Starting a New Project on Your ConsensusDocs Dashboard

Your Dashboard provides a multi-level hierarchy that allows you to manage, separate, and organize: 1) multiple projects, 2) multiple negotiations within each project, 3) multiple contract documents within each negotiation, and 4) supporting documents. The Dashboard is accessible only by the project Originator, and Collaborators are invited individually and selectively to gain access to the negotiation documents as determined by the project Originator (in a separate Collaborators section of the website).

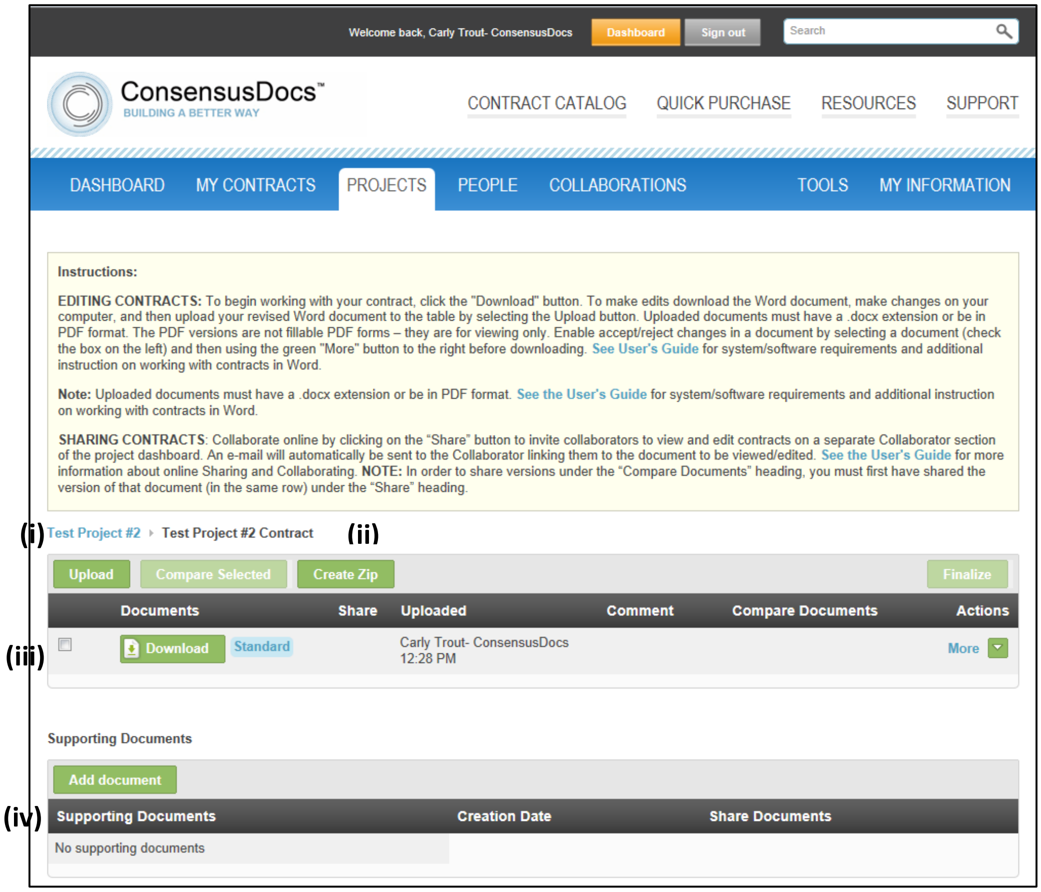
Be sure to drill down far enough in the Dashboard if you do not see the Contract document you are trying to open. The hierarchy works this way:

I. The Project Name level – manage multiple Projects within your Dashboard

II. Negotiation Name level – manage multiple negotiations under one project

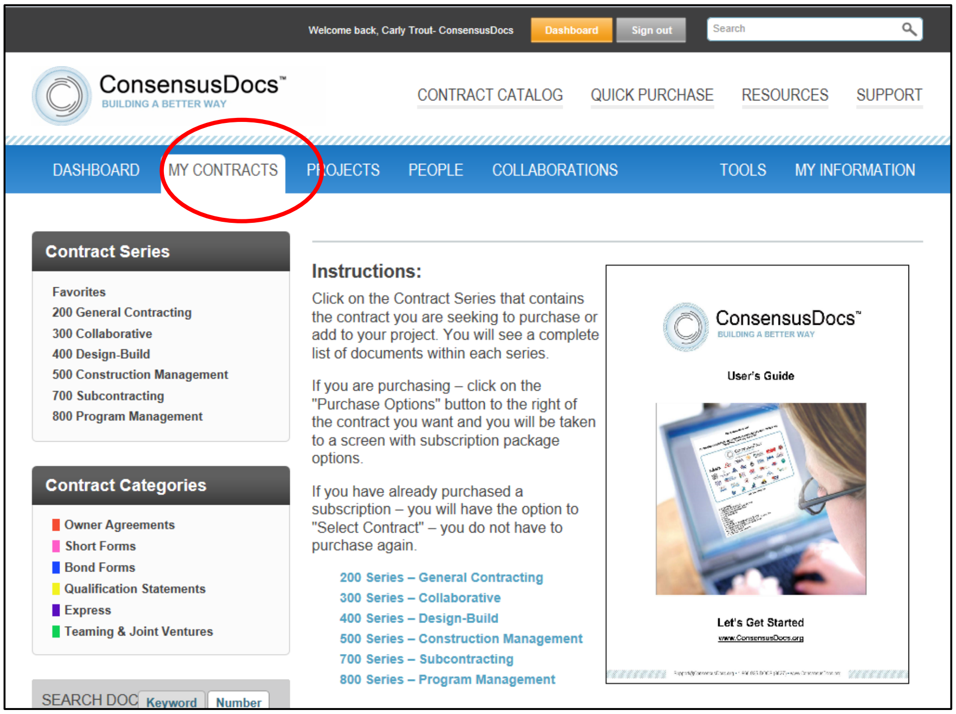
III. The Contract Document versions level – this will display the multiple versions of one contract negotiation under a specific project

IV. Supporting Documents

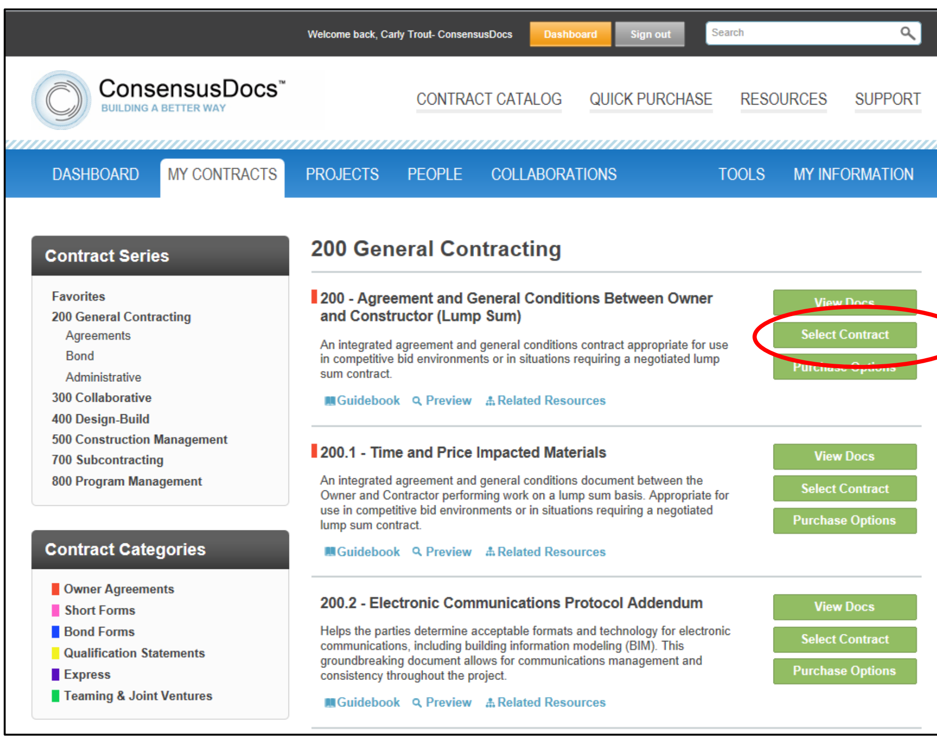


There are two ways to set up a new project on your Dashboard:

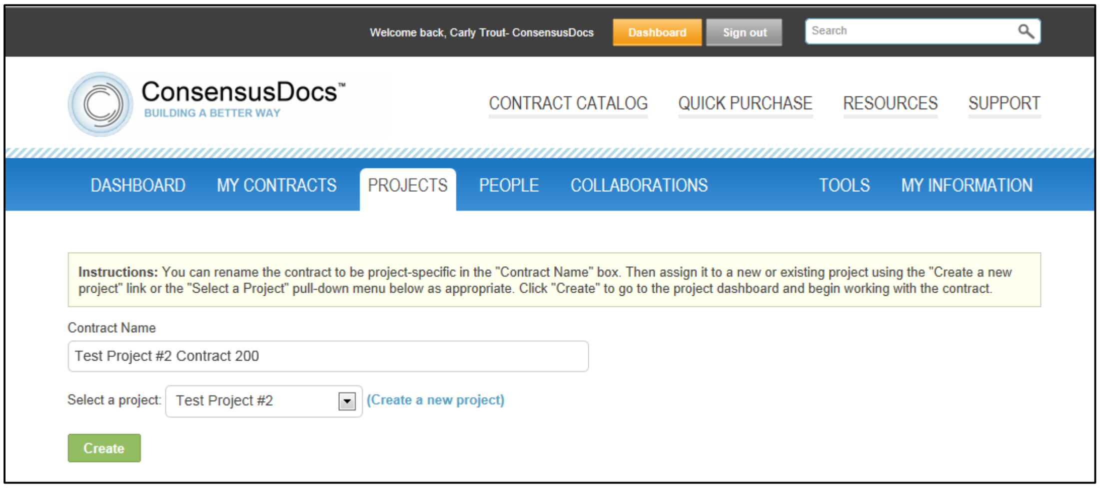
1. **From the My Contracts Tab:**
   - Go to the My Contracts Tab on your Dashboard and select a contract series



- Choose the green "Select Contract" button to the right of the document

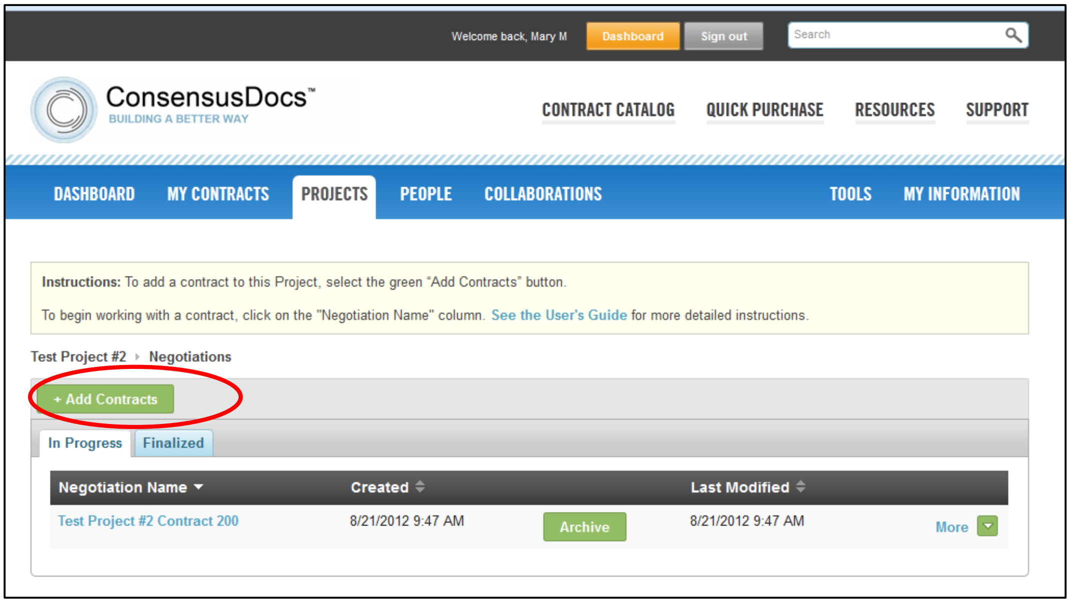


- You will be prompted to name your contract and select a project to put it in. You can choose an existing project or create a new project, then select the green Create button



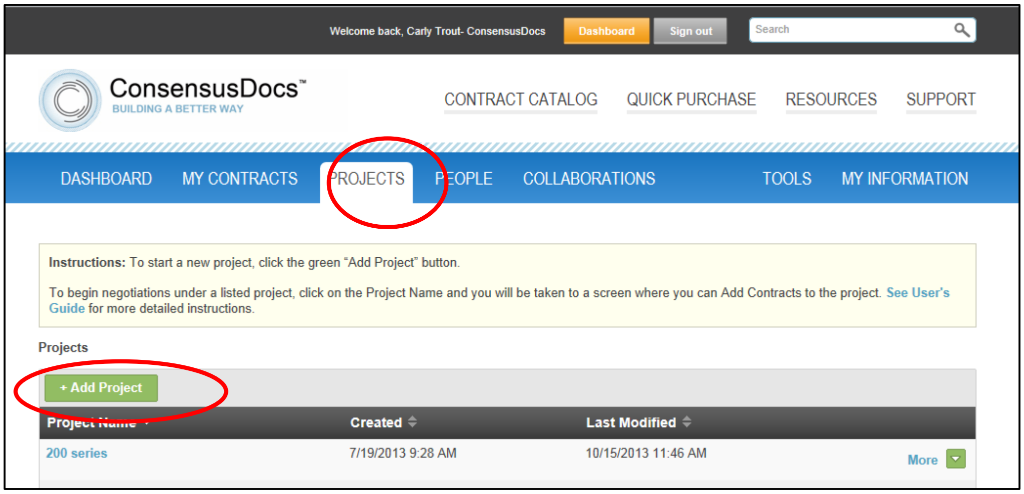
- You will then be taken to the project dashboard where you can access the contract just selected, by clicking on the Negotiation Name link in the table – this will take you to the Word or PDF version of the contract which can be downloaded to your computer to edit/share/print.

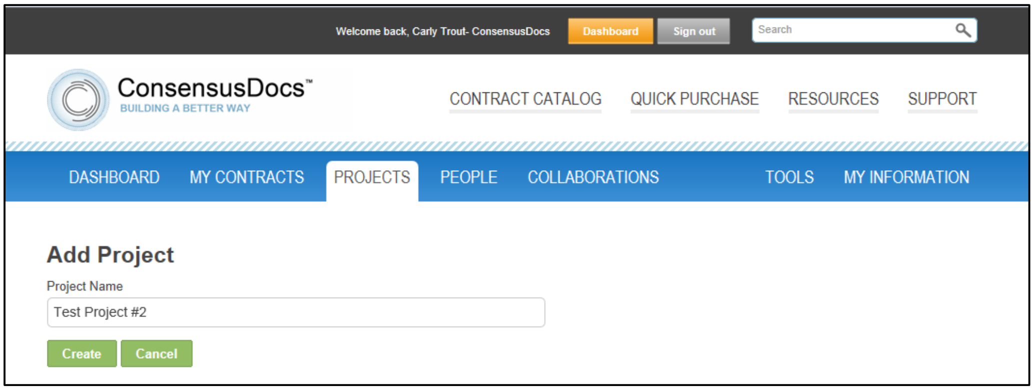
- You can also add other contracts to the project dashboard by selecting the green “Add Contracts” button above the Negotiation table.



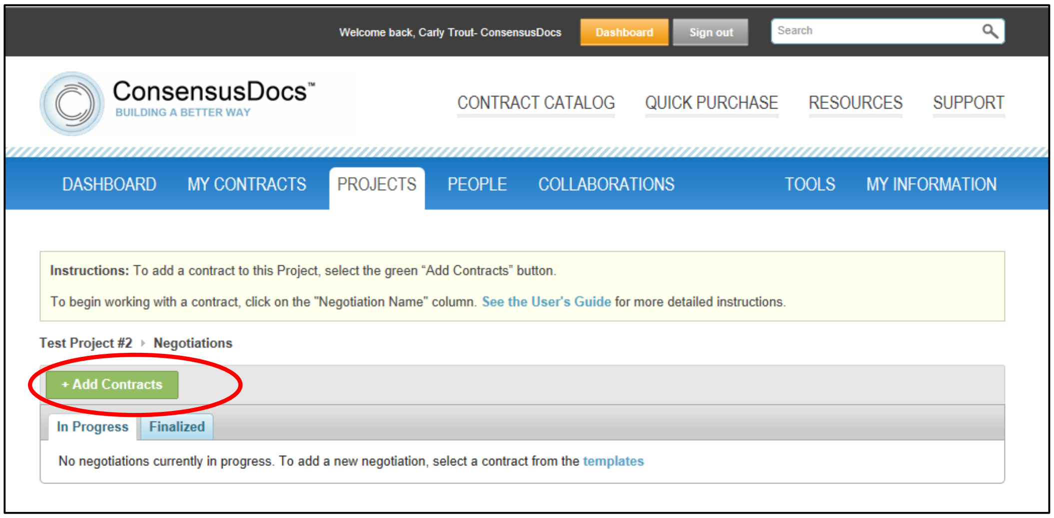
2. From the Projects Tab:

- If you create a Project from the Projects Tab before selecting the contract, you will see the Add Project screen where you will name your project and select the Create button to begin.





- Once you've created your project, you will be taken to that Project Dashboard where you can add contract negotiations to your dashboard.
- Select "Add contracts" – you will be taken to the My Contracts page. Select the contract you want to work with on the project.



- Once your contract is added, click on the Negotiation Name to access the Word or PDF contract that can be downloaded to your local computer for editing, printing, saving, and sharing.