



Contracting Process

CCP USER GUIDE

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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.

The screenshot shows the CCP Workflow application interface. On the left is a vertical navigation menu with sections: CCP WORKFLOW (My Worklist, My Opportunities, My Projects, Installer Scorecard, Template Repository), CCP DASHBOARDS (CCP1, CCP2), and HELPDESK (New Request). The main content area is titled "My Worklist". It displays a list of tasks with columns: LINK, FOLIO, and Task Form. Each task form row contains a blue arrow pointing to the "LINK" column. A callout box points to this arrow with the text: "At the My Worklist tab, find the required task and click on Task Form LINK to open the form." Above the main content area, a blue box says "Allocated User is displayed here." To the right of the main content area is a toolbar with buttons: Delegate, Redirect, Release, Refresh, and ViewFlow. A large callout bubble on the right side contains the following list of instructions:

- 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.

Each tab is named as one of the Opportunity status stages and shows existing tasks, which have the status as on the tab name.

To see the corresponding Task information, the user must select the Task line.

- To see the Opportunity Details, click on the "View" button.
- To view the Async Tasks for the current project, click the "View Async Tasks" button.
- The "Kill" button will offer to transfer the project to the Close-Lost or Dead-New status in the window that opens.
- You can also view the entire task list *Export to Excel*, by clicking the corresponding button.
- To refresh the list of tasks, click the "Refresh" button.
- When you click on the required task, the *View Flow* button appears, and the user can see the workflow of the task.

When the user clicks on the Task row, at the bottom of the page there appears a view with Attachments that have been added to the selected task. The Toolbar contains buttons for:

- "Refresh" the list of uploaded documents.
- "Add" a new document to Attachments.
- button for "Download" the required document.

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

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.

After closing one of the asynchronous tasks, you can click the Refresh button to refresh the page of both the pop-up window and the main one. You can then see the name of the next blocking step.

The screenshot shows the CCP Workflow interface. On the left, there's a sidebar with links like My Worklist, My Opportunities, My Projects, Template Repository, CCP Dashboards (selected), CCP1, CCP2, and Helpdesk. The main area has a title bar "Async Tasks" with a "Refresh" button. Below it is a table with columns: TYPE, ACTIVITY, RECIPIENT, STARTED ON, SHOULD END ON, STATUS, CREATED, and UPDATED. There are four rows of data. A callout box highlights the "ACTIVITY" column for the second row, which contains "1-0 Start PM Change Process". Another callout box highlights the "ACTIVITY" column for the third row, which contains "6-0 Start Project Coordinator Change Process". A modal window titled "Contract Negotiation" is open over the main table. It has tabs "All" and "Contract Negotiation" (selected). It includes buttons for "View" and "View Async Tasks (4)". The modal also has "Create Job in Sage" and "32-0 Create Job in Sage" buttons, along with "K2Test5" and "Contractor" fields. A tooltip "Waiting after step 19-2 for 'Create Job in Sage' Async Task" points to the "32-0 Create Job in Sage" button. The modal has a footer with "1 Won" and navigation arrows.

Blocking Async Tasks are highlighted in red. If several Async Tasks are selected in this way, priority will be indicated in the Activity of the main Task.

Screenshot - CCP Workflow – Button View Async Tasks

Upload file in the Attachment list

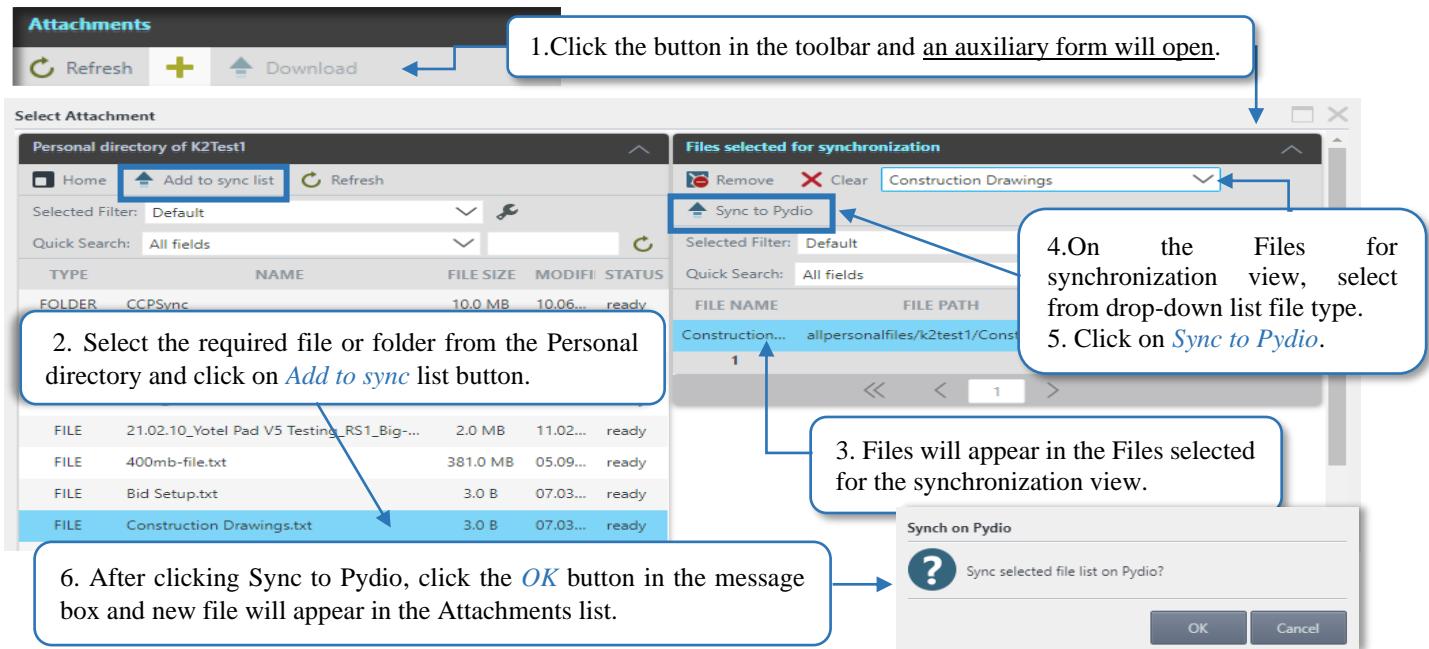
When adding a file using this method, an additional window opens.

To 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). Files in a personal folder can have two statuses: "Loading" and "Ready". With the first status, file synchronization is impossible. You must wait for the "Ready" status. 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 upload the file as an attachment, select the Type of Document (*Select an item*) from the dropdown list and click the *Sync to Pydio* button.

The screenshot shows a "Sync to Pydio" dialog box. At the top, there's a toolbar with "Home", "Add to sync list", "Refresh", and a "Sync to Pydio" button. Below the toolbar is a "Selected Filter: Default" dropdown and a "Quick Search: All fields" input field. The main area is titled "Files selected for synchronization" and contains a table with columns: FILE NAME, FILE PATH, FILE SIZE, and DATE ADDED. The table displays the message "No items to display.". Arrows point from the text "To quickly find the file you need, you can use the filter command." to the "Selected Filter" dropdown and the "Quick Search" input field.

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.

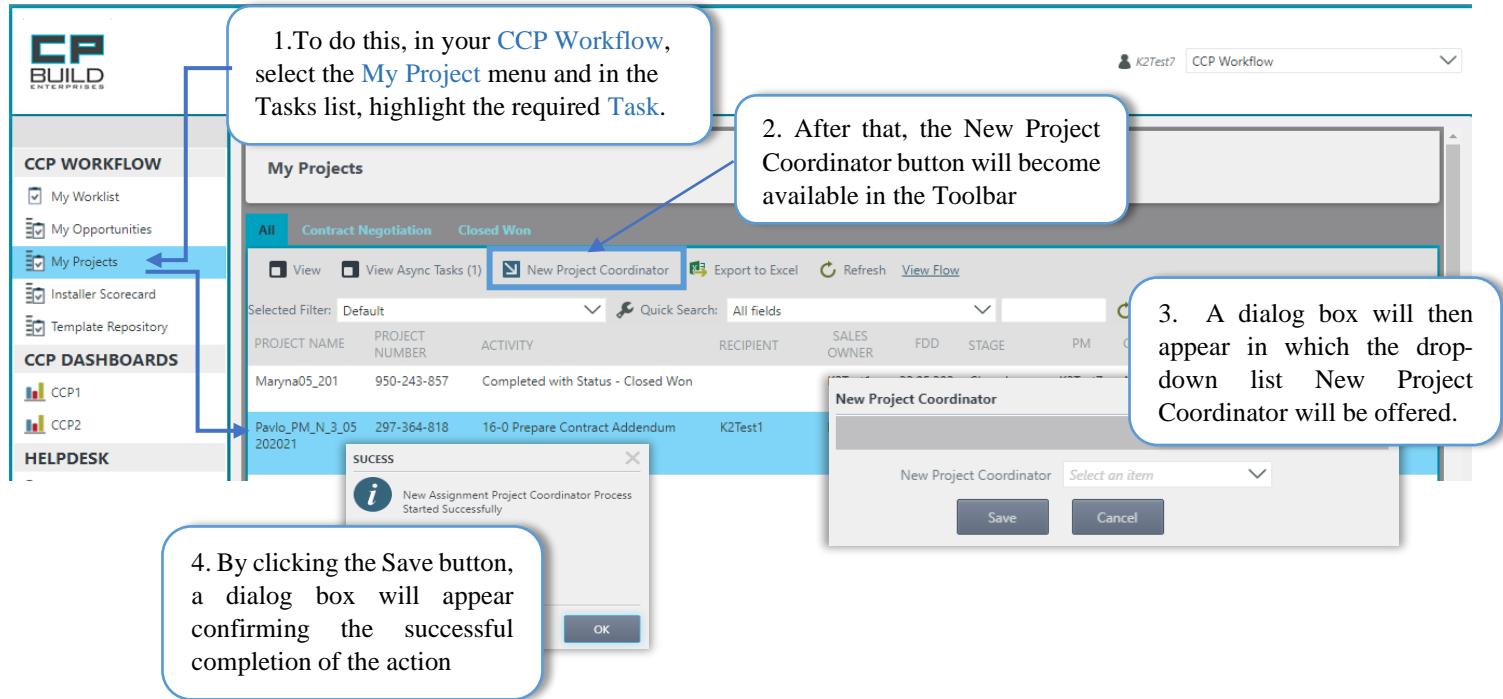
The screenshot shows the 'My Projects' interface with three tabs: All, Contract Negotiation, and Closed Won. A callout box points to the filter command line in the 'All' tab, with the text: 'To quickly find the file you need, you can use the filter command line'. Another callout box points to a task row in the 'All' tab, with the text: 'When the user Selects on the Task row appeared Project Scopes view, where user can see Scopes.' A third callout box points to a scope row in the 'Project Scopes' view, with the text: 'After user clicks on the Scope task row, there appears Project Scopes Phases view, where user can see the Phases.' A fourth callout box points to a phase row in the 'Project Scopes Phases' view, with the text: 'When user clicks on the Phases task row, there appears Scopes Phases Shipments view, where user can see the Shipments.' A fifth callout box points to the 'View Flow' button in the 'Task Details' view, with the text: 'To see the corresponding Task information, the user must select the Task line - To see the Project Details, click on the "View" button. - To view the Async Tasks for the current project, click on the "View Async Tasks" button. - You can also view the entire task list Export to Excel, by clicking the corresponding button. - To refresh the list of tasks, click the "Refresh" button. - When you click on the required task, the View Flow button appears, and the user can see the workflow of the task.'

Screenshot - CCP Workflow – My Projects

Additional role features

New Project Coordinator

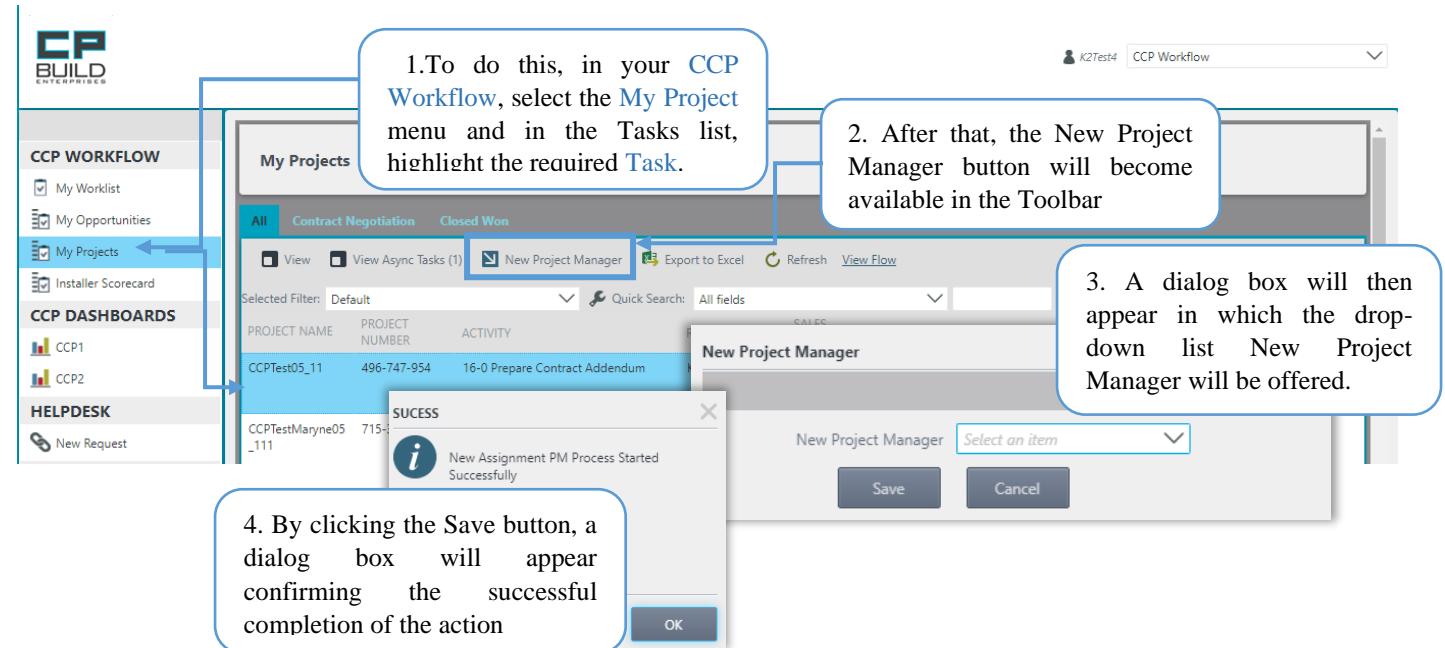
The Project Coordinator Manager can initiate the New Project Coordinator assignment process using the New Project Coordinator button on the My Project menu.



Screenshot - CCP Workflow – My Projects- New Project Coordinator

New Project Manager

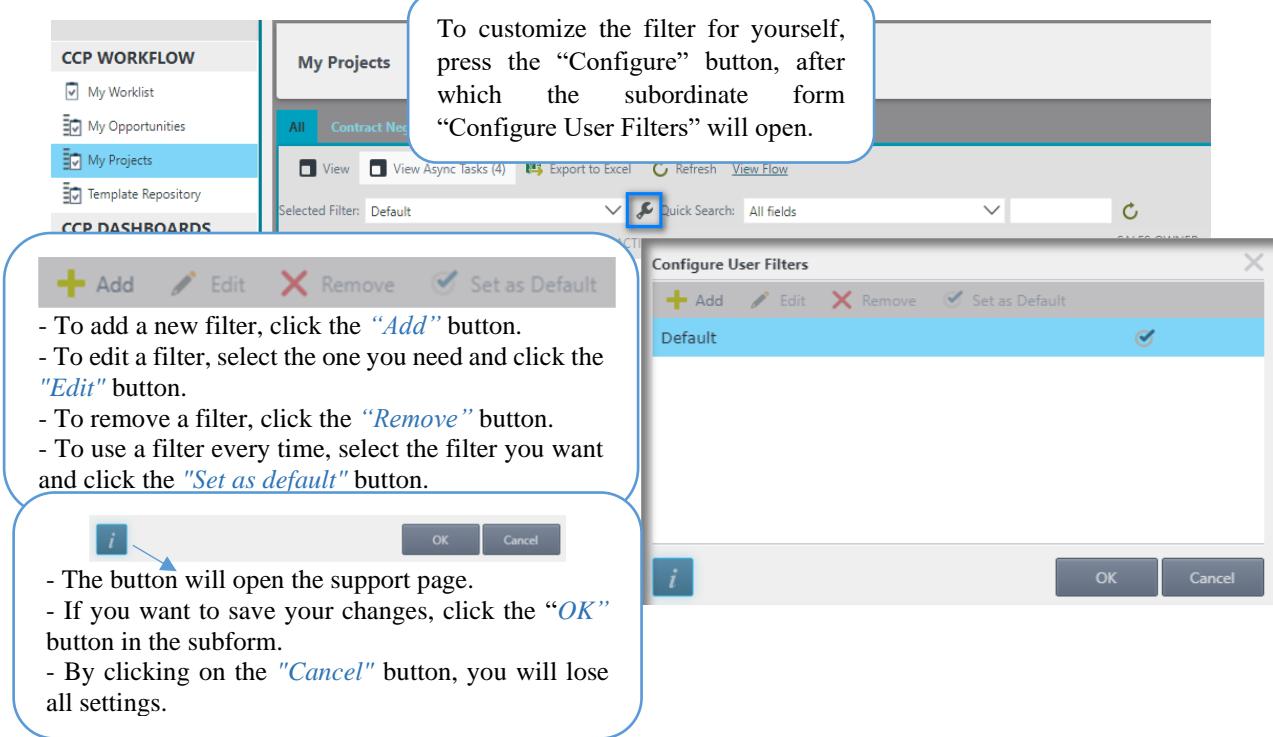
The Operations Manager can initiate the New Project Manager assignment process using the New Project Manager button on the My Project menu.



Screenshot - CCP Workflow – My Projects- New Project Manager

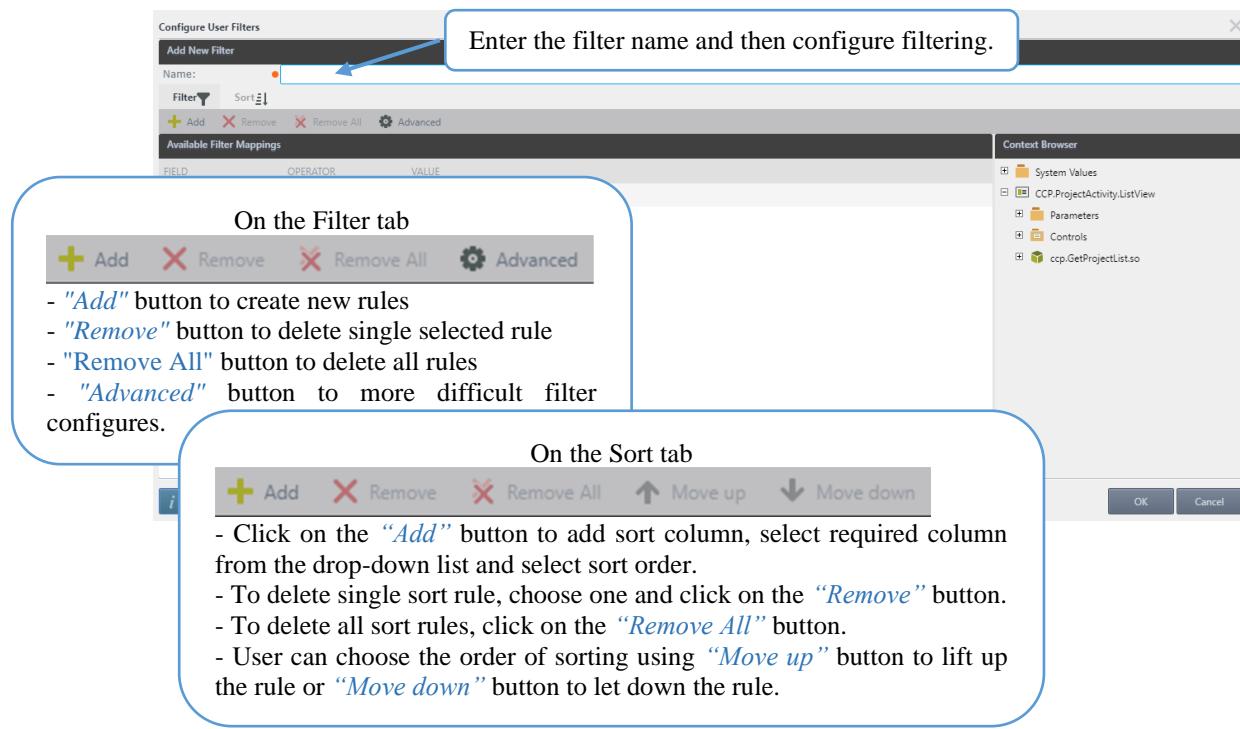
Filtering

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.

CCP Workflow / ContractingProcess / Opportunity
OPN-000001583: Test CCP - Test Company

2-0 Upload Bid Setup and Customer Bid Documents Step

Opportunity Q/A List

Opportunity Number:	OPN-000001583	CRM System Reference:	0063C00000C6mXQAJ
Customer Name:	Test Company	First Delivery Date:	02.03.2021
Contact:		Sales Owner:	K2Test1
Opportunity Name:	Test CCP	Build GM %:	45.00
Opportunity Description:	TestDescription	Flooring GM %:	25.00
Project Type:	Student Housing	Build Total:	\$50,000.00
Opportunity Stage:	Estimating	Flooring Total:	\$200,000.00
Pam Score:	74,00	Total Amount:	\$0.00

Bid Setup: *

Select Upload

Construction Drawings: *

Select

Project Scopes

Refresh

SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED E	STATUS
CAB	Cabinets	24	581,85	01.03.2021	07.03.2021	07.03.2...	K2-SMA...	Added
FLRB	Flooring - Base	28,25	144 033...	01.03.2021	07.03.2021	07.03.2...	K2-SMA...	Added
TOPI	Countertops	28,25	144 033...	01.03.2021	07.03.2021	07.03.2...	K2-SMA...	Added

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

Please fill in the mandatory field «Pam Score». Select and Upload Bid Setup and Construction Drawings files, if you select wrong document click Cancel and try again. Set Action to "Done" or "Withdraw", and Click Submit. Done changes the Stage to "Estimating". Withdraw changes the Stage to "Closed-Lost". Note that the "Withdraw" Action requires a comment.

Comment:
Type a value

Task Action: Select an item Submit Close

Attachments

Refresh + Download

Selected Filter: Default Quick Search: All Fields

TYPE	FILE NAME	META DATA TAG	FILE SIZE	UPDATED BY	UPDATED DATE
Price Quote	Q_file.xlsx		2.84 MB	K2:SMARTK2(K2Test3	07.03.2021
Bid Setup	Bid Setup.txt		3.0 B	K2:SMARTK2(K2Test1	07.03.2021
Construction Drawings	Construction Drawings.txt		3.0 B	K2:SMARTK2(K2Test1	07.03.2021
Bid Setup	letter.txt		96.0 KB	K2:SMARTK2(K2Test1	28.02.2021

Action History

STEP	COMMENT	ACTION	DISPLAY NAME	CREATE DATE	TIME
3-0 Review Bid Setup and Upload Q Proposal	1	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	Активация Windows	27.02.2021	13:31:12

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.

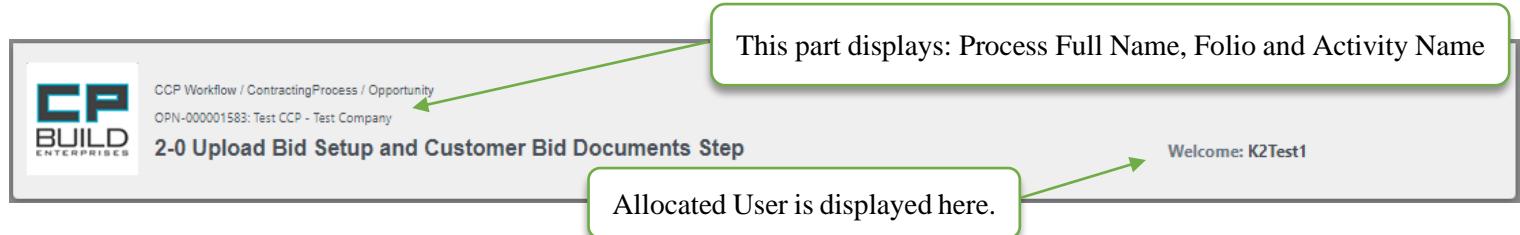
On the Attachment view you may see added attachments, download them, or add a new one.

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.

Opportunity Q/A List Opportunity Number: OPN-000001583 Customer Name: * Test Company Contact: Test CCP Opportunity Name: * Test CCP Opportunity Description: TestDescription Project Type: Student Housing Opportunity Stage: * Estimating Pam Score: * 74.00 Sales Owner: * K2Test1 Build GM %: 45.00 Flooring GM %: 25.00 Build Total: \$50,000.00 Flooring Total: \$200,000.00 Total Amount: \$0.00

Bid Setup: * Select Upload Construction Drawings: * Select

Tabbed area to work with. Highlighted the currently active tab Opportunity.

Here you can upload files from a personal folder on Pydio. This part, * also means the obligatory Upload of this type of documents.

This block displays information about the current process. Fields that must be filled in before proceeding to the next step will be marked. *

Screenshot – Opportunity tab – Contracting Process

To add attachments:

Bid Setup: * Select Upload

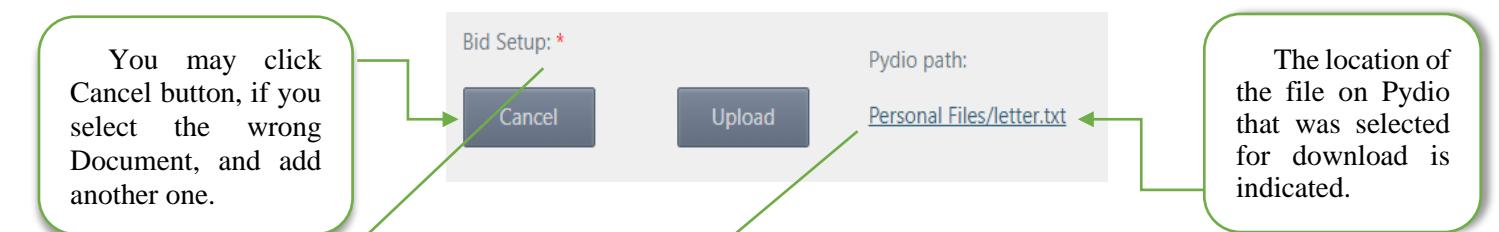
1. Click on the Select button and the view will open.

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

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

CCP.Pydio.UserFolder.ListView					
	TYPE	NAME	FILE SIZE	MODIFIED	STATUS
	FOLDER	CCPSync	10.0 MB	10.06.2020	ready
	FOLDER	Upload	2.0 MB	11.06.2020	ready
	FILE	400mb-file.txt	381.0 MB	05.09.2020	ready

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”.



Attachments					
	FILE NAME	META DATA TAG	FILE SIZE	UPDATED BY	UPDATED DATE
Bid Setup	letter.txt		96.0 KB	K2:SMARTK2\K2Test1	28.02.2021

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.

Project Scopes										
SCOPE CODE	SCOPE TYPE	CONSOLIDATED I	SP GM	SCOPE TI	FDD	CREATED	UPDATED	UPDATED	STATUS	
FLRB	Flooring - Base	FLRD	47,60	12...				K2:SMA...	Finish...	
LVTD	Flooring - LVT	FLRD	27,12					K2:SMA...	Finish...	
VCT	Flooring - VCT	FLRD	45,16					K2:SMA...	Finish...	
SKSU	Sinks Units	TOPSKSIU	53,17					K2:SMA...	Finish...	
TOPIU	Countertops Units	TOPSKSIU	47,10					K2:SMA...	Finish...	
TLS	Toilets		91,95					K2:SMA...	Initiat...	
SKSC	Sinks Commons		53,17	43 53...	10.07.2021	08.06.2021	08.06.2...	K2:SMA...	Started	
FLRD	Flooring - Domestic Consolidated		26,37	690 7...	10.07.2021	08.06.2021	08.06.2...	K2:SMA...	Started	

The Consolidated In column shows the Consolidated Scope Code, to which a particular Scope belongs.

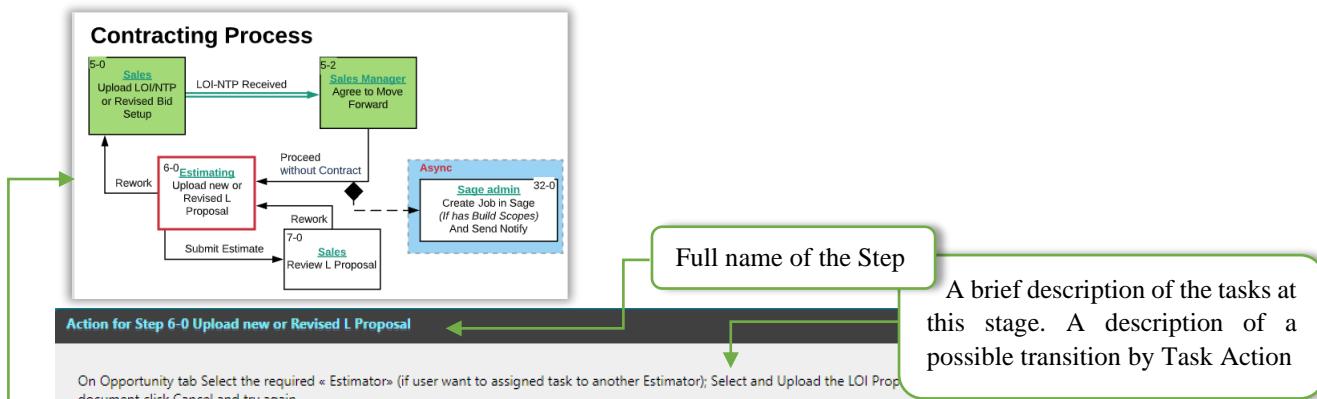
Column Status:

- "Added" Scope added, but not started yet.
- "Initiated" Scope is ready to start.
- "Started" Scope has started but has not finished yet.
- "Finish" Scope process is completed as soon as it passes or finished forcibly.

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.

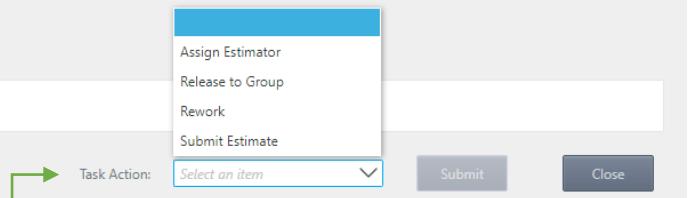
Action for Step

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.



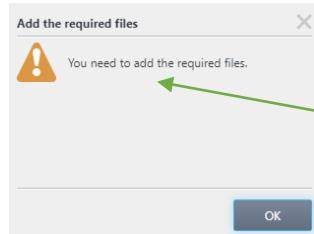
Comment:
Type a value

Area for entering comments, especially when the action in a step is performed Rework - a comment is required. If you want a specific user to see this comment, you need to specify the username after the @ (Example: @NameUser). This message will be shown in SalesForce chat.



To move the current step further, select "Task Action" from the drop-down list. After selecting "Action", click the "Submit" button. Or "Close" to close the current window.

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.



For example: You need to add the required files.
Click OK and download the required files. Then repeat the Action to go to the next Step.

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.

The screenshot shows a table of attachments with columns: TYPE, FILE NAME, META DATA TAG, FILE SIZE, UPDATED BY, and UPDATED DATE. One row is selected, showing 'Bid Setup' as the type, 'letter.txt' as the file name, 'Personal Files/letter.txt' as the Pydio path, '96.0 KB' as the file size, 'K2:SMARTK2\K2Test1' as the updated by user, and '28.02.2021' as the updated date. Above the table, a modal dialog box is open with fields for 'Bid Setup:' (containing 'letter.txt'), 'Cancel', 'Upload', and 'Pydio path:' (containing 'Personal Files/letter.txt'). A green arrow points from the 'Bid Setup' button in the toolbar to the 'Bid Setup:' field in the modal.

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.

The screenshot shows a table of attachments with columns: TYPE, FILE NAME, META DATA TAG, FILE SIZE, UPDATED BY, and UPDATED DATE. The table lists four files: 'Price Quote' (Q_file.xlsx), 'Bid Setup' (Bid Setup.txt), 'Construction Drawings' (Construction Drawings.txt), and 'Bid Setup' (letter.txt). Above the table is a toolbar with buttons for 'Refresh', 'Add', and 'Download'. A green arrow points from the 'Refresh' button to the 'Refresh' button in the toolbar. Another green arrow points from the 'Selected Filter' dropdown to the 'Quick Search' field. Callouts provide descriptions for these elements: the toolbar buttons help refresh the list, add new documents, and download existing ones; the filter command line allows users to quickly find specific files.

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.

The screenshot shows the 'Action History' section. At the top, there is a message box titled 'Action for Step 2-0 Upload Bid Setup and Customer Bid Documents'. It contains a 'Comment:' field with placeholder text 'Type a value', a 'Task Action:' dropdown menu with options 'Done' and 'Withdraw', and a note about the 'Withdraw' action requiring a comment. Below this is a table titled 'Action History' with columns: STEP, COMMENT, ACTION, DISPLAY NAME, CREATE DATE, and TIME. The table contains three rows:

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	Активация Windows Чтобы активировать...	27.02.2021	13:31:12 В

A callout box on the right side of the screenshot provides a detailed description of the 'Action History' feature:

It shows a list of completed steps with their names, what comment was entered at the corresponding steps, what Action was selected for each Step, which user performed the action and on what day and time it was performed.

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.

The screenshot shows the CCP Workflow interface for the '4-1 Review and Approve Price Quote Step'. The 'Attachment Include/Exclude' tab is selected. The page displays a list of quotation files, specification items, scope items, and special notes. A callout box highlights the 'Header' section, which displays current information about process name, project name and step number with its name and username. Another callout box highlights the 'Attachment view' section, showing quotation files and download options. A third callout box highlights the 'Include \ Exclude tab' section, showing specification items and scope items. A fourth callout box highlights the 'Special Notes' section at the bottom.

FILE NAME	FILE SIZE	UPDATED BY	UPDATED DATE
1902_5.xlsx	2.84 MB	K2SMARTK2/K2Test3	13.03.2021
1902_6.xlsx	2.84 MB	K2SMARTK2/K2Test3	13.03.2021

SPECIFICATION ITEMS	INCLUD	NOTES	SCOPE ITEMS	INCLUD	NOTES
Particle Board Box (Standard)	X		Blind Base Corner Cabinet		
Plywood Box (Upgrade)			Blind Upper Corner Cabinet		
Butt Joint Drawer Connections (Standard)	X		Linen Closets		
Dovetail Joint Drawer Connections (Upgrade)			Pantry Cabinets		
Ball-Bearing Drawer Glides, Side-Mounted (Standard)	X		Modular Closets		
Nylon Roller Drawer Glides (VE)			Refrigerator End Panels		State if Only at Exposed End or Complete Surround (Top ...
Soft-Close Drawer Glides, Side-Mounted (Upgrade)			Island and/or Peninsula Back Panel		
Soft-Close Drawer Glides, Undermounted (Premium Upgr.			Floating Shelves/Fixed Shelves		
Adjustable Door Hinge (Standard)	X		Undercabinet Light Valance		
Soft-Close Adjustable Door Hinge (Upgrade)			Crown Moulding		
Particle Board Drawer Body (Standard)	X		Base Shoe Moulding		
Metal Drawer Body (Upgrade)			Soffit Panels or Covers		
Solid Wood Drawer Body (Premium Upgrade)		Typically Only for Wood Cabs; Dovetail Joints are Part of T...	Pony Wall Skin Cover or Panel		
3/4 Depth Cabinet Shelves (Standard)	X		Flip-Up Upper Cabinet Doors		
Full-Depth Cabinet Shelves (Upgrade)			Oven Pipe Cover		
Rollout Shelves (Premium Upgrade)			Radius Shelves		
Matte Finish (Standard)	X		1/4 Turn Shelves		
Textured Finish (Standard, In Most Cases)			Scribe to Floor		
High Gloss Finish (Upgrade)			Scribe to Ceiling/Soffit		
Acrylic (PET) High Gloss Finish (Premium Upgrade)			Lazy Susan		
12" Deep Upper Cabinets (Standard)	X		Trash/Recycling Pull-Out		Trash Can Excluded
24" Deep Refrigerator Cabinet (Upgrade)			Breadboards		Rubberwood Material typ.
36" Upper Cabinet Height (Standard)	X		Medicine Cabinets		Same Finishes as Cabinetry Not an Accessory with a Mirror
30" Upper Cabinet Height (VE)			Glass Door Inserts		Specify if it is Clear or Opaque (Premium)
42" Upper Cabinet Height (Upgrade)			Wire Rack (Lattice)		
48" or Taller Upper Cabinet Height (Premium Upgrade)			Pull-Out Spice Rack		
Hardware - Longer Pulls at Doors, Shorter at Drawers (Sta... X			Tip Trays (2 Per Sink; Plastic)		
Short Pulls Throughout (VE)			Locks		
Longer Pulls or Premium Finishes (Upgrade)			Corbels (For Countertops)		Typ. Provided By Countertop Provider
			Concealed Countertop Supports		Typ. Provided By Countertop Provider

SPECIAL NOTES

Note that the Details Above are for the Base Bid Only. Any VE, ADD, or Upgrade Options Listed on the Proposal are NOT Detailed Above

Note that the Details Above are for the Residential Units Only. Inclusion/Exclusion Details for the Common Areas are Listed in the Proposal. NOT Detailed Above

All In-Wall Support Brackets are Excluded

All Blocking are Excluded

Plywood Box at Sink Base Locations (Standard)

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

To compare files:

The screenshot shows the CCP Workflow interface for the '3-0 Review Bid Setup and Upload Q Proposal Step'. The 'Attachment Include/Exclude' tab is selected. The page displays a list of specification items, scope items, and special notes. A callout box highlights the 'Expand the Attachment Include / Exclude' button.

SPECIFICATION ITEMS	INCLUD	NOTES	SCOPE ITEMS	INCLUD	NOTES
No items to display.			No items to display.		

SPECIAL NOTES

No items to display.

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.

1. Select the Price Quote file you interested in and click on Compare Quote File button.

2. Sub form, where you can see the difference will open. If there is no difference with the Quote file, you will see the notification.

TYPE	FILE NAME	FILE SIZE	UPDATED BY	UPDATED DATE
Price Quote	1902_5.xlsx	2.84 MB	K2:SMARTK2\K2Test3	13.03.2021
Price Quote	1902_6.xlsx	2.84 MB	K2:SMARTK2\K2Test3	13.03.2021

ITEMS	SCOPE ITEMS	INCLUD	NOTES																																						
COP.ChangedInIncludeExclude.Form																																									
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No items to display.																																									

*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.

The screenshot shows the CCP Workflow interface for the Contracting Process. The top navigation bar includes the CP BUILD ENTERPRISES logo, the path CCP Workflow / ContractingProcess / Opportunity, the ID OPN-000001583: Test CCP - Test Company, and the user Welcome: K2Test1. The main content area is titled "2-0 Upload Bid Setup and Customer Bid Documents Step". Below this, there are two tabs: "Opportunity" and "Q/A List", with "Q/A List" being active. The "Q/A List" section has a toolbar with "Add", "Delete", "Redirect", and "Refresh" buttons. It displays columns for "CREATED USER", "QUESTION", "DESTINATION USER", "ANSWER", and "UPDATED". A message "No items to display." is shown. The "Attachments Q/A" section below it also has a toolbar with "Refresh" and "Download" buttons. It includes a "Selected Filter: Default" dropdown, a "Quick Search: All fields" search bar, and columns for "TYPE", "FILE NAME", "META DATA TAG", "FILE SIZE", "UPDATED BY", and "UPDATED DATE". A message "No items to display." is also present here. Navigation controls like arrows and a page number indicator (1) are at the bottom.

In the Q/A List area, the entire correspondence history is available for viewing and working.

On the Attachments Q/A view, you may see added attachments and can download them.

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.

The screenshot shows the Q/A List section of the CCP Workflow interface. The toolbar includes "Add", "Delete", "Redirect", and "Refresh" buttons. The main table displays columns for "CREATED USER", "QUESTION", "DESTINATION USER", "ANSWER", and "UPDATED". A callout bubble points to the toolbar with the text: "The toolbar contains buttons responsible for creating a new list of questions and answers, Click the "Add" button; deleting the correspondence with the "Delete" button; redirect to another target user with the "Redirect" button and Refresh windows button "Refresh".". Another callout bubble points to the table with the text: "This part will contain closed correspondence and awaiting answers. The list displays Created User, Question, Destination user, Answer and Updated.".

To add new Q/A List:



1. Click on the *Add* button to create a new question.

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 it in 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.

A screenshot of the Project Q/A sub-form interface. The window title is 'Project Q/A'. The toolbar contains buttons for editing text (highlighted with a green arrow). The main area has a text editor with a toolbar above it. A placeholder text 'Welcome: K2test1' is visible. A text input field 'Destination User' is shown with a dropdown menu open. The 'Attachments' section is visible below, showing a table with columns: TYPE, FILE NAME, META DATA TAG, FILE SIZE, UPDATED BY, and UPDATED DATE. At the bottom are 'Design' and 'HTML' buttons, and 'Submit' and 'Cancel' buttons.

The toolbar contains buttons for editing text.

Select Destination User to whom the letter is addressed.

The text of the letter will be placed here.

In the Project Q / A area, there is a field for the text of the letter. It is possible to edit it and select a Destination User.

It is possible to unseal the text of the letter.

The control buttons of the letter *Close* or *Submit* are located.

In the Attachments view, you can see the attachments added to the letter, download them, or add new ones. This area works identically to the Tab Opportunity.

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.

CCP Workflow / ContractingProcess / Project
OPN-000001583: Test CCP - Test Company
14-0 Upload And Review Contract Step

Welcome: K2Test1

Project Include/Exclude Q/A List Approval Notes Contract Review Contract Information

Q/A List

+ Add X Delete Redirect Refresh

CREATED USER: K2Test1 DESTINATION USER: K2Test3 ANSWER: Question for Test 2 UPDATED: 12.03.2021

Attachments Q/A

Refresh Download Selected Filter: Default Quick Search

FILE NAME: 1902_4.xlsx META DATA TAG: FILE SIZE: 2.0 MB UPDATED BY: K2SMARTK2/K2Test1 UPDATED DATE: 12.03.2021

Question * B I U "Scope UI" 12px Question for Test 2 Design HTML

Destination User: K2Test1

Attachments Refresh Download Selected Filter: Default Quick Search All fields FILE NAME: 1902_4.xlsx META DATA TAG: FILE SIZE: 2.0 MB UPDATED BY: K2SMARTK2/K2Test1 UPDATED DATE: 12.03.2021

OK Cancel

3. A confirmation message will then be displayed.

2. The text of the previous letter and attached files will be saved in the window that opens. The user needs to delete the previous target user and select the desired one. After that, click Submit at the bottom.

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.

CCP Workflow / ContractingProcess / Opportunity
OPN-000001583: Test CCP - Test Company
4-0 Sales Review and Approve PriceQuote Step

Welcome: K2Test1

Opportunity Include/Exclude Q/A List Approval Notes

Attachment List

Refresh Download Selected Filter: Default Quick Search: All fields

TYPE	FILE NAME	META DATA TAG	FILE SIZE	UPDATED BY	UPDATED DATE
Price Quote	1902_5.xlsx		2.04 MB	K2SMARTK2/K2Test3	13.03.2021
Price Quote	1902_6.xlsx		2.04 MB	K2SMARTK2/K2Test3	13.03.2021

Approval Notes

+ Add Edit X Delete Save Refresh

NOTE NUMBER	STEP NUMBER	SCOPE	NOTE	COMPLETED	USER	DATE
No items to display.						

On the Attachment List view, you may see added attachments and you can download them.

In the "Approval Notes" area, you can add Notes to each Scope.

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

Approval Notes

+ Add Edit X Delete Save Refresh

NOTE NUMBER	STEP NUMBER	SCOPE	NOTE	COMPLETED	USER	DATE
4-0	Select an item		Type a value		K2Test1	13.03.2021

At this stage, you can change two fields: select Scope from the dropdown list and enter Note for these Scope.

To add notes:

1. From the Attachments List, view select required Price Quotation file.

2. On the Approval Notes, click the Add button and a new row will appear

3. On the Note column, enter the note text

4. In the Scope column, select from drop-down list scope name that you need

5. Click the Save button.

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

NOTE NUMBER	STEP NUMBER	SCOPE	NOTE	COMPLETED	USER	DATE
1	4-0	Flooring - Base	Add Note Here	No	K2Test1	13.03.2021

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:

1. From the Attachments List, view select required Price Quote file

2. Select needed note on the Approval Notes

3. Click on the Complete button

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.

The screenshot shows the Sales - Step 14-0 Upload and Review Contract - Contracting Process interface. It includes the following sections:

- Header:** Displays process name (CCP Workflow / ContractingProcess), project name (OPN-000001597 TestCCPMaryna1303 - Test Company), and step number (14-0 Upload And Review Contract Step). A welcome message is also present.
- Project Information:** Fields for Bluebeam Studio Project Number, Customer Name, Contact, Project Name, and Project Description. It also shows First Delivery Date (20.03.2021), Project Type, Opportunity Stage (Contract Negotiation), Project Manager, and Project Coordinator. Financial details include Build GM %, Flooring GM %, Build Total (\$168,615.78), Flooring Total (\$796,362.40), and Total Amount (\$874,978.18).
- Quotation Files:** Sections for PAM2 Spreadsheet and Contract, each with Select and Upload buttons.
- Action Step:** A table titled "Action for Step 14-0 Upload And Review Contract" showing three rows: CAB (Cabinets), TOP1 (Countertops), and FLRB (Flooring - Base). Each row has columns for Scope Code, Scope Type, Scope GM, Scope Total Am, FDD, Created, Updated, Updated By, and Status.
- Comments:** A text input field for comments.
- Task Action:** A dropdown menu for selecting actions like "Select on item" or "Submit".
- Attachments:** A grid view showing attachments with columns: TYPE, FILE NAME, META DATA TAG, FILE SIZE, UPDATED BY, and UPDATED DATE. Examples include LOI Proposal PDF, LOI Proposal, NTP, Price Quote PDF, Price Quote, Bid Setup, and Construction Drawings.
- Action History:** A table showing a history of steps taken, including step name, comment, action, display name, create date, and time.

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.

In the Attachment view, you may see added attachments, download them, or add new ones.

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

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.

The screenshot shows the CCP Workflow Contracting Process interface. At the top, it says "Welcome: K2Test1". Below that is a navigation bar with tabs: Project, Include/Exclude, Q/A List, Approval Notes, **Contract Review**, and Contract Information. The "Contract Review" tab is active. On the left, there's a sidebar with various project details like Customer Name & Legal Name, Job Name, Bid / Take-off Estimator, etc. The main area has several input fields for financial and risk metrics. To the right, a large callout box states: "In this part of the Contract Review tab, we see the listed Checklist items for checking the contract." Below this, another callout box states: "In this part of the tab, we see the items of the checklist (group, items), and owner who specifies who should sign the above information in the 'Contract Verification Checklist'." At the bottom, there's a table titled "Checklist Items" with columns for Group, Item, Owner, Signature, and Date. The table lists various checklist items grouped by category (ESTIMATING, SALES, LEGAL, IMPORT, ACCOUNTING) with their respective owners and signature fields.

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:

The screenshot shows the same interface as before, but with a focus on the "Edit" button located at the bottom center of the main form area. A callout box points to this button with the instruction: "1. Click the button *Edit* and enter the details that you know in the right column." Another callout box points to the "Save" button on the right side of the detailed checklist table with the instruction: "2. After entering the information you know, click the button *Save*." The detailed checklist table on the right contains various fields for entering financial and risk-related data.

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.

CCP Workflow / ContractingProcess / Project
OPN-000001597: TestCCPMaryna1303 - Test Company
16-0 Prepare Contract Addendum Step
Welcome: K2Test6

Project Include/Exclude Q/A List Approval Notes **Contract Review**

Customer Name & Legal Name: Test Company

Sales Person: K2Test1

Contract Value: test 1
Final SOV Gross Margin %: 85
PAM 2 Score: 85
D&B Bad Debt Risk: test 2
D&B Cash Flow Risk: test 4
Deposit Amount: test 5
Retention: test 3
Overhead/Fees for COs: test 6
Sales validate Contract \$\$ = Bid (initials of reviewer): test 7
Estimating validate Contract \$\$ = Bid (initials of reviewer): test 8
Is this a prevailing wage job? Y/N: No
Is this Tax Exempt Y/N - If No, list Sales Tax Rate: Yes

Contract Review Checklist PDF: Legal Review Questionnaire.pdf (PDF File) Download

Save

After loading, the document will look like

CP|BUILD
ENTERPRISES

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: 1
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
Retention: 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 (If Flooring) - Flooring Review & Waste % Verified	K2Test4	_____	_____
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.

The screenshot shows the CCP Workflow / ContractingProcess / Project screen. At the top, it says '14-0 Upload And Review Contract Step' and 'Welcome: K2Test1'. Below this is a navigation bar with tabs: Project, Include/Exclude, Q/A List, Approval Notes, Contract Review, and Contract Information (which is highlighted). The main area has two sections: 'Project Information' and 'Legal Requests'. The 'Project Information' section contains fields for Project Name (TestCCPMaryna1303), Project Location, GC, Owner (K2SMARTK2/K2Test1), Scopes (Cabinets,Countertops,Flooring - Base), Total Amount (874 978.18 \$), Projected Start Date (13.03.2021), and # of Units. The 'Legal Requests' section contains several groups of questions with 'Yes' and 'No' radio buttons. A green callout box points to the 'Contract Information' tab with the text: 'In this part, the user can see of the Contract Information.' Another green callout box points to the 'Legal Requests' section with the text: '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: K2ServiceCPBuildDev3 <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,Flooring - Base,Countertops,Countertops Units
Total Amount – 65258775
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.

SCOPE CODE	SCOPE TYPE	CONSOLIDATED IN	SCOPE GM	SCOPE TOTAL	FDD	CREATED	UPDATED	UPDATED BY	STATUS
CABIU	Cabinets Units			37,27	866 845,60	01.06.2021	25.05.2021	K2-SMARTK2...	Finished
FLRB	Flooring - Base	FLRD	47,60	124 512,97	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Finished
LVTD	Flooring - LVT	FLRD	27,12	522 737,47	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Finished
SKSU	Sinks Units	TOPSKSIU	53,17	43 537,97	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Finished
SKSC	Sinks Commons			43 537,97	01.06.2021	25.05.2021	28.05.2021	K2-SMARTK2...	Added
TLS	Toilets		91,95	375 210,97	01.06.2021	25.05.2021	28.05.2021	K2-SMARTK2...	Added
TOPIU	Countertops Units	TOPSKSIU	47,10	23 537,97	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Finished
VCT	Flooring - VCT	FLRD	45,16	43 537,97	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Finished
FLRD	Flooring - Domestic Consolidated		26,37	690 788,40	01.06.2021	25.05.2021	26.05.2021	K2-SMARTK2...	Added
TOPSKSIU	Tops/Sinks - Import Consolidated		51,04	67 075,93	01.06.2021	25.05.2021	25.05.2021	K2-SMARTK2...	Added

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.

SCOPE COI	BALL IN COURT	SPEC SECTION	#	TITLE	STATUS	APPROVERS	RESPONSE	SENT DATE	RETURNED DATE	FINAL DUE DATE
	Resilient Flooring	Resilient Flooring -1.0	RU-01 - Fitness Room Rubber Tile Flooring	Closed	Madison Budetti Jacob Petersen Dan Furniss Dan Furniss Spencer Olson	Approved Approved Submitted Approved Approved	12/09/2019 11/15/2019 12/09/2019 01/22/2020 01/23/2020 04/05/2020	12/09/2019 12/10/2019 01/22/2020 01/23/2020 04/05/2020		02/07/2020
	Resilient Flooring	Resilient Flooring -2.0	NOT APPROVED TL-01 - Units Kitchen and Bath LVT	Closed	Madison Budetti Jacob Petersen	Approved Approved	04/06/2020 12/05/2019	04/06/2020 04/07/2020		12/27/2019

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.

At this step, we have two tabs available for work:

- Opportunity
- Q/A List

In the Opportunities tab, there are required objects to be filled in.

The Q/A List tab is filled in. If there is any question.

Please fill in the mandatory field «Pam Score».

Please Select and Upload the mandatory Files, such as for the Bid Setup and Construction Drawings

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.

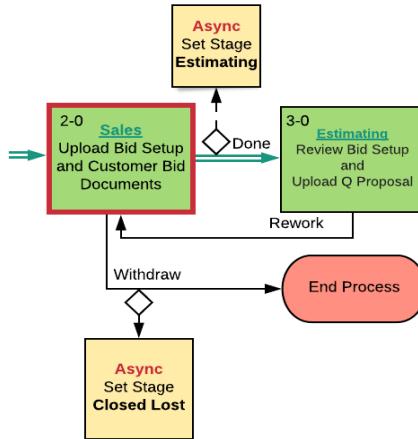
*The User can find a step-by-step description of uploading a file in the description of the Opportunity tab.

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".

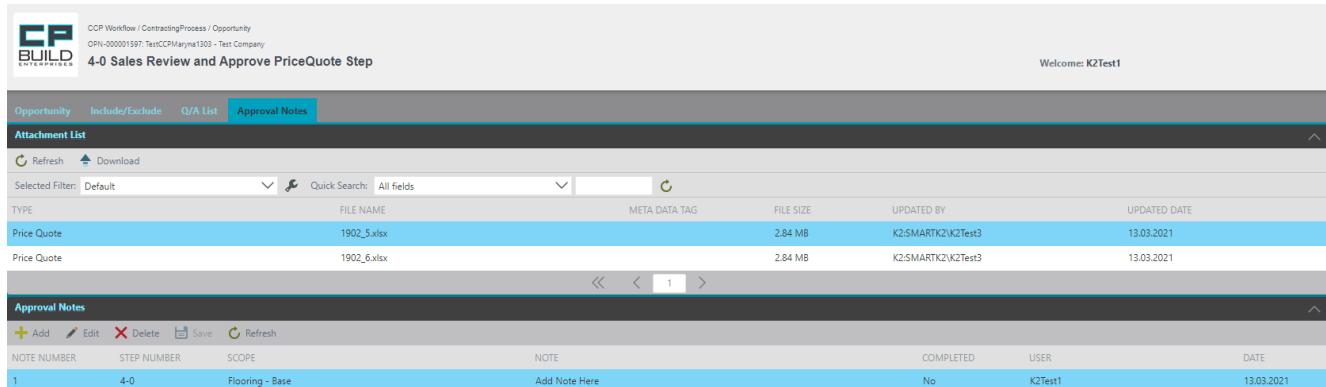
*Note: that the "Withdraw" Action requires a comment.



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.



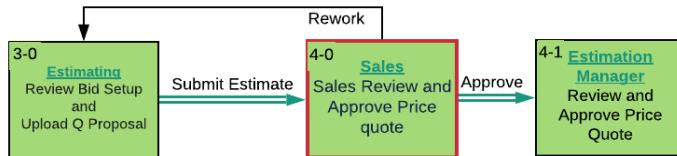
Screenshot - Sales – Step 4-0 Sales Review and Approve Price Quotation – Contracting Process

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.

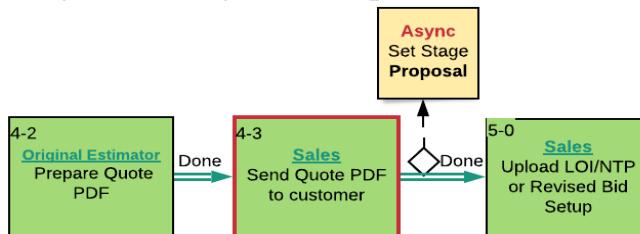
Attachments				
Type	File Name			Updated Date
Price Quote PDF	PriceQuote PDF.txt			15.03.2021
Price Quote	1902_5.xlsx	2.84 MB	K2:SMARTK2\K2Test3	15.03.2021
Price Quote	1902_6.xlsx	2.84 MB	K2:SMARTK2\K2Test3	13.03.2021
Bid Setup	Bid Setup.txt	3.0 B	K2:SMARTK2\K2Test1	13.03.2021
Construction Drawings	Construction Drawings.txt	3.0 B	K2:SMARTK2\K2Test1	13.03.2021

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.

The screenshot shows the CCP Workflow interface for the Contracting Process. The current step is "5-0 Upload LOI-NTP or Revised Bid Setup Step". The main form includes fields for Opportunity Number (OPN-000001597), Customer Name (Test Company), Contact (TestCCPMaryna1303), Opportunity Stage (Proposal), and various financial metrics like Build Total (\$168,615.78) and Total Amount (\$874,978.18). At the bottom left, there is a section for "Estimating" with "LOI/NTP" and "Select" and "Upload" buttons. A green callout box with a curved arrow points from the text "Select and upload LOI / NTP or Revised Bid Setup file" to the "Upload" button.

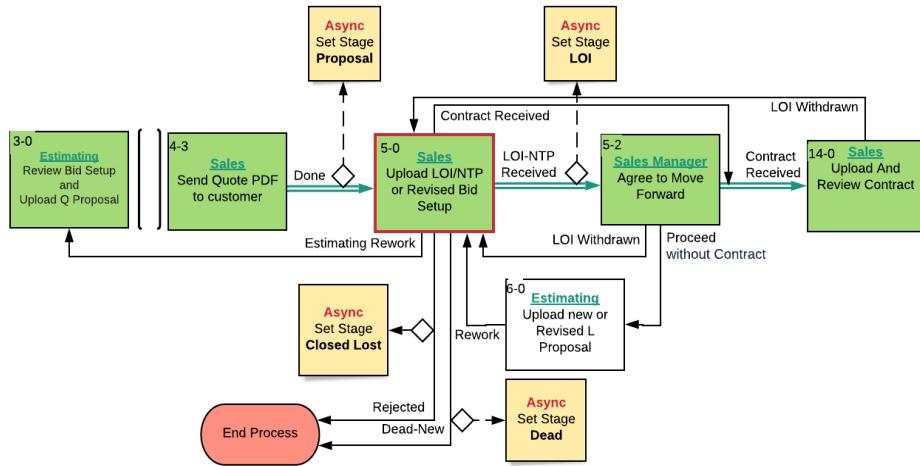
Screenshot - Sales – Step 5-0 Upload LOI/NTP or Revised Bid Setup – Contracting Process

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 Proposals" 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

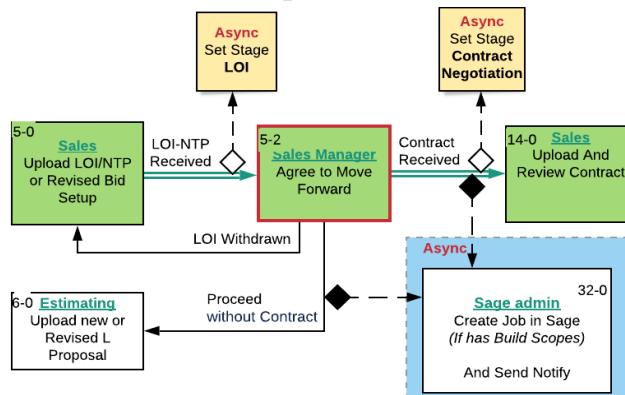
Action for Step 5-2 Agree to Move Forward Step

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.

Attachments			
	FILE NAME	TYPE	UPDATED DATE
	LOI Proposal PDF	LOI Proposal PDF.txt	Test3 16.03.2021
LOI Proposal	1902_5.xlsx		Test3 16.03.2021
NTP	LOI-NTP.txt		3.0 B K2:SMARTK2\K2Test1 15.03.2021
Price Quote PDF	PriseQuote PDF.txt		0.00 KB K2:SMARTK2\K2Test3 15.03.2021
Price Quote	1902_5.xlsx		2.84 MB K2:SMARTK2\K2Test3 15.03.2021
Bid Setup	Q file.xlsx		2.84 MB K2:SMARTK2\K2Test3 12.03.2021
Construction Drawings	Bid Setup.txt		3.0 B K2:SMARTK2\K2Test1 12.03.2021
Bid Setup	Construction Drawings.txt		3.0 B K2:SMARTK2\K2Test1 12.03.2021
	letter.txt		96.0 KB K2:SMARTK2\K2Test1 28.02.2021

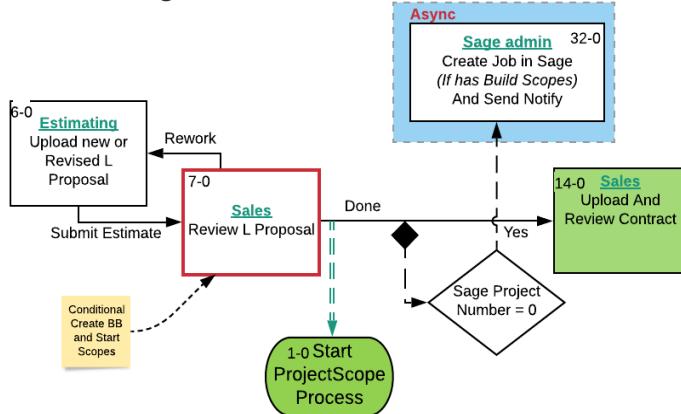
Screenshot - Sales – Step 7-0 Review L Proposal– Contracting Process

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.

Customer Name & Legal Name:	Test Company	Contract Value:
Job Name:	TestCCPMaryna1303	Final SOV Gross Margin %:
Bid / Take-off Estimator:	K2Test3	PAM 2 Score:
Review Estimator:	K2Test5	D&B Bad Debt Risk:
Sales Person:	K2Test1	D&B Cash Flow Risk:
PM:		Deposit Amount:
Product Delivery Date:	20.03.2021	Retainage:
Scope:	Cabinets, Countertops, Flooring - Base	Overhead/Fees for COs:
Sales validate Contract \$\$ = Bid (initials of reviewer):		
Estimating validate Contract \$\$ = Bid (initials of reviewer):		
Is this a prevailing wage job? Y/N:		
Is this Tax Exempt? Y/N - If No, list Sales Tax Rate:		

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

CCP Workflow / ContractingProcess / Project
OPN-000001597 - TestCCPMaryna1309 - Test Company
14-0 Upload And Review Contract Step

Welcome: K2Test1

Project Information

Legal Requests

Onsite Storage: Yes No
Supply Only: Yes No
Equipment: Yes No
Deposit: Yes No
Warranty Impacts: Yes No
Tariff Tax Changes: Yes No
Certified Payroll: Yes No
Dedicated Onsite: Yes No
Textura Licenses: Yes No
OCI Per CCIP: Yes No

Type a value
Type a value
Type a value
Type a value
Type a value

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

CCP Workflow / ContractingProcess / Project
OPN-000001706 - Maryna28/05 - CP Build
14-0 Upload And Review Contract Step

Welcome: K2Test1

Project **Include/Exclude** **Q/A List** **Approval Notes** **Contract Review** **Contract Information**

Bluebeam Studio Project Number: 467-248-500
Customer Name: * CP Build
Contact: * K2Test5 K2Test5
Primary Developer Name:
Project Name: * Maryna28/05
Project Description:

First Delivery Date: * 29.05.2021
Project Type: Multi-Family
Opportunity Stage: * Contract Negotiation
Project Manager:
Project Coordinator:
Build GM %: 53.63
Flooring GM %: 33.36
Build Total: \$1,352,670.46
Flooring Total: \$690,788.40
Total Amount: \$2,043,458.86

Contract: *

Please Select and Upload the mandatory Files for the Contract.

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:

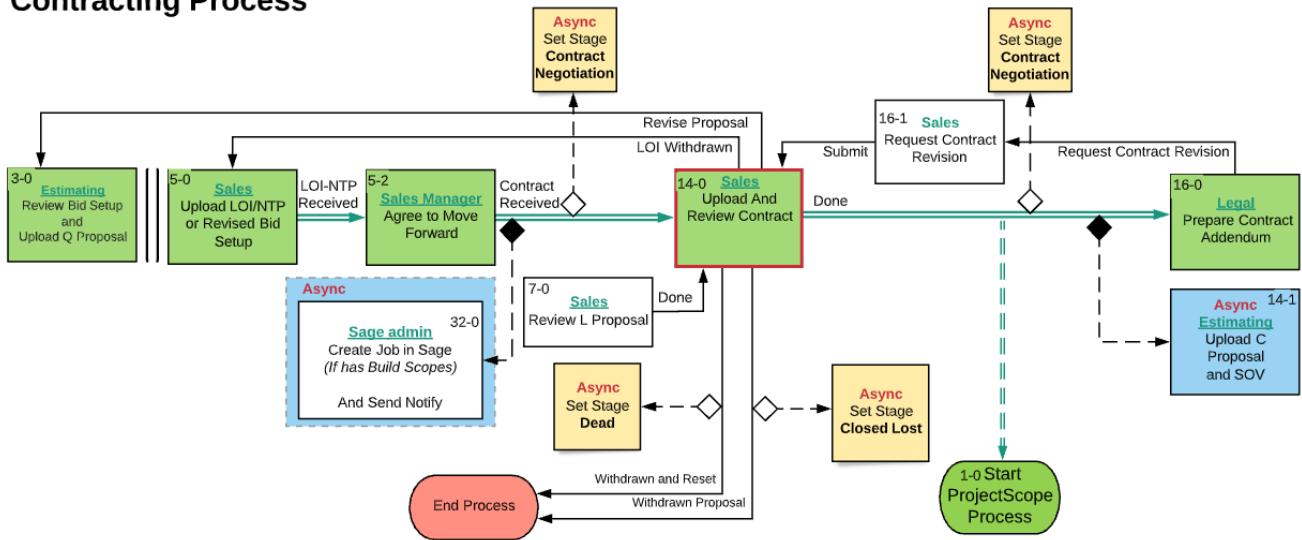
1. On the “[Contract Review](#)” Tab, click the Edit button and fill in the fields with the data that is available. The user can learn how to work with the corresponding tabs in the section “[Form Images and Descriptions](#),” which is outlined above.
2. Go to the “[Contract Information](#)” Tab in the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

Contracting Process



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.

CCP Workflow / ContractingProcess / Project
OPN-000001706; Maryna28/05 - CP Build

16-1 Request Contract Revision Step

Welcome: K2Test1

Action for Step 16-1 Request Contract Revision

Enter description of interaction with customer.
Set Action to "Submit" and click Submit.

Lucidchart

Comment:
Type a value

Enter description of interaction with customer.

Task Actions: Select an item ▾

Submit Close

Project Include/Exclude Q/A List Approval Notes Contract Review

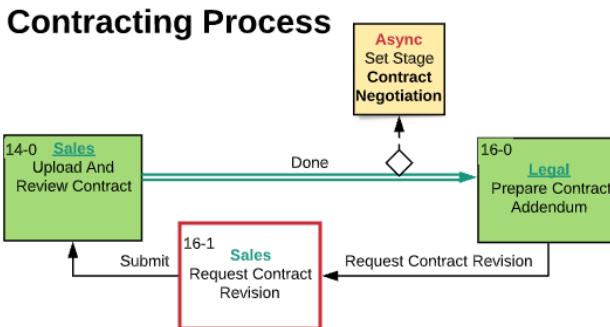
Customer Name & Legal Name: CP Build Contract Value: \$3,131,024.14
Job Name: Maryna28/05 Final SOV Gross Margin %: 46.78

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.

CCP Workflow / ContractingProcess / Project
OPN-000001706; Maryna28/05 - CP Build

19-0 Send Signed Contract to Customer Step

Welcome: K2Test1

Project Include/Exclude Q/A List Approval Notes Contract Review

Bluebeam Studio Project Number: 467-248-500
Customer Name: CP Build
Contact: K2Test5 K2Test5
Primary Developer Name:
Project Name: Maryna28/05
Project Description:

First Delivery Date: 29.05.2021
Project Type: Multi-Family
Opportunity Stage: Contract Negotiation
Project Manager:
Project Coordinator:
Build GM %: 53.63
Flooring GM %: 33.36
Build Total: \$1,352,670.46
Flooring Total: \$690,788.40
Total Amount: \$2,043,458.86

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.

The screenshot shows the CCP Workflow interface for the '19-1 Upload Countersigned Contract from Customer Step'. The top navigation bar includes 'CCP Workflow / ContractingProcess / Project', 'OPN-000001706: Maryna28/05 - CP Build', and 'Welcome: K2Test1'. The main form has tabs for 'Project', 'Include/Exclude', 'Q/A List', 'Approval Notes', and 'Contract Review'. The 'Project' tab is active. It contains fields for 'Bluebeam Studio Project Number' (467-248-500), 'Customer Name' (CP Build), 'Contact' (K2Test5 K2Test5), 'Primary Developer Name', 'Project Name' (Maryna28/05), and 'Project Description'. To the right, there are sections for 'First Delivery Date' (29.05.2021), 'Project Type' (Multi-Family), 'Opportunity Stage' (Contract Negotiation), 'Project Manager', 'Project Coordinator', 'Build GM %' (53.63), 'Flooring GM %' (33.36), 'Build Total' (\$1,352,670.46), 'Flooring Total' (\$690,788.40), and 'Total Amount' (\$2,043,458.86). A callout box with a green border and rounded corners points to the 'Contract:' field, which has a 'Select' button and an 'Upload' button. The callout contains the text 'Please Select and Upload the mandatory Files for the Contract.'

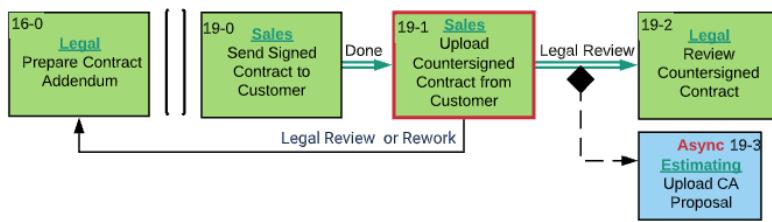
Screenshot - Sales – Step 19-1 Upload Countersigned Contract from Customer – Contracting Process

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.

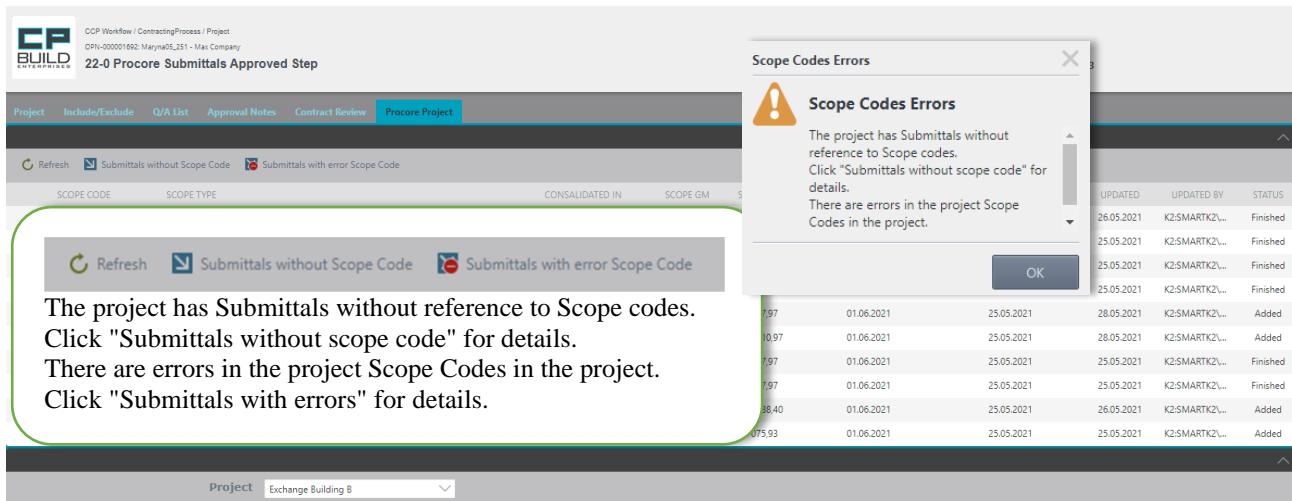
Contracting Process



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.



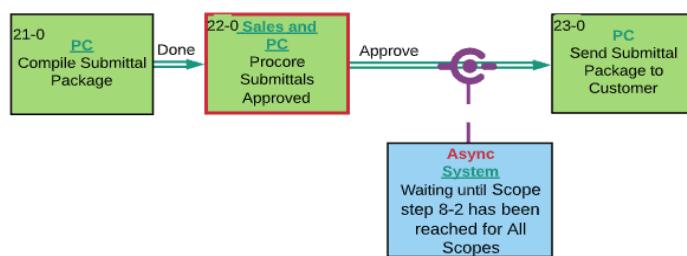
Screenshot - Sales – Step 22-0 Procore Submittals Approved – Contracting Process

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.

Contracting Process



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.

CCP Workflow / AsyncStepsProcess / Project Async
Async task for CRN-0000011515: TestMax_19_3 - Max Company: Transition meeting Process
66-0 Start Transition meeting Step
Welcome: K2Test1

Project Include/Exclude Q/A List Approval Notes Contract Review

Bluebeam Studio Project Number: 800-882-828
Customer Name: * Max Company
Contact: * Max Max Max
Primary Developer Name:
Project Name: * TestMax_19_3
Project Description:

First Delivery Date: * 10.07.2021
Project Type:
Opportunity Stage: * Closed Won
Project Manager: K2Test5
Project Coordinator: K2Test3
Build GM %: 53.12
Flooring GM %: 34.68
Build Total: \$1,439,746.40
Flooring Total: \$777,864.33
Total Amount: \$2,217,610.73

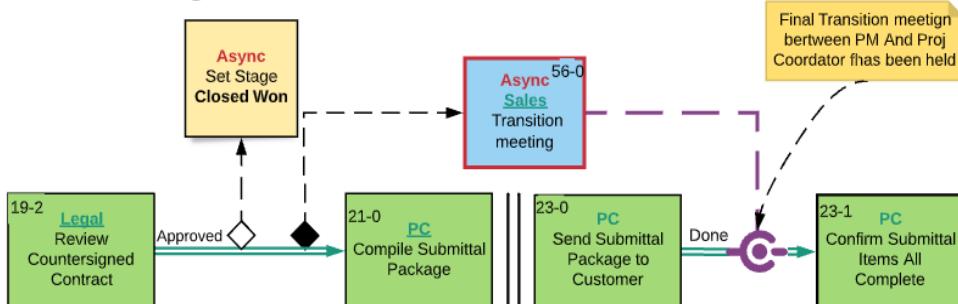
Screenshot - Sales – Step 56-0 Start Transition meeting – Contracting Process

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.

Contracting Process



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".

Estimating

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.

There are three tabs available for this step: Opportunity, Include / Exclude and Q / A.

In this step, it is imperative to fill out the Co-worker Take off Review and, if necessary, you can change the Estimator.

After Upload of the required Q-file, the Project Scope will appear in the Attachment List and the data in certain fields will be updated.

SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED E	STATUS
CAB	Cabinets	24 581,85	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	
TOPI	Countertops	28,25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added
FLRB	Flooring - Base	706 362...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	

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.

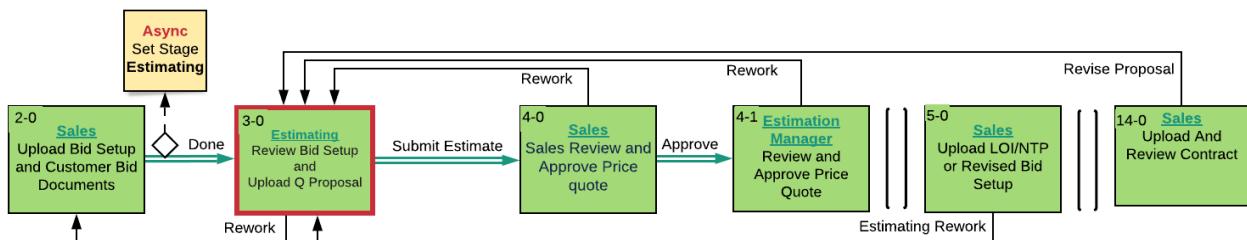
- The action "**Assign Estimator**" entrusts the task to another Estimator. For this to occur, the current Estimator must select the desired "Estimator" in the drop-down list. This action does not require uploading the Q file.

- 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.

The screenshot shows the CCP Workflow interface for the 'Opportunity' step. At the top, it displays 'CCP Workflow / ContractingProcess / Opportunity' and 'OPN-000001597 - TestCCP(Maynta1303 - Test Company)'. On the right, it says 'Welcome: K2Test2'. Below the header, there's a navigation bar with tabs: 'Opportunity', 'Include/Exclude', 'Q/A List', and 'Approval Notes'. The main area is titled 'Attachment List' and shows a table with two rows of attachments. The columns are: TYPE, FILE NAME, META DATA TAG, FILE SIZE, UPDATED BY, and UPDATED DATE. The attachments are 'Price Quote' files named '1902_5.xlsx' and '1902_6.xlsx', both updated by 'K2SMARTK2\K2Test3' on 13.03.2021. Below the attachment list is the 'Approval Notes' section, which contains a table with two rows of notes. The columns are: NOTE NUMBER, STEP NUMBER, SCOPE, NOTE, COMPLETED, USER, and DATE. The notes are for steps 4-0 and 4-1, both with 'Flooring - Base' scope and 'Add Note Here' note, both completed by 'K2Test1' on 13.03.2021.

TYPE	FILE NAME	META DATA TAG	FILE SIZE	UPDATED BY	UPDATED DATE
Price Quote	1902_5.xlsx		2.84 MB	K2SMARTK2\K2Test3	13.03.2021
Price Quote	1902_6.xlsx		2.84 MB	K2SMARTK2\K2Test3	13.03.2021

NOTE NUMBER	STEP NUMBER	SCOPE	NOTE	COMPLETED	USER	DATE
1	4-0	Flooring - Base	Add Note Here	No	K2Test1	13.03.2021
2	4-1	Flooring - Base	Add Note Here	No	K2Test2	13.03.2021

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 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.

The screenshot shows the CCP Workflow interface for the Contracting Process. The top navigation bar includes links for CP BUILD ENTERPRISES, CCP Workflow / ContractingProcess / Opportunity, CPN-000001597 TestCCPMaryna1303 - Test Company, and Welcome: K2Test3. The main content area displays the Opportunity tab with sections for Attachment List and Approval Notes. The Approval Notes table shows two rows:

NOTE NUMBER	STEP NUMBER	SCOPE	NOTE	COMPLETED
1	4-0	Flooring - Base	Add Note Here	Yes
2	4-1	Flooring - Base	Add Note Here	Yes

A green callout box highlights the 'Completed' column with the text: "If Approval Notes were created on previous steps, user needs to Complete Approval Notes".

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

CCP Workflow / ContractingProcess / Opportunity
OPN-000001583 - Test CCP - Test Company
4-2 Prepare Quote PDF Step

Welcome: K2Test3

Opportunity Number: OPN-000001583
Customer Name: * Test Company
Contact:
Opportunity Name: * Test CCP
Opportunity Description: TestDescription
Project Type: Student Housing
Opportunity Stage: * Estimating
Co-worker Takeoff Review: * K2Test5
Estimator: * K2Test3
Q File: * Select
Price Quote PDF: * Select Upload

CRM System Reference: 0063C00000C6mYQAJ
First Delivery Date: * 02.03.2021
Sales Owner: * K2Test1
Build GM %: 27.36
Flooring GM %: 28.95
Build Total: \$168,615.78 Build GM %: 27.36
Flooring Total: \$706,362.40 Flooring GM %: 28.95
Total Amount: \$874,978.18
Build Total: \$168,615.78
Flooring Total: \$706,362.40
Total Amount: \$874,978.18

After Upload, the required Q-file and Price Quote PDF appear in Attachment List and the data in certain fields will be updated.

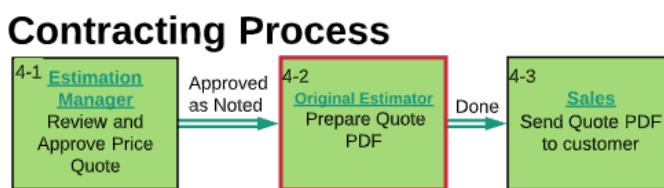
Project Scopes							
SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED F
CAB	Cabinets	24 581,85		19.03.2021	13.03.2021	13.03.2...	K2:SMA... Added
TOPI	Countertops	28,25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2:SMA... Added
FLRB	Flooring - Base	706 362...		19.03.2021	13.03.2021	13.03.2...	K2:SMA... Added

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.

The screenshot shows the CCP Workflow Contracting Process Opportunity screen. At the top, it displays the path CCP Workflow / ContractingProcess / Opportunity and the specific opportunity number OPN-000001597. The main content area shows various fields like Opportunity Number, Customer Name, Contact, Opportunity Name, Opportunity Description, Project Type, Opportunity Stage, Estimator, CRM System Reference, First Delivery Date, Sales Owner, and Build GM %. A large green callout box points to the 'L File' and 'LOI Proposal PDF' upload sections, stating: "Upload L-file and LOI Proposal PDF, will appear in the Attachment List and the data in certain fields will be updated." Another green callout box points to the 'Project Scopes' table, which lists CAB, TOPI, and FLRB scopes with their respective details. The bottom right corner of the screenshot has a double-headed vertical arrow indicating a relationship between the two highlighted areas.

SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED E	STATUS
CAB	Cabinets	24 581.85	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	
TOPI	Countertops	28,25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added
FLRB	Flooring - Base	706 362...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	

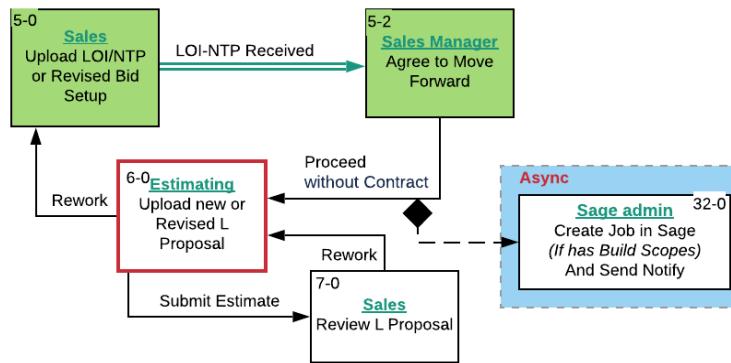
Screenshot - Estimating – Step 6-0 Upload new or Revised L Proposal – Contracting Process

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.

CCP Workflow / AsyncStepsProcess / Estimating Form
Async task for CPN-000001732 TestCCP80 - Max Company: Estimating Upload C File and SOV
14-1 Upload C Proposal and SOV Step

Welcome: K2Test3

Project	Include/Exclude	Q/A List	Approval Notes	Contract Review
Bluebeam Studio Project Number: 970-170-832	Customer Name: * Max Company	Contact: * Max Max Max	Primary Developer Name: CCP Sandbox Account 2:	Project Name: * TestCCP80
Project Description:				
First Delivery Date: * 10.07.2021	Project Type:	Opportunity Stage: * Contract Negotiation	Project Manager:	Project Coordinator:
Build GM %: 27.36	Flooring GM %: 28.95	Build Total: \$1,352,670.46	Flooring Total: \$690,788.40	Total Amount: \$874,978.18
Build GM %: 53.63	Flooring GM %: 33.36	Build Total: \$168,615.78	Flooring Total: \$706,362.40	
Floring GM %: 33.36	Build Total: \$1,352,670.46	Total Amount: \$2,043,458.86		
Floring Total: \$690,788.40	Flooring Total: \$706,362.40			
Total Amount: \$2,043,458.86				

C File: *
Select
Upload

Upload C-file will appear in Attachment List and the data in certain fields will be updated.

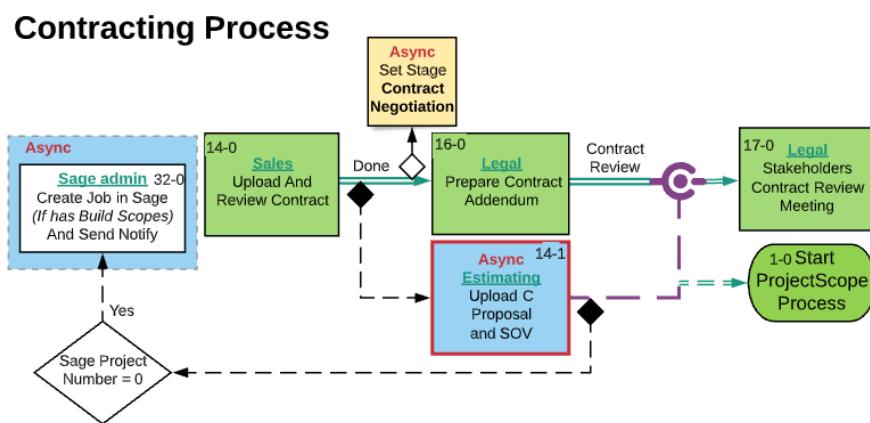
Project Scopes								
SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED F	STATUS
CAB	Cabinets	24 581.85	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	
TOPI	Countertops	28,25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added
FLRB	Flooring - Base	706 362...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	

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

Action for Step 14-1 Upload C Proposal and SOV

In 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.

CCP Workflow / AsyncStepProcess / Estimating Form
Async task for CRU000001714 DevIn_00032021 - Max Company Estimating Upload Contract Addendum Proposal
19-3 Upload CA Proposal Step

Welcome: K2Test3

Project		Include/Toggle		Q/A List		Approval Notes		Contract Review	
Bluebeam Studio Project Number:		Customer Name:	Max Company	First Delivery Date:	02.06.2021	Project Type:		Opportunity Stage:	Closed Won
Contact:	Max Max Max	Primary Developer Name:		Project Manager:	K2Test5	Project Coordinator:		Build GM %:	27.36
Project Name:	Pavlo_06022021	Project Description:		Build GM %:	0.00	Flooring GM %:	28.95	Build Total:	\$168,615.78
				Flooring GM %:	0.00	Flooring Total:	\$706,362.40	Total Amount:	\$874,978.18
CA File:	Select	Upload							

Upload CA-file will appear in Attachment List and the data in certain fields will be updated.

Project Scopes

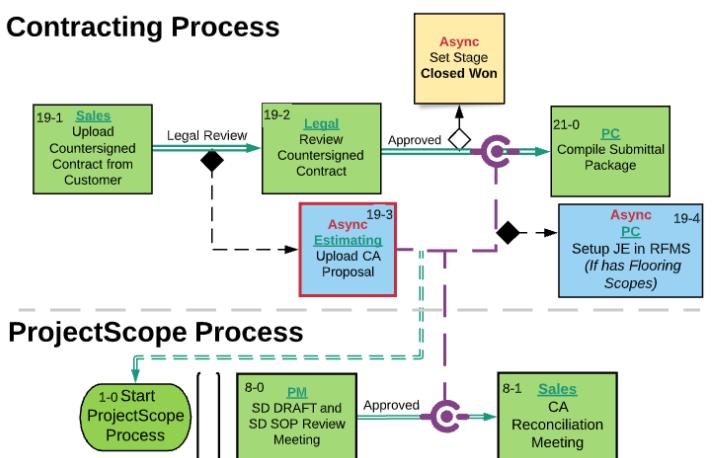
SCOPE CODE		SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED E	STATUS
CAB	Cabinets		24 581.85	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	
TOPI	Countertops		28,25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added
FLRB	Flooring - Base		706 362...	19.03.2021	13.03.2021	13.03.2...	K2:SMA...	Added	

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.

CCP Workflow / AsyncStepsProcess / Project Async
Async task for OPN-00000115: TestMax_19_3 - Max Company: Project Accounting of Additional Expenses Process
58-0 Upload OPS Proposal Step

Welcome: K2Test7

Project [Include/Exclude](#) [Q/A List](#) [Approval Notes](#) [Contract Review](#)

Bluebeam Studio Project Number: 800-882-828
Customer Name: * Max Company
Contact: * Max Max Max
Primary Developer Name:
Project Name: * TestMax_19_3
Project Description:

First Delivery Date: * 10.07.2021
Project Type:
Opportunity Stage: * Closed Won
Project Manager: K2Test5
Project Coordinator: K2Test3
Build GM %: 53.12
Flooring GM %: 34.68
Build Total: \$1,439,746.40
Flooring Total: \$777,864.33
Total Amount: \$2,217,610.73

OPS Proposal File: *
[Select](#) [Upload](#)

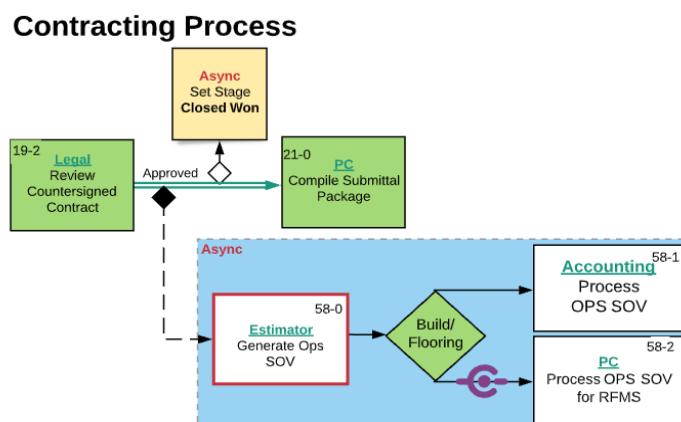
Please Select and Upload the mandatory Files for the OPS Proposal File.

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.

CCP Workflow / AsyncStepsProcess / Estimating Form
Async Task for CPN-000001973: Varyna05_082 - Mai Company: Estimating Revised Clean Proposal
23-2 RS Proposal Step

Welcome: K2Test3

Project | Include/Exclude | Q/A List | Approval Notes | Contract Review | Procure Project

Bluebeam Studio Project Number: 180-435-166
Customer Name: * Max Company
Contact: * Max Max Max
Primary Developer Name:
Project Name: * Maryna05_082
Project Description:

First Delivery Date: * 15.05.2021
Project Type:
Opportunity Stage: * Closed Won
Project Manager: K2Test5
Project Coordinator: K2Test3

Build GM %: 48.11
Flooring GM %: 33.36
Build Total: \$1,715,494.75
Flooring Total: \$690,788.40
Total Amount: \$2,406,283.15
Build GM %: 27.36
Flooring GM %: 28.95
Build Total: \$168,615.78
Flooring Total: \$706,362.40
Total Amount: \$874,978.18

Sage Job Project: *
RMIS JE Number: * 2
RMIS SI Number: * 9

RS Proposal File: *
Select | Upload

Project Scopes

SCOPE CODE	SCOPE TYPE	SCOPE GM	SCOPE TOT	FDD	CREATED	UPDATED	UPDATED I	STATUS
CAB	Cabinets	24 581.85	19.03.2021	13.03.2021	13.03.2...	K2SMA...	Added	
TOPI	Countertops	28.25	144 033...	19.03.2021	13.03.2021	13.03.2...	K2SMA...	Added
FLRB	Flooring - Base	706 362...	19.03.2021	13.03.2021	13.03.2...	K2SMA...	Added	

Upload CA-file will appear in the Attachment List and the data in certain fields will be updated.

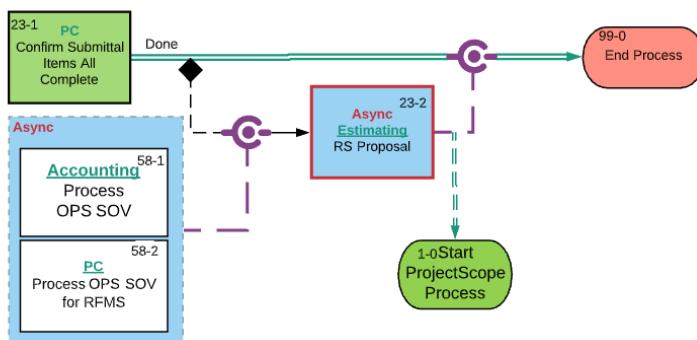
Screenshot - Estimating – Step 23-2 RS Proposal – Contracting Process

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.

Contracting Process



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.

CCP Workflow / AsyncStepsProcess / Project Async
Async task for OPN-000001583: Test CCP - Test Company: Create Job in Sage
32-0 Create Job in Sage Step

Welcome: K2Test5

Project	Include/Exclude	Q/A List	Approval Notes	Contract Review
Bluebeam Studio Project Number: <input type="text" value="722-390-368"/>	Customer Name: <input type="text" value="Test Company"/>	Contact: <input type="text" value="Test CCP"/>	First Delivery Date: <input type="text" value="02.03.2021"/>	Project Type:
Project Name: <input type="text" value=""/>	Opportunity Stage: <input type="text" value="Contract Negotiation"/>	Project Manager:	Build GM %: <input type="text" value="27.36"/>	Flooring GM %: <input type="text" value="28.95"/>
Project Description: <input type="text" value=""/>	Project Coordinator:	Build Total: <input type="text" value="\$168,615.78"/>	Flooring Total: <input type="text" value="\$706,362.40"/>	Total Amount: <input type="text" value="\$874,978.18"/>
		Sage Job Project: <input type="text" value="Type a value"/>		

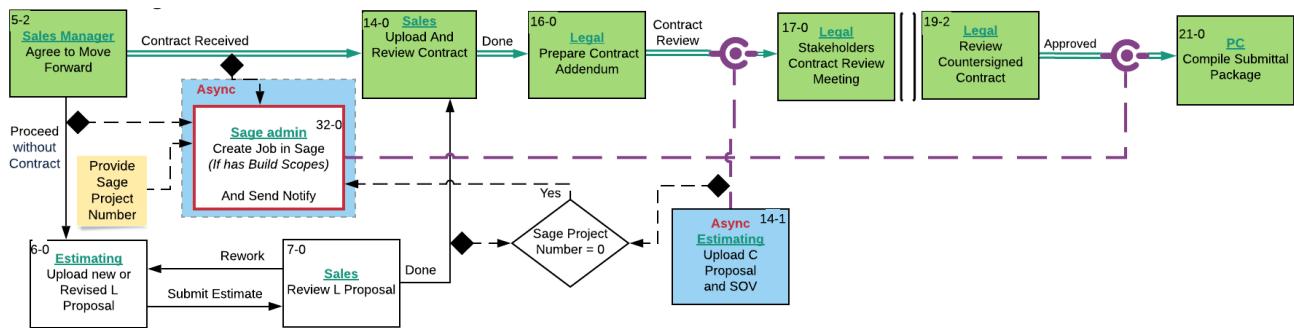
Screenshot – Sage admin – Step 32-0 Create Job in Sage – Contracting Process

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.

CCP Workflow / ContractingProcess / Project
OPN-000001597: TestCCPMaryna1303 - Test Company
16-0 Prepare Contract Addendum Step
Welcome: K2Test6

Project Include/Exclude Q/A List Approval Notes **Contract Review**

Customer Name & Legal Name: Test Company
Job Name: TestCCPMaryna1303

Sales Person: K2Test1
PM:

1. After loading the information, click the Save button.

2. Download the generated file by clicking on it with the left mouse button.

Contract Review Checklist PDF: [Legal Review Questionnaire.pdf \(PDF File\)](#) **Download**

Contract Value: test 1
Final SOV Gross Margin %: 85
PAM 2 Score: 85
D&B Bad Debt Risk: test 2
D&B Cash Flow Risk: test 4
Deposit Amount: test 5
Retainage: test 3
Overhead/Fees for COC: test 6
Sales validate Contract \$\$ = Bid initials of reviewer: test 7
Estimating validate Contract \$\$ = Bid initials of reviewer: test 8
Is this a prevailing wage job? Y/N: No
Is this Tax Exempt Y/N - If No, list Sales Tax Rate: Yes

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

CCP Workflow / ContractingProcess / Project
OPN-000001731: TestPrimaryDeveloper - Max Company
16-0 Prepare Contract Addendum Step
Welcome: K2Test6

Project Include/Exclude Q/A List Approval Notes **Contract Review**

Bluebeam Studio Project Number: 666-955-047
Customer Name: * Max Company

Contact: * Max Max

Primary Developer Name: Cottonwood Residential Inc.

Project Name: * TestPrimaryDeveloper

1. Change the value of the D&B rating, if necessary.

D&B Rating: Type a value
Build GM %: 53.63
Flooring GM %: 33.36
Build Total: \$1,352,670.46
Flooring Total: \$690,788.40
Total Amount: \$2,043,458.86

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

Action for Step 16-0 Prepare Contract Addendum

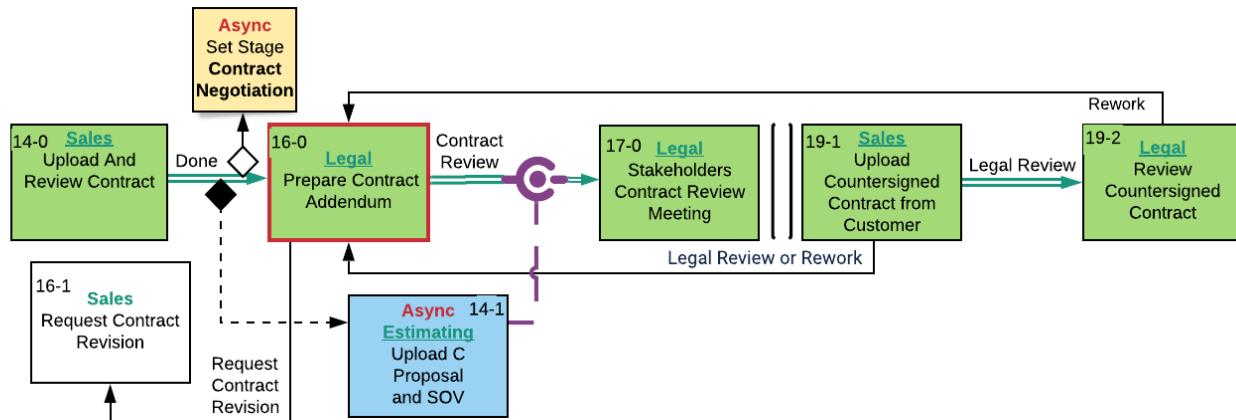
In this step, the user needs to:

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.

CCP Workflow / ContractingProcess / Project
OFN-000001107-Pavlo_1_05292021 - Max Company

Welcome: K2Test6

Project Include/Exclude Q/A List Approval Notes Contract Review

Blushbeam Studio Project Number: 152-970-555

First Delivery Date: * 31.05.2021
Confirmed

Project Type:

Opportunity Stage: * Contract Negotiation

Project Manager:

Project Coordinator:

Build GM %: 53.63
Flooring GM %: 33.36
Build Total: \$1,352,670.46
Flooring Total: \$690,788.40
Total Amount: \$2,043,458.86

Contract Addendum: *

Select Upload

Legal Review Meeting Notes:

Select Upload

PAM2 Spreadsheet:

Select Upload

Confirm the "First Delivery Date," by checking the box.

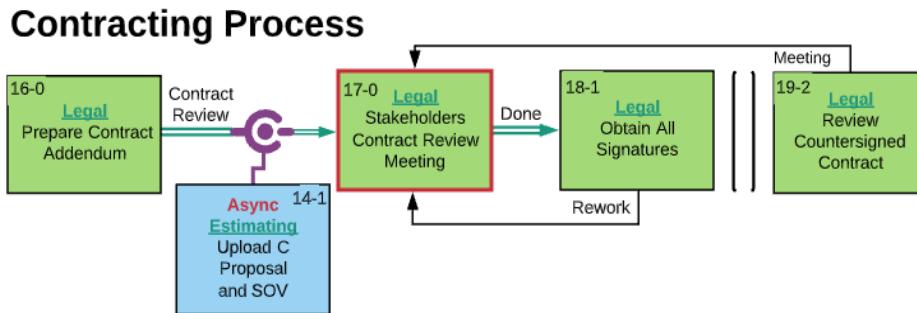
Select and upload the required Contract Addendum file. There is also the option to upload "Legal Review Meeting Notes", "PAM2 Spreadsheet."

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.

The screenshot shows the CCP Workflow interface for the Contracting Process. The top navigation bar includes 'CCP Workflow / ContractingProcess / Project', 'CP BUILD ENTERPRISES', 'CPN-0000001708_Pavlo_2_05292021 - Max Company', and 'Welcome: K2Test6'. The main content area displays the '18-1 Obtain All Signatures Step' page. The page has tabs for 'Project', 'Include/Exclude', 'Q/A List', 'Approval Notes', and 'Contract Review'. The 'Project' tab is active. It contains fields for 'Customer Name' (Max Company), 'Contact' (Max Max Max), 'Primary Developer Name', 'Project Name' (Pavlo_2_05292021), and 'Project Description'. To the right, there are sections for 'First Delivery Date' (31.05.2021), 'Project Type', 'Opportunity Stage' (Contract Negotiation), 'Project Manager' (K2Test5), 'Project Coordinator', and financial details like 'Build GM %' (53.63), 'Flooring GM %' (33.36), 'Build Total' (\$1,352,670.46), 'Flooring Total' (\$690,788.40), and 'Total Amount' (\$2,043,458.86). At the bottom left, there are 'Contract' dropdowns with 'Select' and 'Upload' buttons, and a callout box with the text 'Select and upload the required Contract file.'.

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

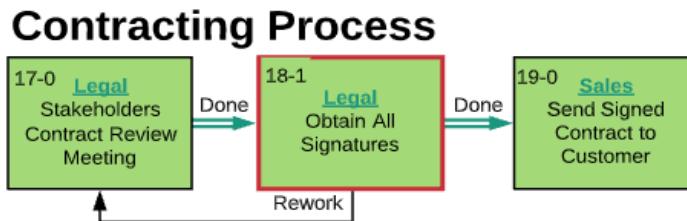
Action for Step 18-1 Obtain All Signatures

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.

CCP Workbox | ContractingProcess | Project
QIN-2000111005_Maryna2B/OS - CP Build
19-2 Review Countersigned Contract Step
Welcome: K2Test6

Project Include/Exclude Q/A List Approval Notes Contract Review

Bluebeam Studio Project Number: 467-248-500
Customer Name: CP Build
Contact: K2Test5 K2Test5
Primary Developer Name:
Project Name: Maryna2B/OS
Project Description:

First Delivery Date: 29.05.2021
Project Type: Multi-Family
Opportunity Stage: Contract Negotiation
Project Manager:
Project Coordinator:

Build GM %: 59.63
Flooring GM %: 33.36
Build Total: \$1,352,670.46
Flooring Total: \$690,788.40
Total Amount: \$2,043,458.86

Project Scopes
Action for Step 19-2 Review Countersigned Contract

Review Countersigned Contract
Set Action to “Approved”, “Meeting” or “Rework” and click Submit. Action “Approved” will be changed Stage to “Closed-won”; Action “Meeting” requires a comment and returns to the Step “Stakeholders Contract Review Meeting”; Action “Rework” requires a comment and returns to the Step “Prepare Contract Addendum”.

Comment: Type a value

Attachments
Refresh + Download
Selected Filter: Default Quick Search:
FILE NAME
TYPE
LOI Proposal
LOI Proposal PDF
Marina_Project.xlsx
111.xlsx
3.0 MB
2.0 MB
K2-SMARTICK/K2Test3
K2-SMARTICK/K2Test3
29.05.2021
29.05.2021

In the Attachments List, you can Download and Review Countersigned Contract.

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

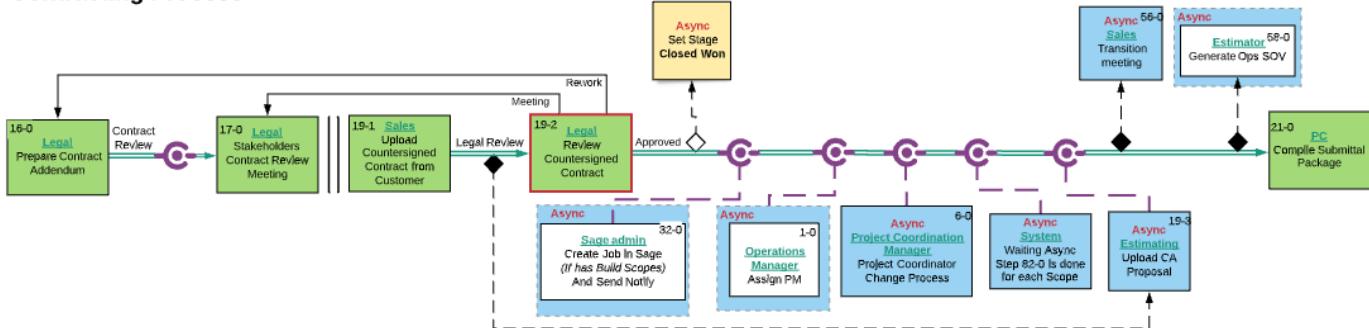
Action for Step 19-2 Review Countersigned Contract

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.

Contracting Process

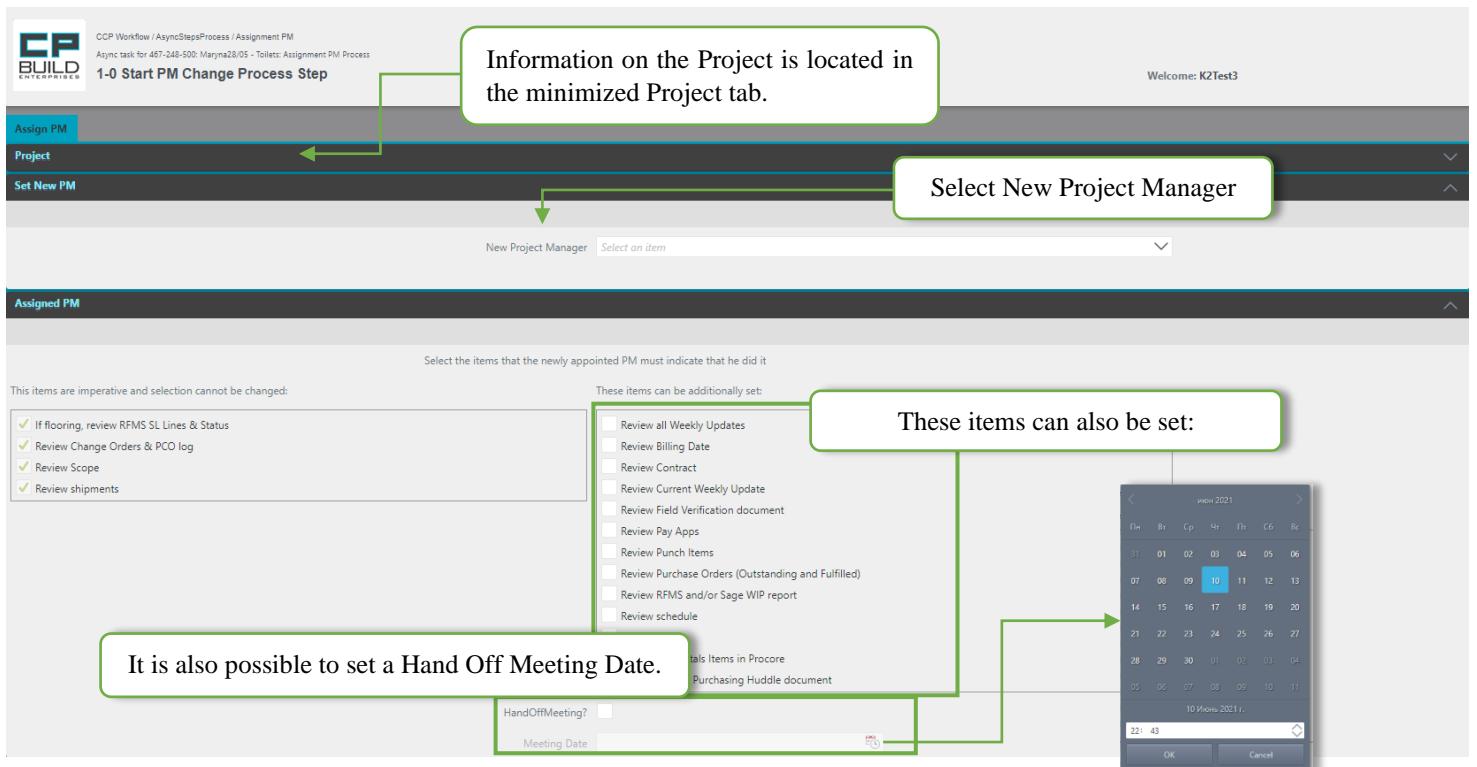


Screen shot - Lucid Chart – Step 19-2 Review Countersigned Contract – Contracting Process

Operations Manager

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.



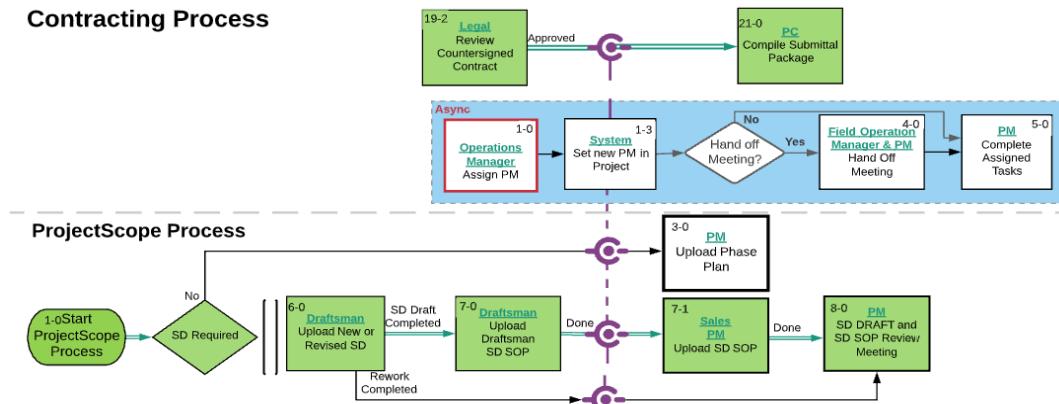
Screenshot – Operation Manager – Step 1-0 Start PM Change Process – Contracting Process

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 check-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.

Contracting Process

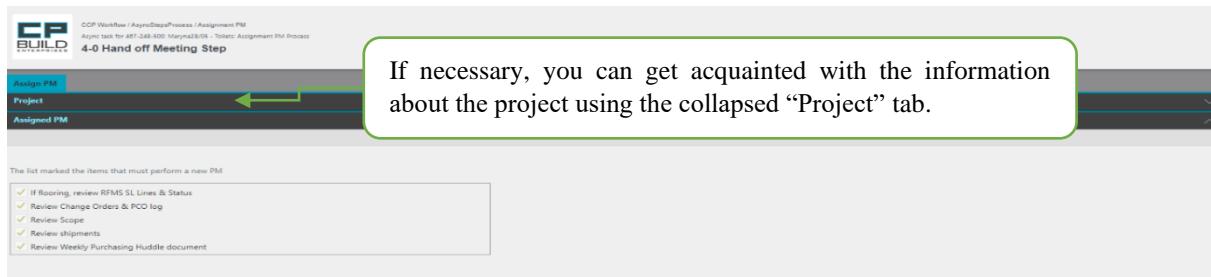


Screenshot - [Lucid Chart](#) – Step 1-0 Start PM Change Process – Contracting Process

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.

Contracting Process

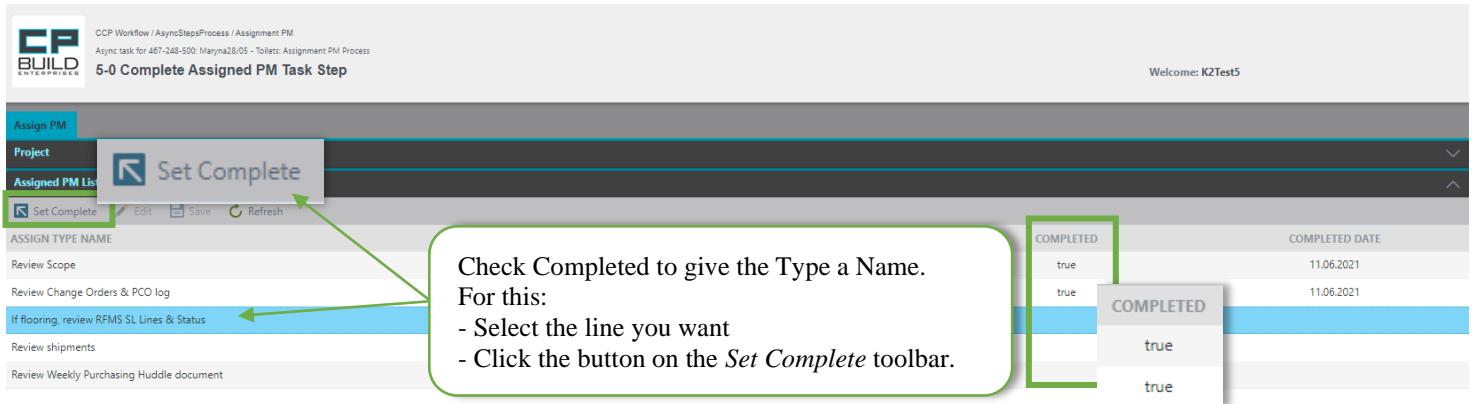


Screenshot - [Lucid Chart](#) – Step 4-0 Hand off Meeting – Contracting Process

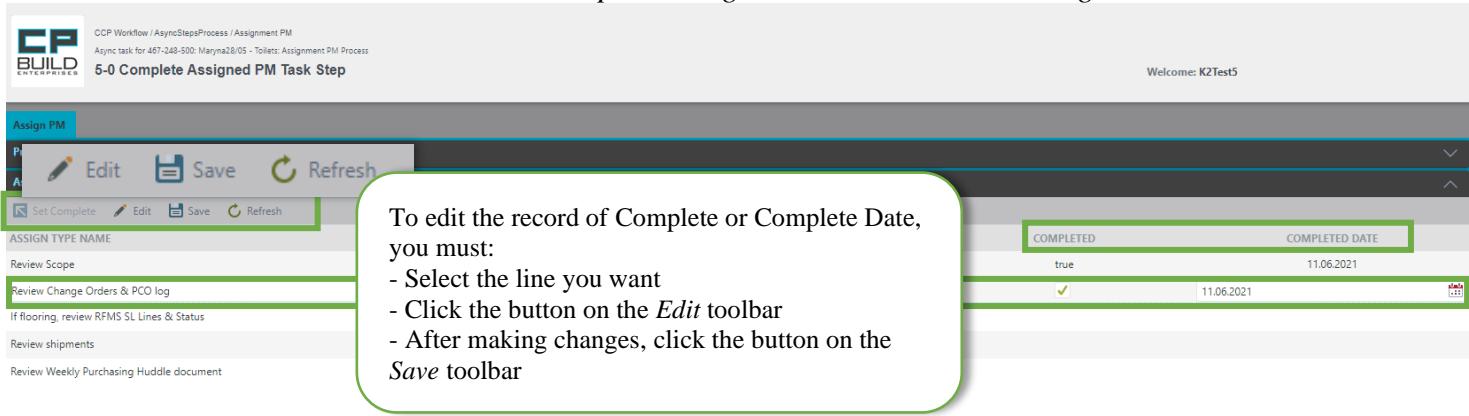
PM

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



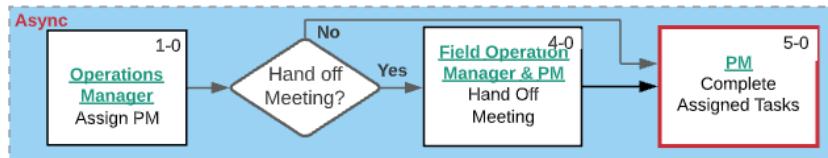
Screenshot – PM – 5-0 Complete Assigned PM Task – Contracting Process

Action for Step 5-0 Complete Assigned PM Task

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.

Contracting Process

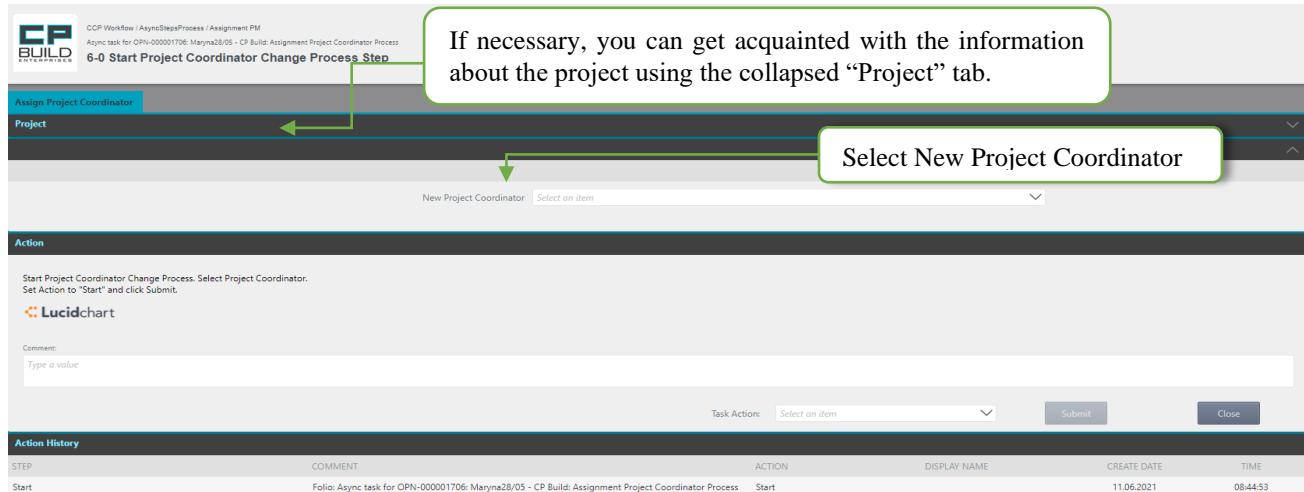


Screenshot - [Lucid Chart](#) – 5-0 Complete Assigned PM Task – Contracting Process

Project Coordination Manager

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.

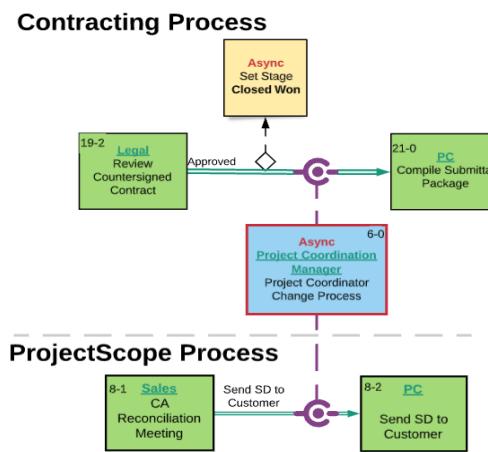


Screenshot – Project Coordinator Manager – Step 6-0 Start Project Coordinator Change Process – Contracting Process

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

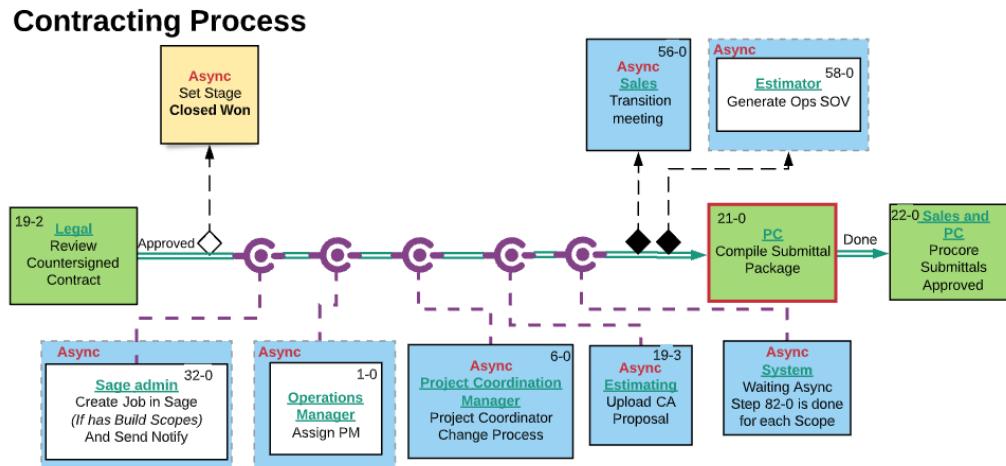
Step 21-0 Compile Submittal Package. If after Step "19-2 Review Countersigned Contract Step, Steps 82-0 have not yet been completed for each individual Scope in the project, the process will be blocked and will not be able to get to "21-0 Compile Submittal Package Step ". If needed, compare the current 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.

CCP Workflow / AsyncStepsProcess / Project Async
Async task for OPN-000001705: Pavlo_3_05282021 - Max Company: Setup JE in RFMS
19-4 Setup JE in RFMS Step

Welcome: K2Test7

Project Include/Exclude Q/A List Approval Notes Contract Review

Bluebeam Studio Project Number: 125-481-212
Customer Name: * Max Company
Contact: * Max Max Max
Primary Developer Name:
Project Name: * Pavlo_3_05282021
Project Description:

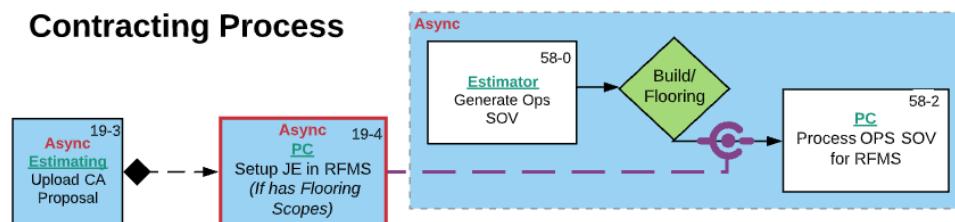
First Delivery Date: * 31.05.2021
Project Type:
Opportunity Stage: * Contract Negotiation
Project Manager: K2Test5
Project Coordinator:
Build GM %: 53.12
Flooring GM %: 34.68
Build Total: \$1,439,746.40
Flooring Total: \$777,864.33
Total Amount: \$2,217,610.73
RFMS JE Number: * Type a value

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.

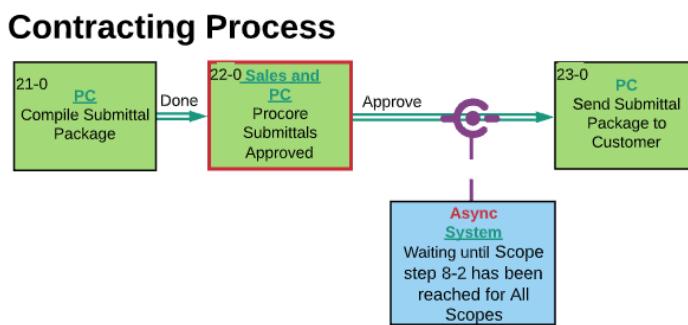
The screenshot shows the CCP Workflow interface for the Contracting Process. At the top, there's a header with the CP BUILD logo and the project details: CCP Workflow / ContractingProcess / Project CPN-000001692: Maryma05_251 - Max Company. Below the header, the title is "22-0 Procore Submittals Approved Step". A navigation bar includes Project, Include/Exclude, Q/A List, Approval Notes, Contract Review, and Procore Project. The main area displays a table of scope codes with columns: SCOPE CODE, SCOPE TYPE, CONSOLIDATED IN, SCOPE GM, SCOPE TOTAL, EDD, CREATED, UPDATED, UPDATED BY, and STATUS. The table lists items like CABIU (Cabinets Units), FLRB (Flooring - Base), LVTD (Flooring - LVT), SKSU (Sinks Units), SKSC (Sinks Commons), TLS (Toilets), TOPIU (Countertops Units), VCT (Flooring - VCT), FLRD (Flooring - Domestic Co...), and TOPSKSIU (Tops/Sinks - Import Consol...). Above the table, a modal dialog titled "Scope Codes Errors" is open, containing an exclamation mark icon, the text "Scope Codes Errors", and instructions: "The project has Submittals without reference to Scope codes. Click "Submittals without scope code" for details. There are errors in the project Scope Codes in the project.", with an "OK" button. Below the table, there are two buttons: "Refresh" and "Submittals without Scope Code" (highlighted with a green oval), and another button "Submittals with error Scope Code". A callout box highlights this second button with the text: "The project has Submittals without reference to Scope codes. Click "Submittals without scope code" for details. There are errors in the project Scope Codes in the project. Click "Submittals with errors" for details."

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.

CCP Workflow | Contracting Process / Project
OPI-000001682, Maryna05_251 - Max Company
23-0 Send Submittal Package to Customer Step

Welcome: K2Test3

Project: Bluebeam Studio Project Number: 253-987-773

Customer Name: * Max Company

Contact: * Max Max Max

Primary Developer Name:

Project Name: * Maryna05_251

Project Description:

First Delivery Date: * 28.05.2021

Project Type: Multi-Family

Opportunity Stage: * Closed Won

Project Manager: K2Test5

Project Coordinator: K2Test3

Build GM %: 53.63

Flooring GM %: 33.36

Build Total: \$1,352,670.46

Flooring Total: \$690,788.40

Total Amount: \$2,043,458.86

Sage Job Project: * 7

RFMS JE Number: * 123

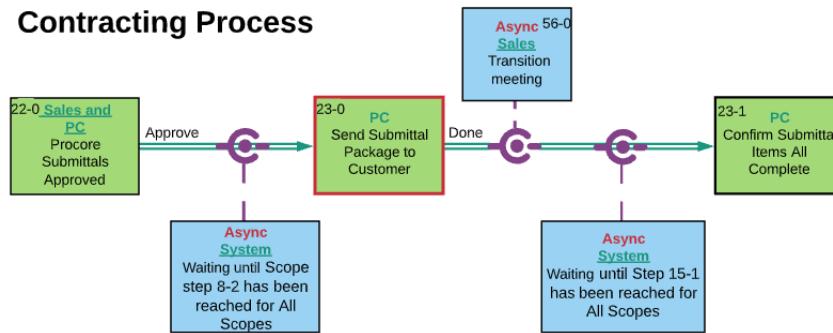
Procure Project: * Exchange Building B

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.

CCP Workflow / ContractingProcess / Project
CPN-000001692 Maryna03_251 - Max Company

Welcome: K2Test3

Project **Include/Exclude** **Q/A List** **Approval Notes** **Contract Review** **Procure Project**

Attachment List Note

Refresh Download
Selected Filter: Default
TYPE
Contract Addendum Proposal
Clean Proposal
ICO Proposal

Approval Notes

+ Add Edit Delete **Import**

NOTE NUMBER STEP NUMBER

23-1

Tops/Sinks - Import Consolidated Units
Select an item Type a value

1. From Attachments List, view and select required Price Quote file

2. On the Approval Notes, click the Add button and new row will appear.

3. In the Scope column, select from the drop-down list scope name that you need.

4. On the Note column, enter the note text

5. Click the Save button

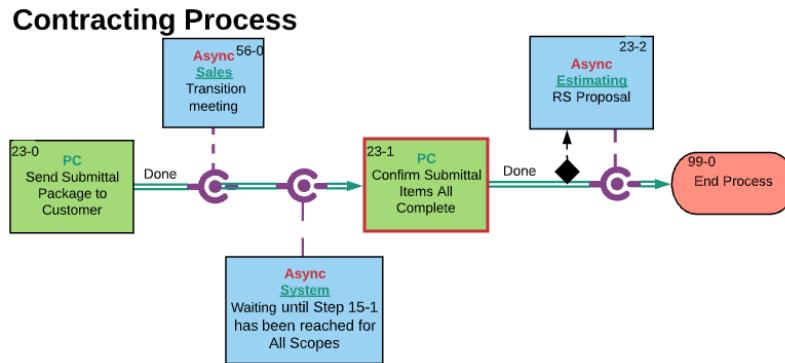
NOTE	COST IMPACT	COMPLETED	USER	DATE
			K2Test3	11.06.2021

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.

CCP Workflow / AsyncStepsProcess / Project Async
Async task for OPN-000001715: TestMax_19_3 - Max Company: Project Accounting of Additional Expenses Process
58-2 Process OPS SOV for RFMS Step

Welcome: K2Test2

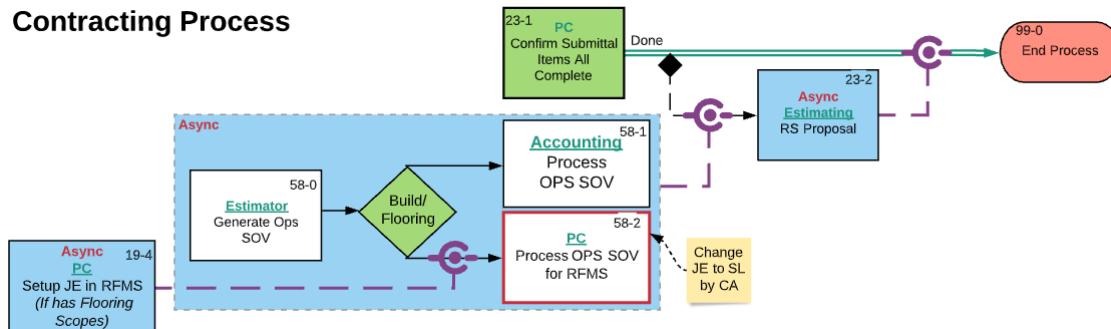
Project	Include/Exclude	Q/A List	Approval Notes	Contract Review
Bluebeam Studio Project Number: 800-882-828				
Customer Name: Max Company	<input type="button" value="Details"/>			
Contact: Max Max	<input type="button" value="Details"/>			
Primary Developer Name:	<input type="button" value="Details"/>			
Project Name: TestMax_19_3	<input type="button" value="Details"/>			
Project Description:				
	<div style="border: 1px solid green; padding: 5px; text-align: center;">Fill in the required field RFMS SL</div>			
	<div style="border: 1px solid black; padding: 5px; text-align: right;"> First Delivery Date: 10.07.2021 <input type="button" value="Edit"/> Project Type: Opportunity Stage: Closed Won Project Manager: K2Test5 Project Coordinator: K2Test3 Build GM %: 53.12 Flooring GM %: 34.68 Build Total: \$1,439,746.40 Flooring Total: \$777,864.33 Total Amount: \$2,217,610.73 RFMS JE Number: 123 RFMS SL Number: <input type="text" value="Type a value"/> </div>			

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

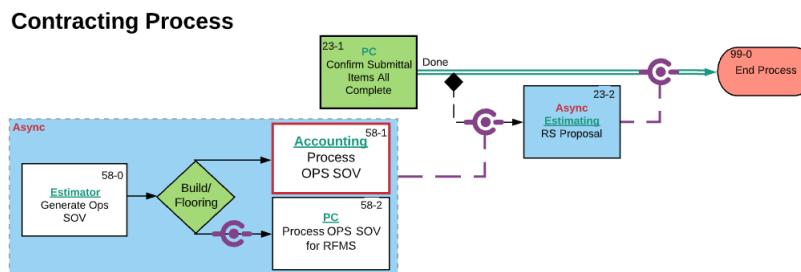
58-1 Process OPS SOV Step

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.

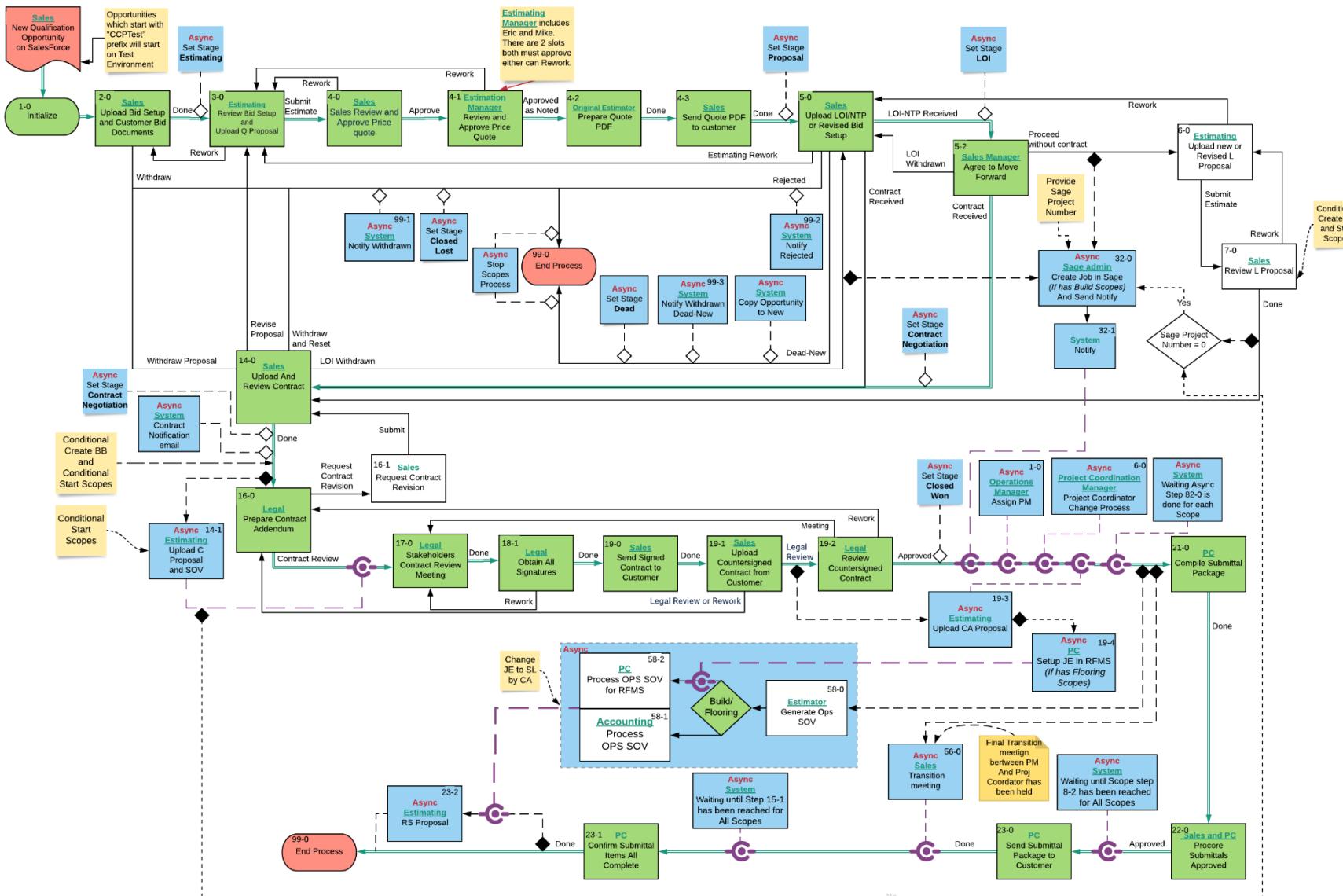


Screenshot - [Lucid Chart](#) – 58-1 Process OPS SOV – Contracting Process

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

Contracting Process



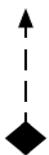
Designations on the diagram



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



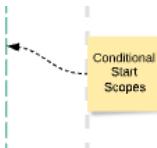
Indicates the transition of the project to the next stage.



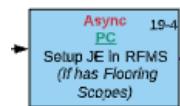
Means that after the step, an asynchronous step will be launched, which will block the further progress of the project.



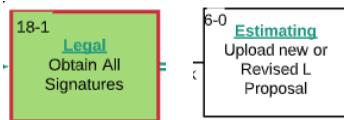
Asynchronous steps section



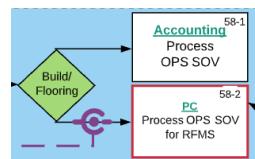
Note



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



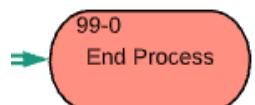
Shows the step of the main process, where the role of the recipient and the name of the step are registered. The red frame shows which step you are in.



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



Start Process



End Process