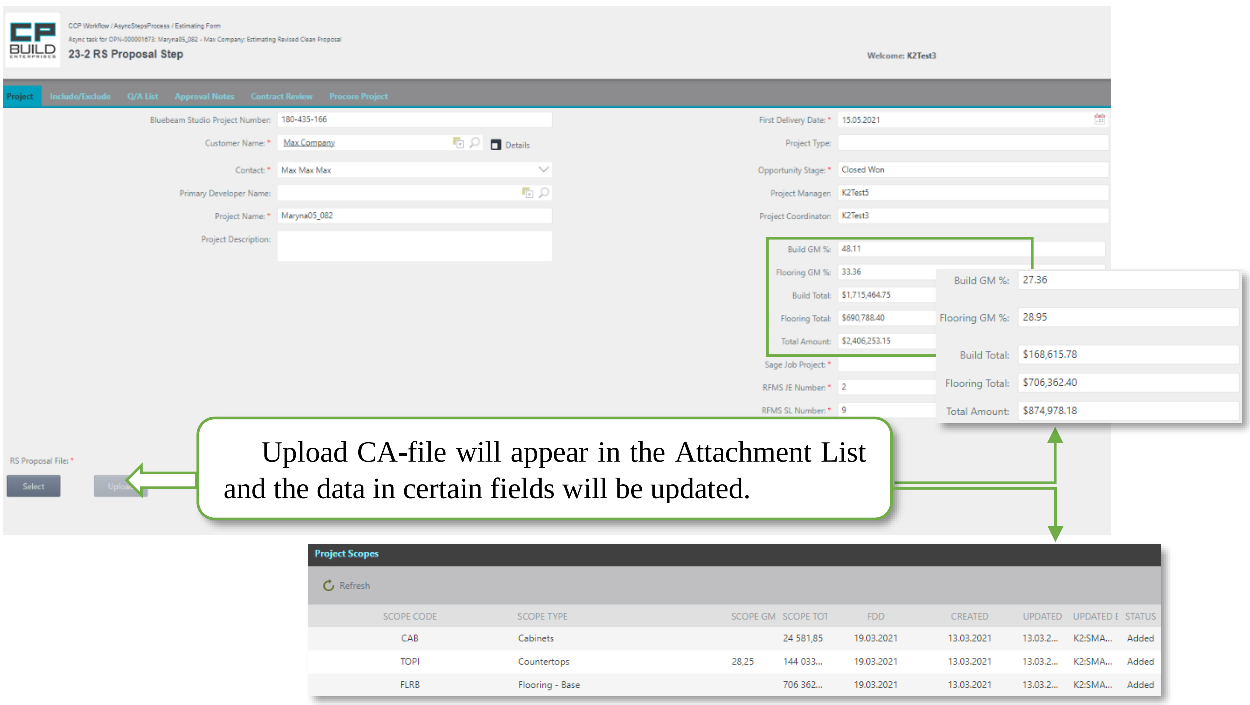
1. In Opportunity tab, Select and Upload the "OPS Proposal File". If you Select the wrong document, click Cancel and try again.
2. Set Action to **"Done"** and click Submit.
   - The Action **"Done"** moves on to the next step.



Screenshot - Lucid Chart – Step 58-0 Upload OPS Proposal – Contracting Process

23-2 RS Proposal Step

This Step 23-2 RS Proposal loads the Quotation file. The current version of the project supports the 5th version of the Quotations file templates. If the user tries to download a different version of the proposal file, the system will issue a warning. Look for the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Estimating – Step 23-2 RS Proposal – Contracting Process

Action for Step 23-2 RS Proposal

In this this step, the user needs to:

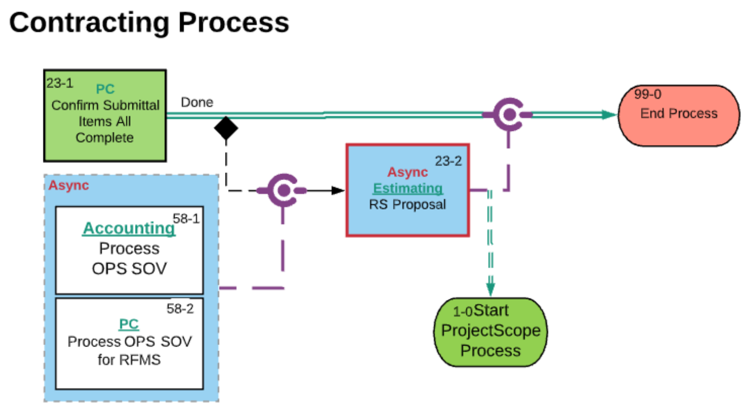
1. In the opportunity tab, Select and Upload the RS Proposal File document. If you Select the wrong document, click Cancel and try again.

* After uploading the file, the Project Scope data is updated automatically. When you Upload a Quotation file with updated Scopes List data, in which the Total Amount of any previously launched Scope is Null, this Scope Instance will be automatically finished.

2. On the Approval Notes tab, check Notes Completed. (The explanation of how to perform this action is described in detail in the section "Form images and descriptions.")

3. Set the Action as "Done" and click Submit.

- The Action **"Done"** moves on to the next step.



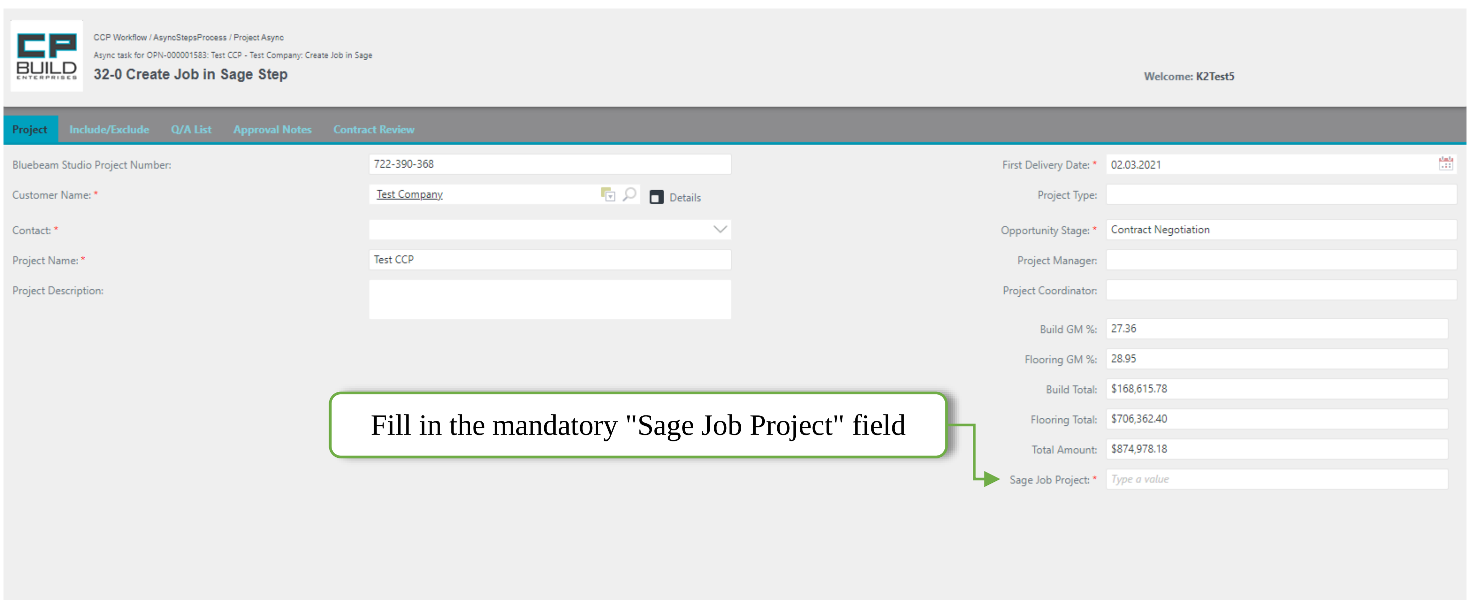
Screenshot - - [Lucid Chart](#) – Step 23-2 RS Proposal – Contracting Process

If after Step "23-1 Confirm Submittal Items All Complete Step " the asynchronous step "23-2 RS Proposal Step " is not yet closed, the process will be blocked and will not be able to get to "End Process."

Sage admin

32-0 Create Job in Sage

Step 32-0 fill in mandatory "Sage Job Project" field. Look at the details on the Opportunity tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab or Add Notes to Scopes on the Approval Notes tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



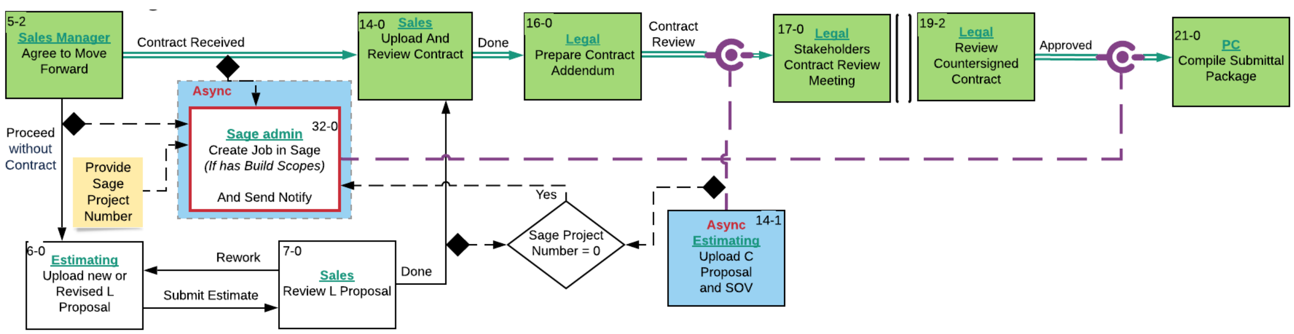
Screenshot – Sage admin – Step 32-0 Create Job in Sage – Contracting Process

Action for Step 32-0 Create Job in Sage

1. On the Opportunity tab, fill in the mandatory "Sage Job Project" field.

2. Set Action to "Create Sage Project" and click Submit.

- **Create Sage Project** moves on to the next step.



Screenshot - - Lucid Chart – Step 32-0 Create Job in Sage – Contracting Process

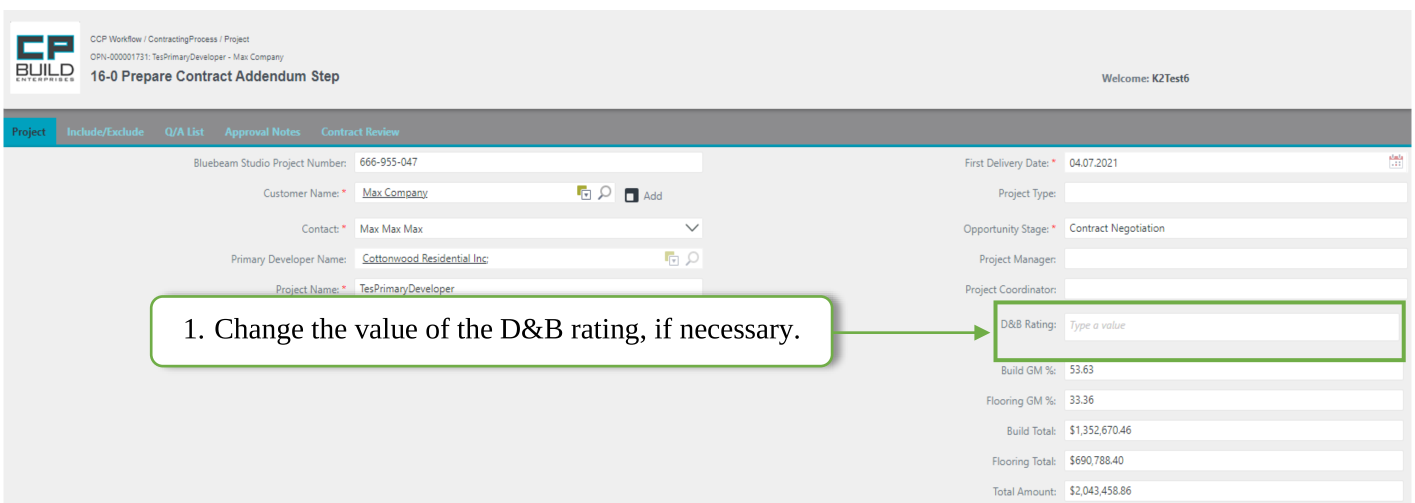
If after Step "16-0 Prepare Contract Addendum " the asynchronous step "32-0 Create Job in Sage " is not yet closed, the process will be blocked and will not be able to get to "17-0 Stakeholders Contract Review Meeting"

Legal

16-0 Prepare Contract Addendum

Step 16-0 is necessary to generate "Contract Review Checklist PDF" on the Contract Review tab. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

Screenshot – Legal – Step 16-0 Prepare Contract Addendum – Contracting Process



Screenshot – Legal – Step 16-0 Prepare Contract Addendum – Contracting Process

Action for Step 16-0 Prepare Contract Addendum

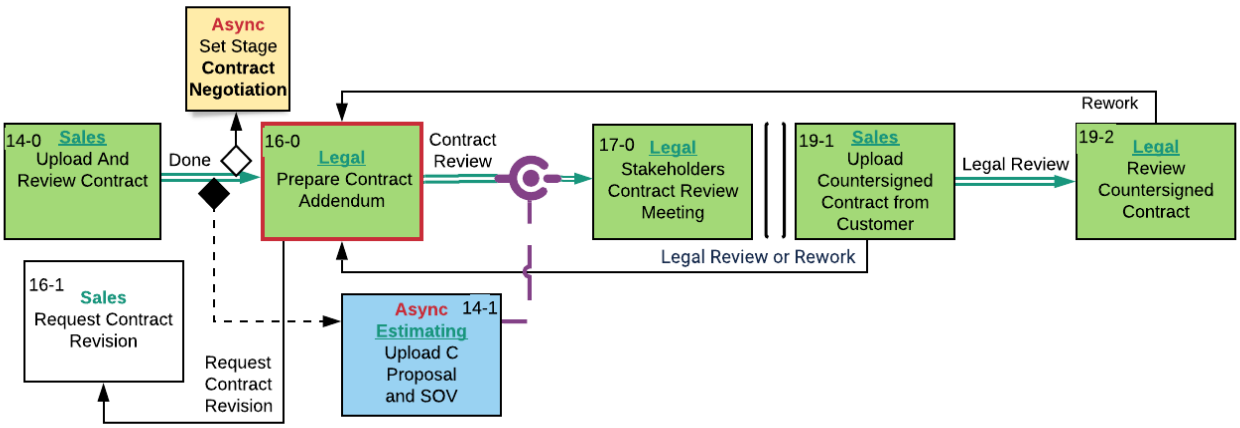
In this step, the user needs to:

1. On the Contract Review tab, Click the Edit button after entering all the information known to the user in the right column, click the Save button, then Download the PDF with the

checklist. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

2. Go to the Project tab. The User can also change the D&B Rating value.
3. Set Action to "Request Contract Revision" or "Contract Review" and click Submit.
   - The Action **"Contract Review"** moves on to the "Stakeholders Contract Review Meeting" step.
   - The Action **"Request Contract Revision"** moves on to the "Request Contract Revision" step.

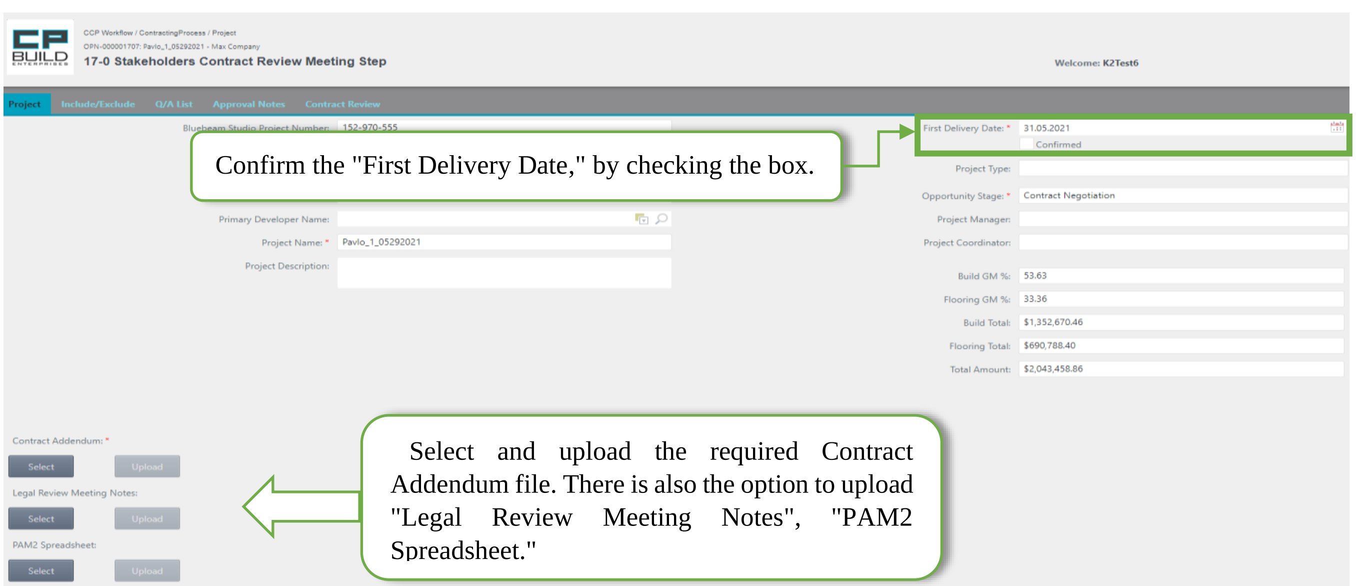
*Note: "Request Contract Revision" Action requires a comment.



Screenshot - - Lucid Chart – Step 16-0 Prepare Contract Addendum – Contracting Process

17-0 Stakeholders Contract Review Meeting

Step 17-0 Stakeholders Contract Review Meeting. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

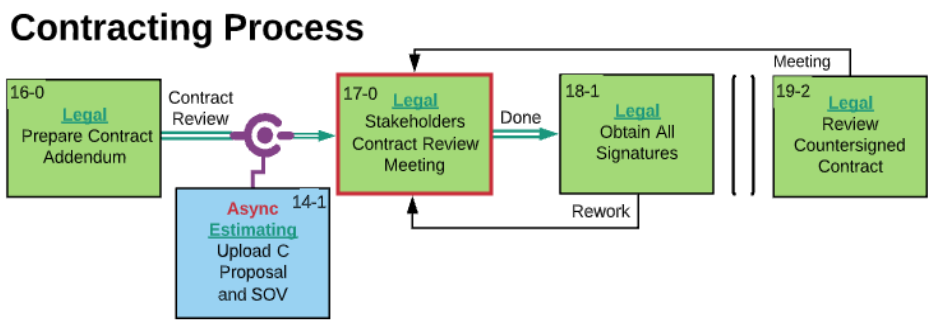


Screenshot – Legal – Step 17-0 Stakeholders Contract Review Meeting – Contracting Process

Action for Step 17-0 Stakeholders Contract Review Meeting

In this step, the user needs to:

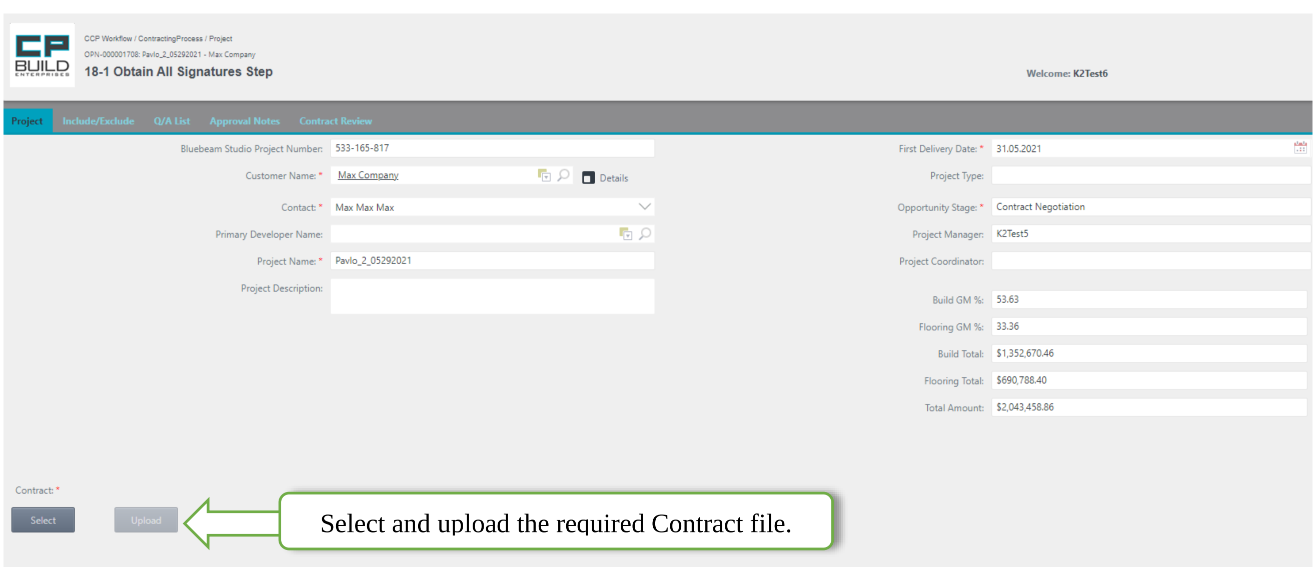
1. On the Project tab, Select and Upload the required Contract Addendum file. There is also the option of uploading "Legal Review Meeting Notes", "PAM2 Spreadsheet.". If you selected the wrong document, click Cancel and try again.
2. Confirm the "First Delivery Date," by checking the box.
3. Set the Action as "Done" and click Submit.
   - The Action **"Done"** changes the Stage to “Proposal”. It moves on to the next step.



Screenshot - - Lucid Chart – Step 17-0 Stakeholders Contract Review Meeting – Contracting Process

18-1 Obtain All Signatures Step

Step 18-1 Obtain All Signatures. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Legal – Step 18-1 Obtain All Signatures – Contracting Process

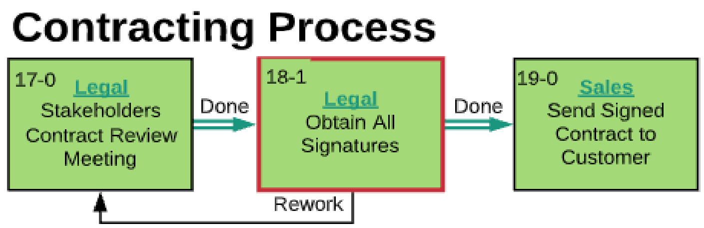
Action for Step 18-1 Obtain All Signatures

In this step, the user needs to:

1. On the Project tab, Select and Upload the Signed Scanned “Contract” PDF document. If you selected the wrong document, click Cancel and try again.

2. Set the Action to “Done” or “Rework” and click Submit.

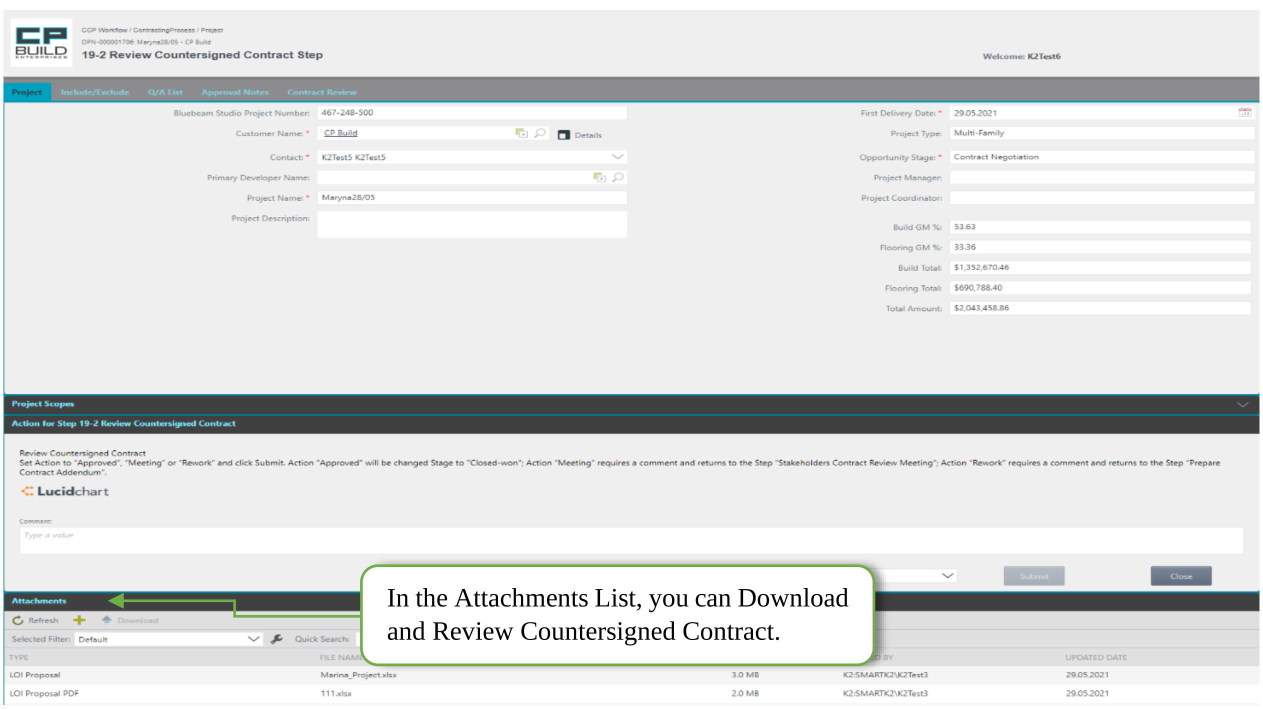
- The Action **"Done"** moves on to the next step.
- The Action **"Rework"** returns to the “Stakeholders Contract Review Meeting “step.
*Note that the “Rework” Action requires a comment.



Screenshot - Lucid Chart – Step 18-1 Obtain All Signatures – Contracting Process

19-2 Review Countersigned Contract Step

Step 19-2 Review Countersigned Contract. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - Legal – Step 19-2 Review Countersigned Contract – Contracting Process

Action for Step 19-2 Review Countersigned Contract

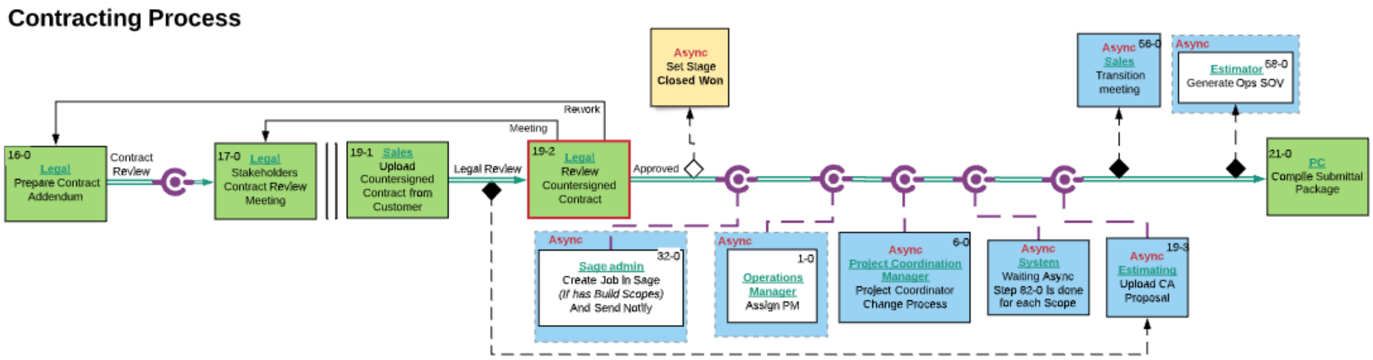
In this step, the user needs to:

1. On the Project tab, go down to the Attachments List. You can Download and Review the Countersigned Contract.

2. Set Action to “Approved”, “Meeting” or “Rework” and click Submit.

- The Action " **Approved** " changes the Stage to "Closed-won". It then moves on to the next step.
- The Action " **Meeting** " returns to the “ Stakeholder’s Contract Review Meeting “ step.
- The Action **"Rework"** returns to the “Prepare Contract Addendum“ step.

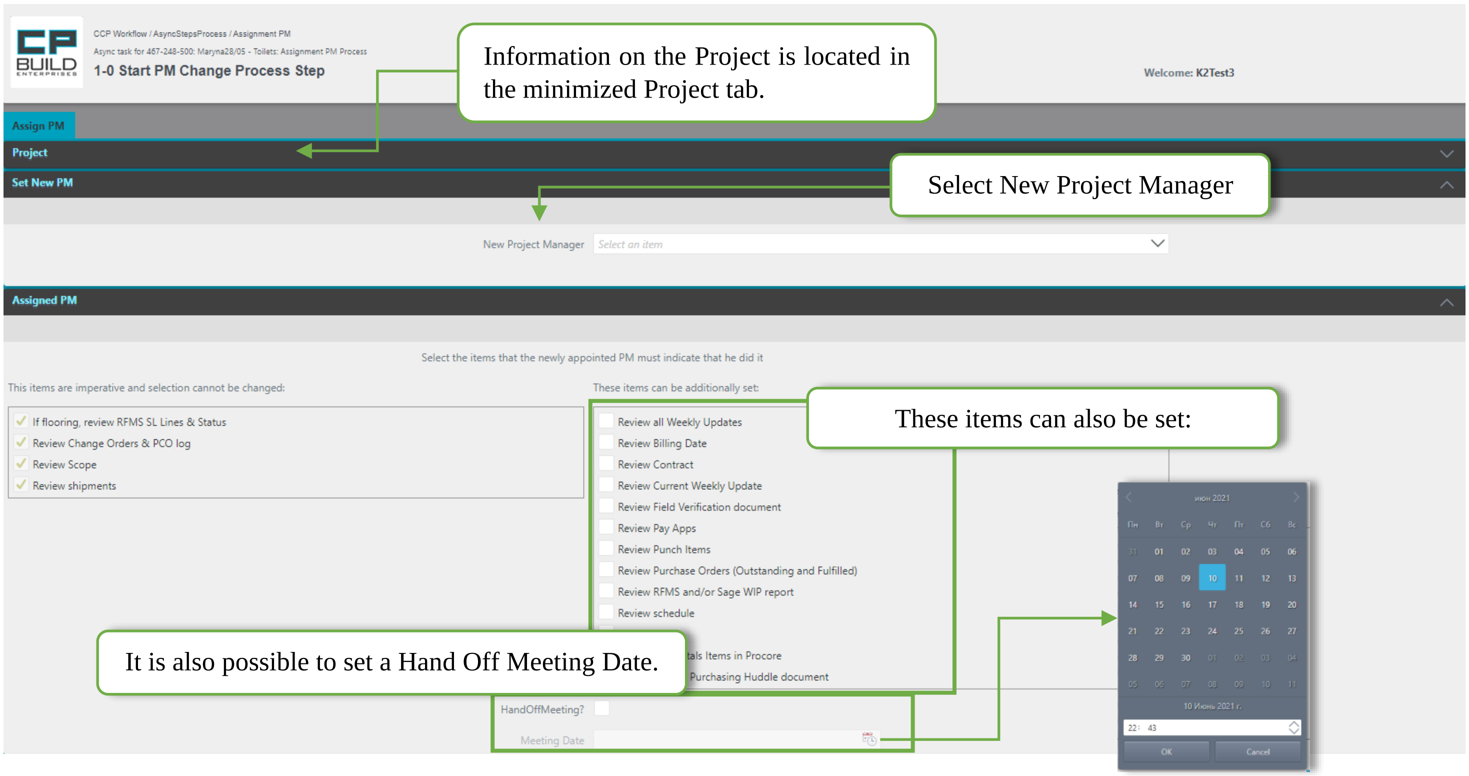
*Note that the “Rework”," Meeting " Action requires a comment.



Screen shot - Lucid Chart – Step 19-2 Review Countersigned Contract – Contracting Process

1-0 Start PM Change Process Step

Step 1-0 Start PM Change Process. The “Operations Manager” can initiate the process of assignment a “New project manager” before this step occurs using the “New Project Manager” button in the “My Project” menu. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



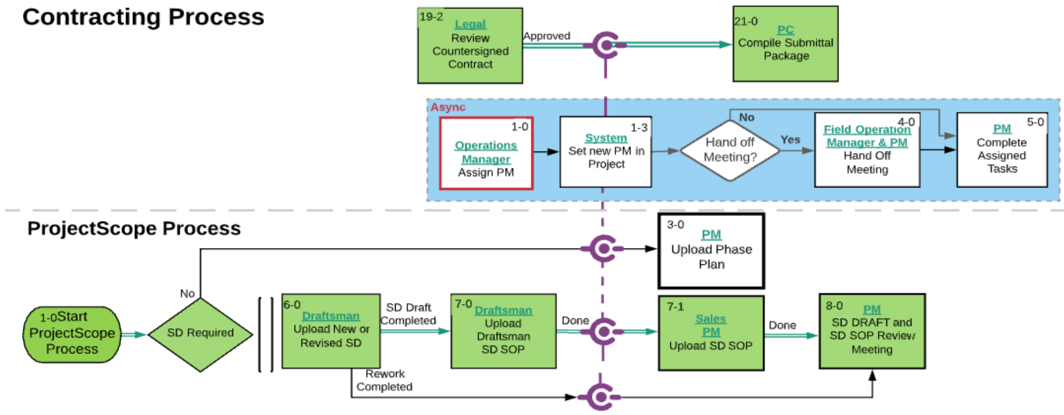
Screenshot – Operation Manager – Step 1-0 Start PM Change Process – Contracting Process

Action for Step 1-0 Start PM Change Process

In this step, the user needs to:

1. On the Assign PM tab, go down to the Set New PM List. In the drop-down, Select New Project Manager.
2. Optionally, select the items that the newly appointed PM should specify, by checking the additional "These items can be optionally checked" checkboxes.
3. If necessary, you can chec-box "Hand Off Meeting Date," while selecting the required date from the calendar and specifying the time of the meeting.
4. Set Action to “Start” and click Submit.

- The "**Start**" Action proceeds to the next asynchronous step.

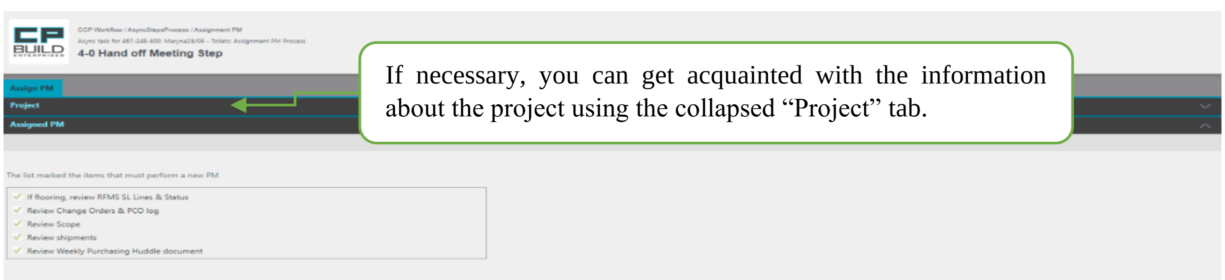


Screenshot - [Lucid Chart](#) – Step 1-0 Start PM Change Process – Contracting Process

If after Step "19-2 Review Countersigned Contract Step " the asynchronous step "1-0 Start PM Change Process " is not yet closed, the process will be blocked and will not be able to get to "21-0 Compile Submittal Package Step ".

4-0 Hand off Meeting Step

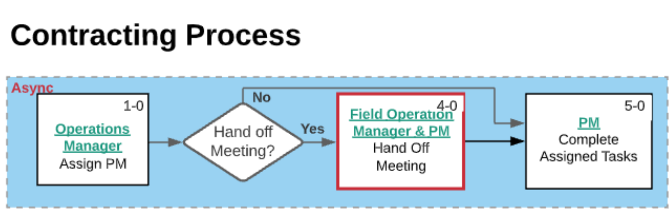
Step 4-0 Hand off Meeting. This step appears, if in “Step 1-0 Start PM Change Process” the “Hand Off Meeting Date” checkbox was selected, the required date was selected in the calendar and the time of the meeting was specified. If necessary, you can get acquainted with the information about the project using the collapsed “Project” tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



Screenshot – Operation Manager – Step 4-0 Hand off Meeting – Contracting Process

Action for Step 4-0 Hand-off Meeting In this step, the user needs to:

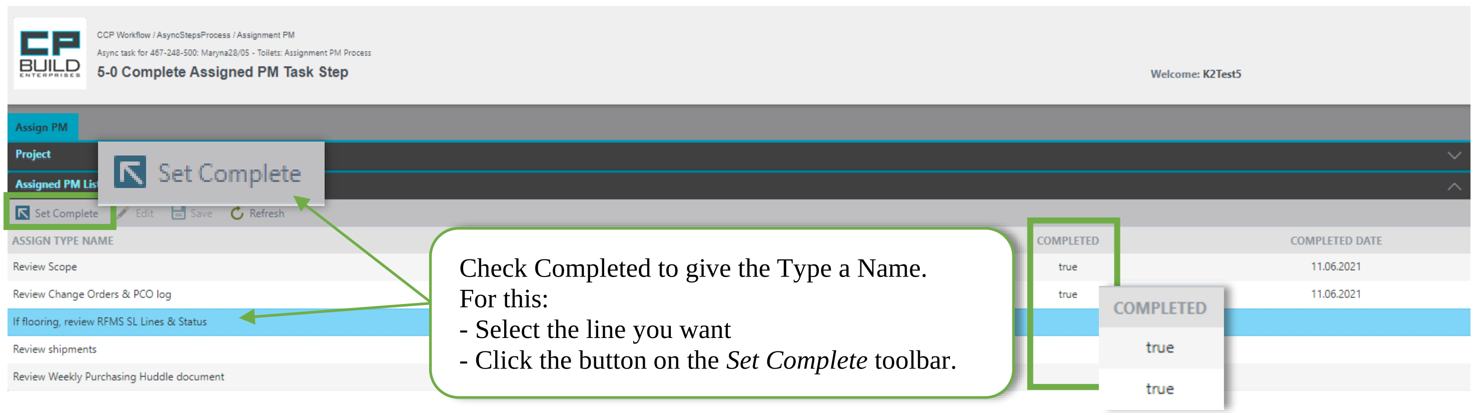
1. On the Assign PM tab, go down to the Assigned PM List. The list marked the items that must be performed by a new PM.
2. After the Hand off Meeting is done, set Action to “**Done**” and click Submit.



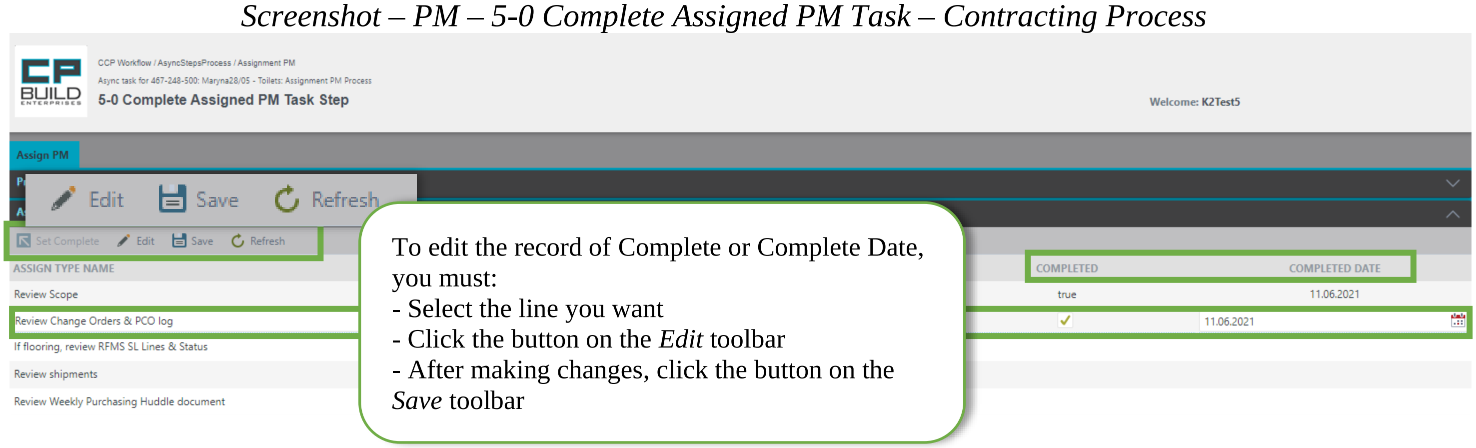
Screen shot - [Lucid Chart](#) – Step 4-0 Hand off Meeting – Contracting Process

5-0 Complete Assigned PM Task Step

Step 5-0 Complete Assigned PM Task. If necessary, you can get acquainted with the information about the project using the collapsed “Project” tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



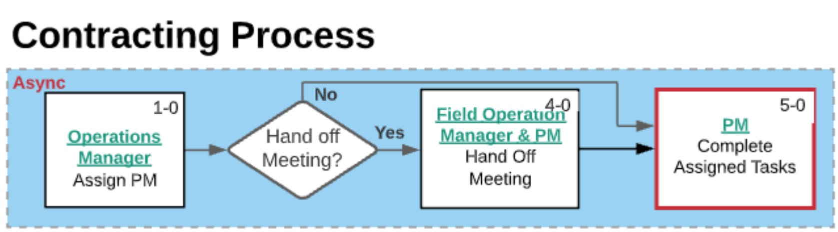
Screenshot – PM – 5-0 Complete Assigned PM Task – Contracting Process



Screenshot – PM – 5-0 Complete Assigned PM Task – Contracting Process

Action for Step 5-0 Complete Assigned PM Tas In this step, the user needs to:

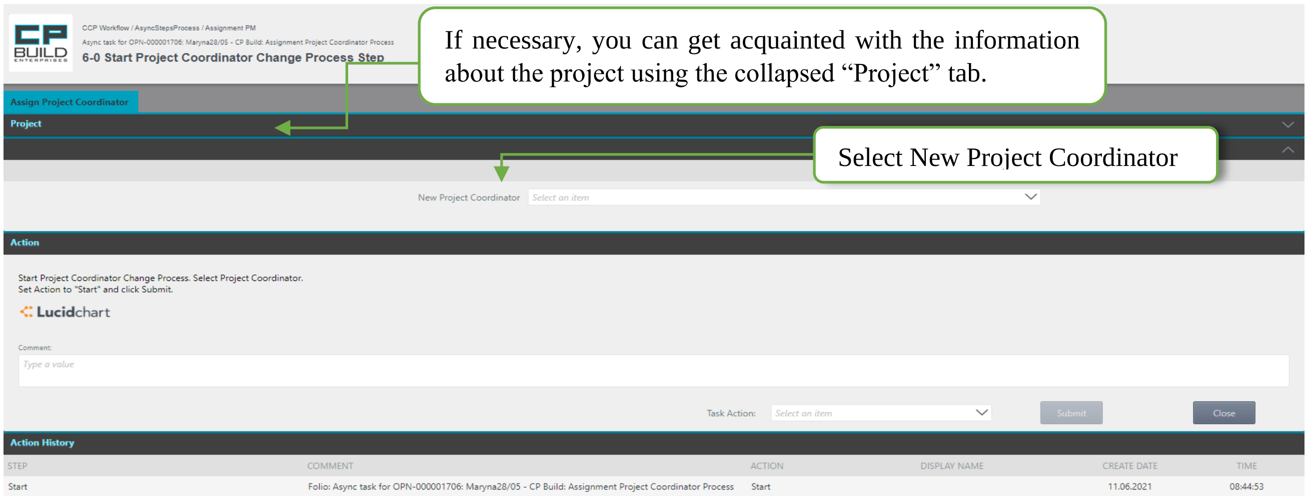
1. In the List Assigned PM, Set Complete for all Assign Type Names.
2. Set Action to “**Complete**” and click Submit.



Screenshot - [Lucid Chart](#) – 5-0 Complete Assigned PM Task – Contracting Process

6-0 Start Project Coordinator Change Process Step

Step 6-0 Start Project Coordinator Change Process. The Project Coordinator Manager can initiate the “New Project Coordinator assignment process” using the “New Project Coordinator” button on the My Project menu. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.

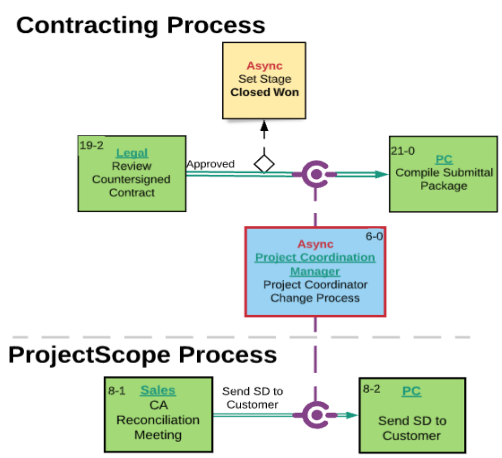


Screenshot – Project Coordinator Manager – Step 6-0 Start Project Coordinator Change Process – Contracting Process

Action for Step 6-0 Start Project Coordinator Change Process

In this step, the user needs to:

1. On the Assign Project Coordinator Tab in Drop-down, Select New Project Coordinator.
2. Set Action to “Start” and click Submit.

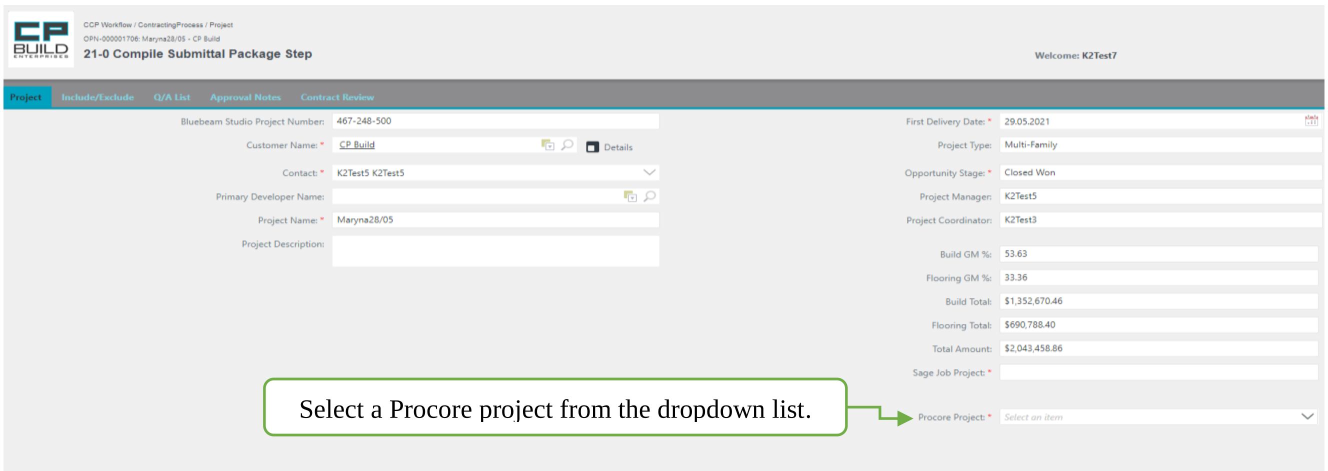


Screenshot - [Lucid Chart](#) – Step 6-0 Start Project Coordinator Change Process – Contracting Process

If after Step "19-2 Review Countersigned Contract Step" the asynchronous step "6-0 Start Project Coordinator Change Process" is not yet closed, the process will be blocked and will not be able to get to "21-0 Compile Submittal Package Step".

21-0 Compile Submittal Package Step

Step 21-0 Compile Submittal Package. If after Step "19-2 Review Countersigned Contract Step, Steps 82-0 have not yet been completed for each individual Scope in the project, the process will be blocked and will not be able to get to "21-0 Compile Submittal Package Step ". If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "[Form Images and descriptions](#)," which is outlined above.



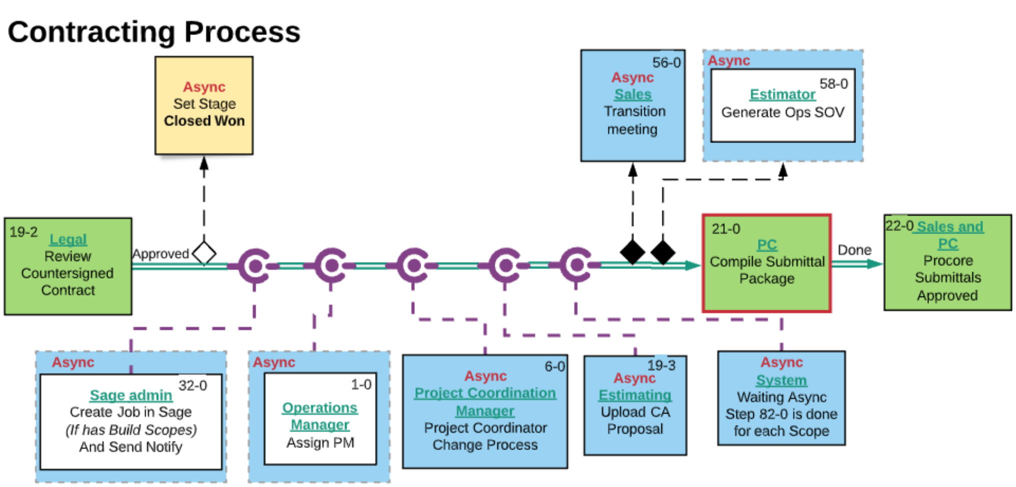
Screenshot - PC – Step 21-0 Compile Submittal Package – Contracting Process

Action for Step 21-0 Compile Submittal Package

In this step, the user needs to:

1. On the Project tab Select Procore Project and Compile Submittal Package.
2. Set Action to “Done” and click Submit.

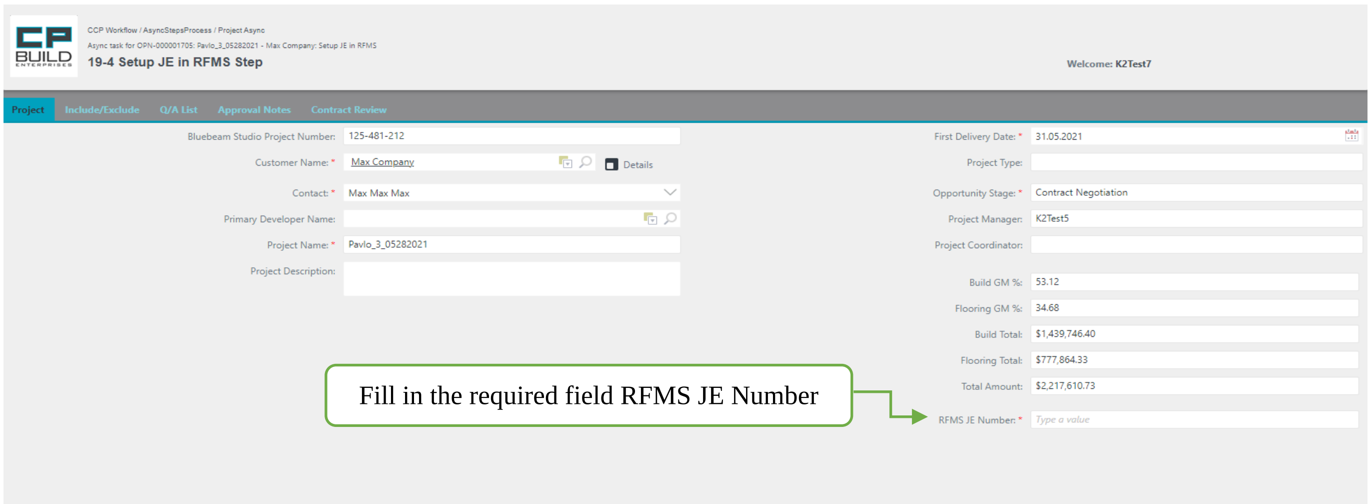
- The Action **"Done"** moves on to the next step.



Screenshot - [Lucid Chart](#) – Step 21-0 Compile Submittal Package – Contracting Process

19-4 Setup JE in RFMS Step

Step 19-4 Setup JE in RFMS. This step appears if Flooring Scopes has been loaded in the Project (at Step "19-3 Load CA Proposition"). If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



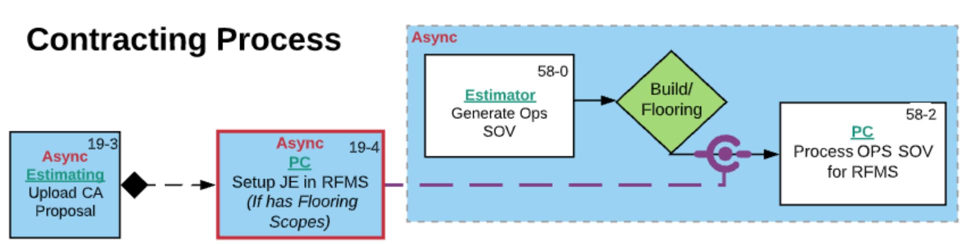
Screenshot - PC – Step 19-4 Setup JE in RFMS – Contracting Process

Action for Step 19-4 Setup JE in RFMS

In this step, the user needs to:

1. On the Project tab, fill in the required field RFMS JE Number.
2. Set Action to "Done" and click Submit.

- The Action **"Done"** moves on to the next step.

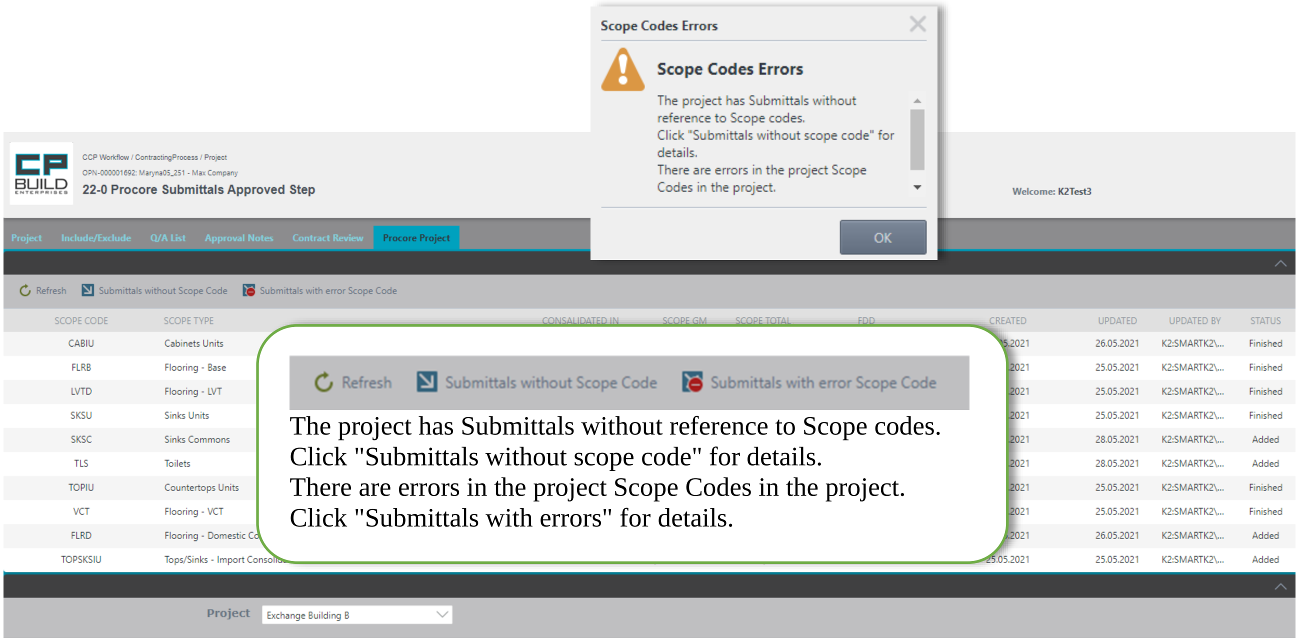


Screenshot - Lucid Chart – Step 19-4 Setup JE in RFMS – Contracting Process

If after Step "19-3 Upload CA Proposal " the asynchronous step " 19-4 Setup JE in RFMS " is not yet closed, the process will be blocked and will not be able to get to "58-2 Process OPS SOV for RFMS ".

22-0 Procore Submittals Approved Step

Step 22-0 Procore Submittals Approved the Procore Project tab is available. If needed, compare the current Quotation file to the previous version on the Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot - PC – Step 22-0 Procore Submittals Approved – Contracting Process

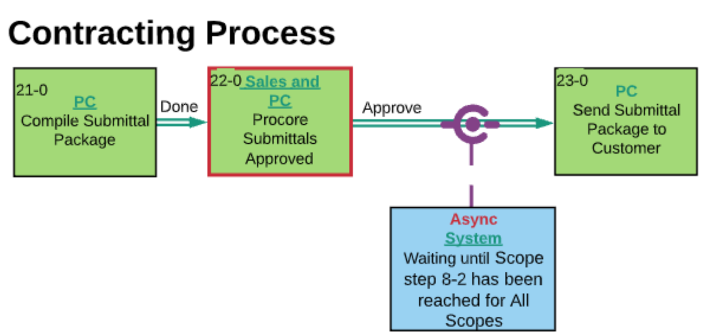
Action for Step 22-0 Procore Submittals Approved

In this step, the user needs to:

1. On the Procore Project tab, investigate Scope Code Errors, if any. Click "Submittals without scope code" for details. If the project has Submittals without reference to Scope codes, click "Submittals with errors" for details.

2. On the Project tab, set Action to “Approve” and click Submit.

- The Action **"Approve"** moves on to the next step.

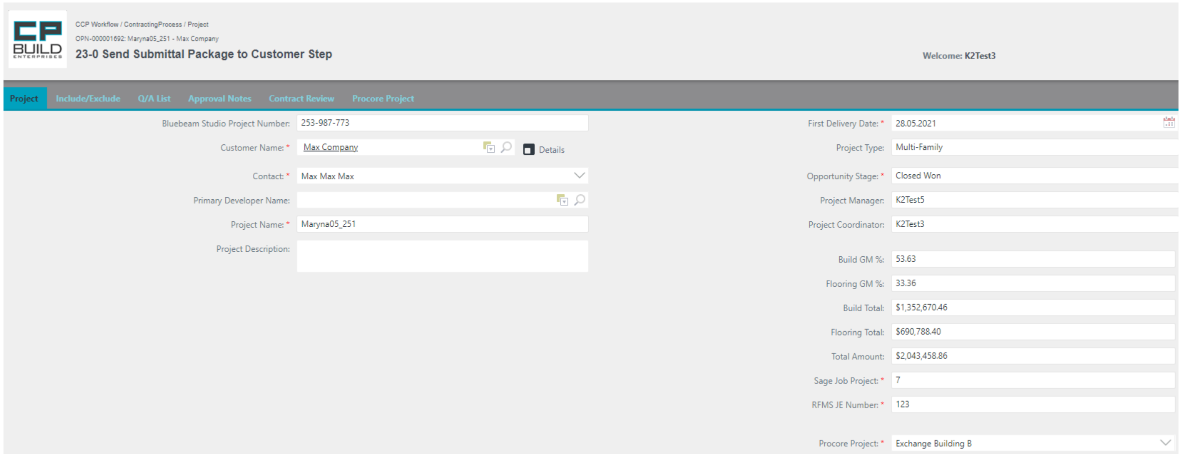


Screenshot - Lucid Chart – Step 22-0 Procore Submittals Approved – Contracting Process

23-0 Send Submittal Package to Customer Step

Step 23-0 Send Submittal Package to Customer. If after Step "22-0 Procore Submittals Approved," Steps 8-2 have not yet been reached for each individual Scope in the project, the process will be blocked and will not be able to get to "23-0 Send Submittal Package to Customer

Step". If needed, compare the current Quotation file to the previous version on Include/Exclude tab. Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



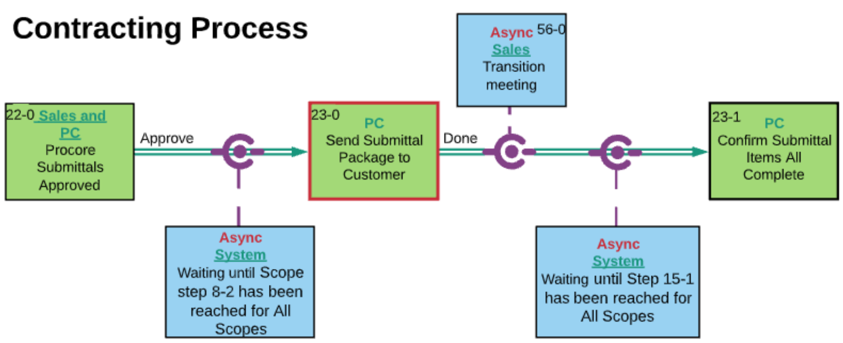
Screen shot - PC – Step 23-0 Send Submittal Package to Customer – Contracting Process

Action for Step 23-0 Send Submittal Package to Customer

In this step, the user needs to:

1. Send Submittal Package to Customer
2. On the Project tab, Set Action to "Done" and click Submit.

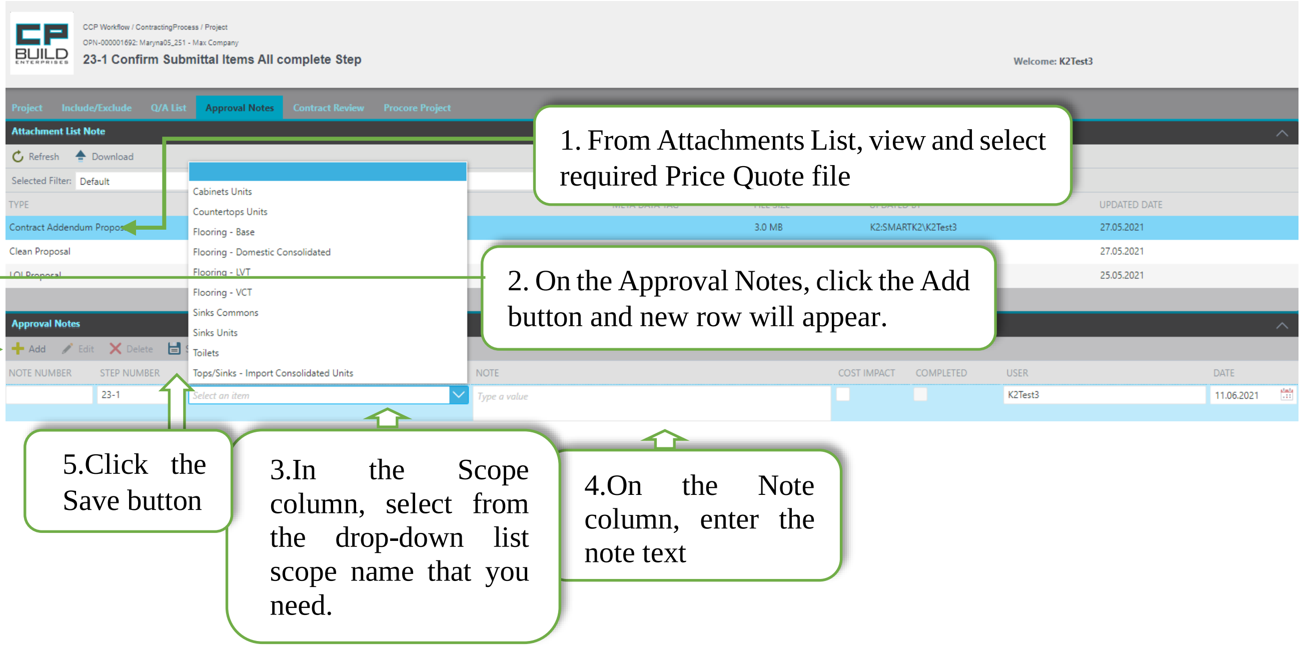
- The Action **"Done"** moves on to the next step.



Screenshot - Lucid Chart – Step 23-0 Send Submittal Package to Customer – Contracting Process

23-1 Confirm Submittal Items All Complete Step

Step 23-1 Confirm Submittal Items All complete. If after Step "23-0 Send Submittal Package to Customer Step," Steps 15-1 have not yet been reached for each individual Scope in the project, the process will be blocked and will not be able to get to "23-1 Confirm Submittal Items All Complete Step". If needed, compare the current Quotation file to the previous version on the Include/Exclude tab; Ask a question on the Q/A List tab. The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



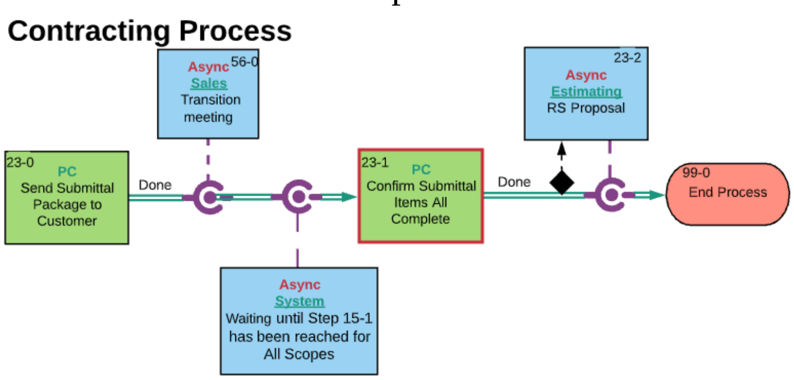
Screenshot - PC – Step 23-1 Confirm Submittal Items All complete – Contracting Process

Action for Step 23-1 Confirm Submittal Items All complete

In this step, the user needs to:

1. Confirm that Submittal Items are All complete
2. On the Approval Notes tab add notes, if needed (Screens shot - PC – Step 23-1 Confirm Submittal Items All complete – Contracting Process)
3. On the Project tab, set Action to “Done” and click Submit.

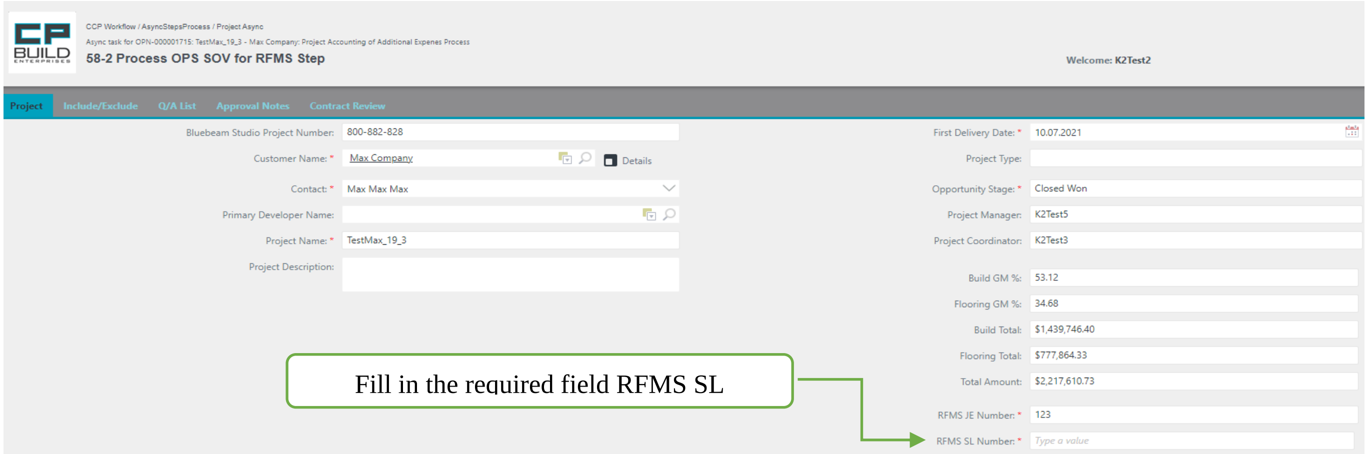
- The Action **"Done"** moves on to the next step.



Screenshot - Lucid Chart – Step 23-1 Confirm Submittal Items All complete – Contracting Process

58-2 Process OPS SOV for RFMS Step

Step 58-2 Process OPS SOV for RFMS. This step appears, if Flooring Scopes have been loaded in the Project (at Step "19-3 Load CA Proposition"). The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.

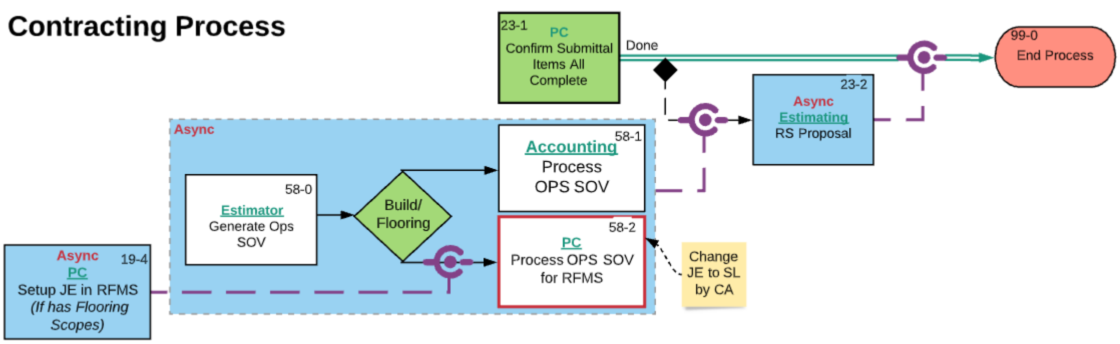


Screenshot – PC – 58-2 Process OPS SOV for RFMS – Contracting Process

Action for Step 58-2 Process OPS SOV for RFMS

In this step, the user needs to:

1. On the Project tab, fill in the required field RFMS SL Number.
2. Set Action to “**Done**” and click Submit.



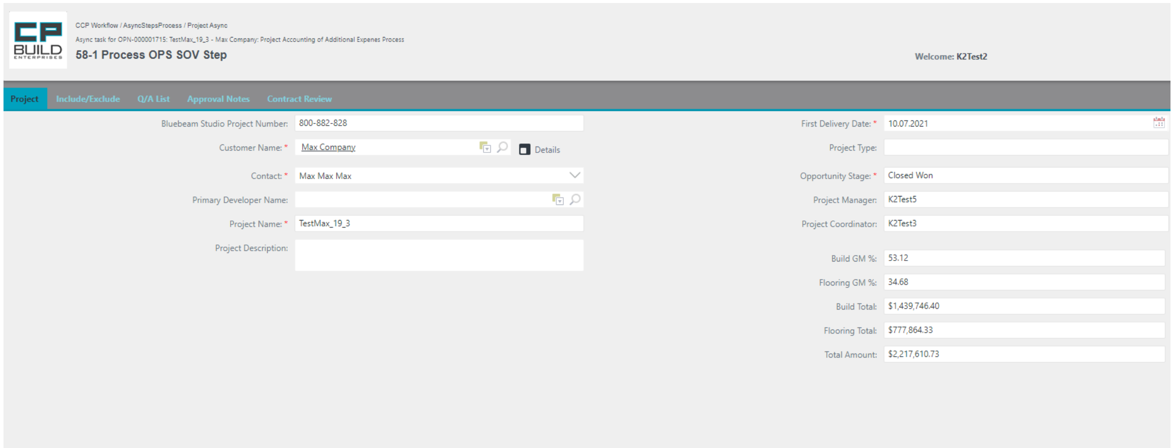
Screenshot - Lucid Chart – 58-2 Process OPS SOV for RFMS – Contracting Process

If after Step "58-0 Upload OPS Proposal " the asynchronous step "58-2 Process OPS SOV for RFMS " is not yet closed, the process will be blocked and will not be able to get to "23-2 RS Proposal. "

Accounting

58-1 Process OPS SOV Step

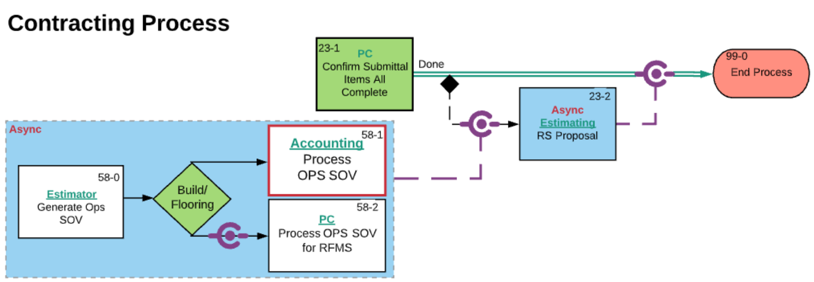
Step 58-1 Process OPS SOV. This step appears if Build Scopes has been loaded in the Project (at Step "19-3 Load CA Proposition"). The user can learn how to work with the corresponding tabs in the section "Form Images and descriptions," which is outlined above.



Screenshot – Accounting – 58-1 Process OPS SOV – Contracting Process

Action for Step 58-1 Process OPS SOV In this step, the user needs to:

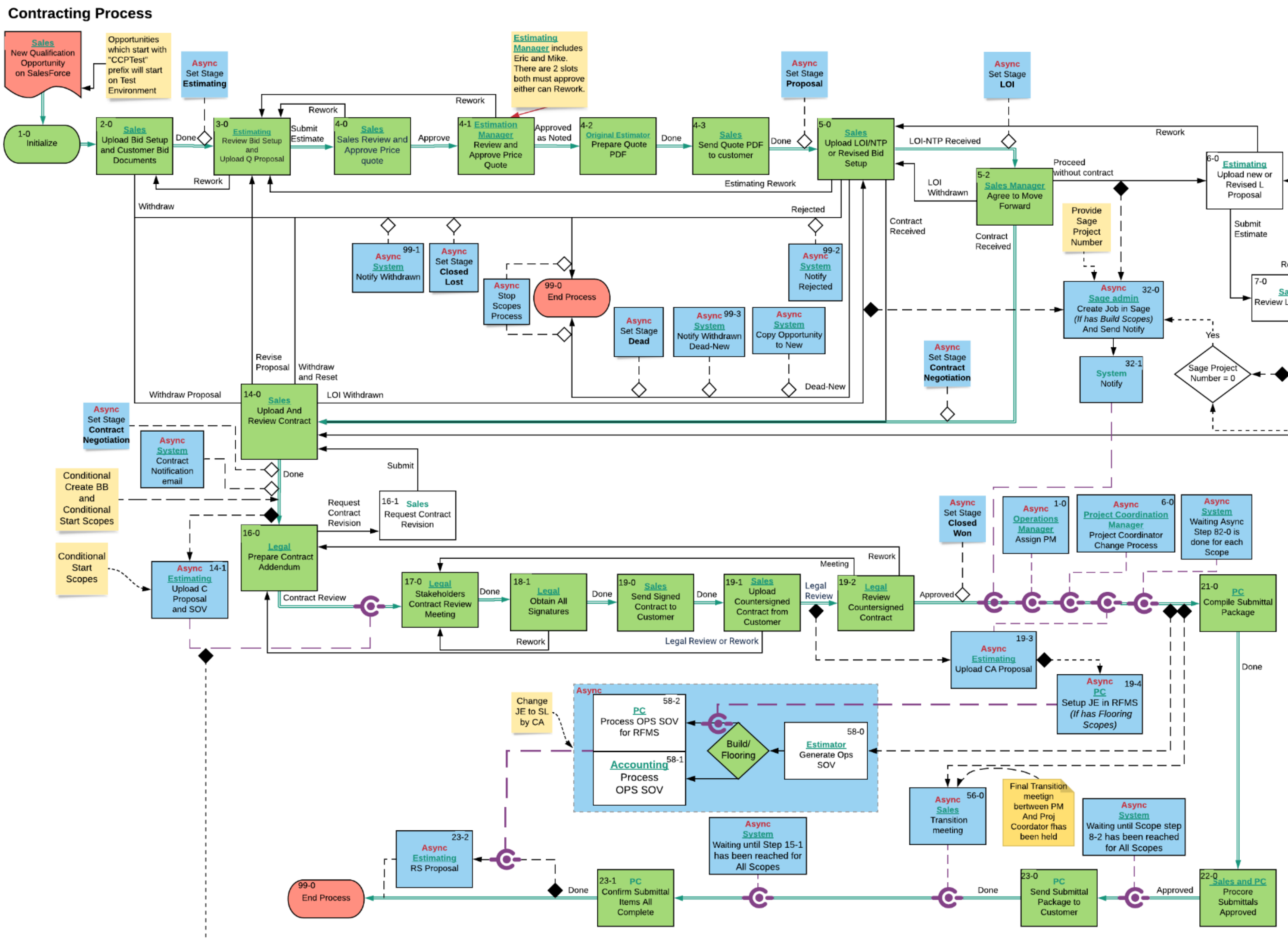
1. Update the job cost with values from OPS SOV and finalize "Original Budget" in Sage.
2. Set Action to "**Done**" and click Submit.



Screenshot - Lucid Chart – 58-1 Process OPS SOV – Contracting Process

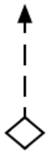
If after Step "58-0 Upload OPS Proposal " the asynchronous step "58-1 Process OPS SOV " is not yet closed, the process will be blocked and will not be able to get to "23-2 RS Proposal ".

Contracting Process General Schema

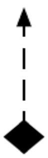


Designations on the diagram

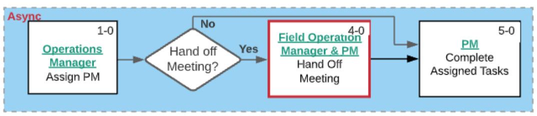
The project will not proceed to the next step, until the asynchronous step is closed.



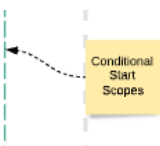
Indicates the transition of the project to the next stage.



Means that after the step, an asynchronous step will be launched, which will block the further progress of the project.

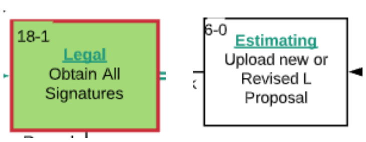


Asynchronous steps section

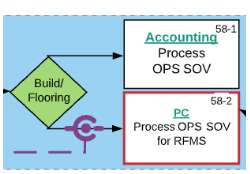


Note

Shows the asynchronous step of the main process, where the recipient's role and step name are spelled out

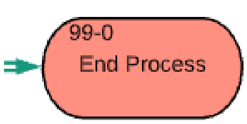


Shows the step of the main process, where the role of the recipient and the name of the step are registered. The red frame shows which step you are in.



Decision under which the task can follow one of the paths.

Start Process



End Process