

ConsensusDocs[®]
BUILDING A BETTER WAY

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

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Instructions:

EDITING CONTRACTS: To begin working with your contract, click the "Download" button. To make edits download the Word document, make changes on your computer, and then upload your revised Word document to the table by selecting the Upload button. Uploaded documents must have a .docx extension or be in PDF format. The PDF versions are not fillable PDF forms – they are for viewing only. Enable accept/reject changes in a document by selecting a document (check the box on the left) and then using the green "More" button to the right before downloading. [See User's Guide](#) for system/software requirements and additional instruction on working with contracts in Word.

Note: Uploaded documents must have a .docx extension or be in PDF format. [See the User's Guide](#) for system/software requirements and additional instruction on working with contracts in Word.

SHARING CONTRACTS: Collaborate online by clicking on the "Share" button to invite collaborators to view and edit contracts on a separate Collaborator section of the project dashboard. An e-mail will automatically be sent to the Collaborator linking them to the document to be viewed/edited. [See the User's Guide](#) for more information about online Sharing and Collaborating. **NOTE:** In order to share versions under the "Compare Documents" heading, you must first have shared the version of that document (in the same row) under the "Share" heading.

(i) [Test Project #2](#) > [Test Project #2 Contract](#) (ii)

[Upload](#) [Compare Selected](#) [Create Zip](#) [Finalize](#)

Documents	Share	Uploaded	Comment	Compare Documents	Actions
<input type="checkbox"/>	Download Standard	Carly Trout- ConsensusDocs 12:28 PM			More <input type="checkbox"/>

(iii)

Supporting Documents

[Add document](#)

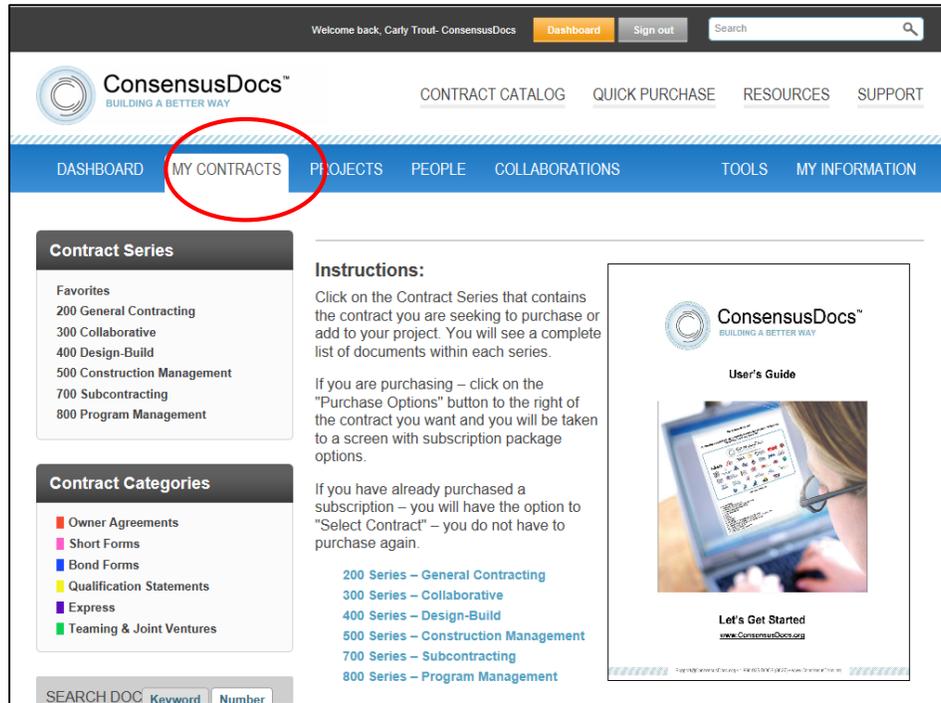
Supporting Documents	Creation Date	Share Documents
No supporting documents		

(iv)

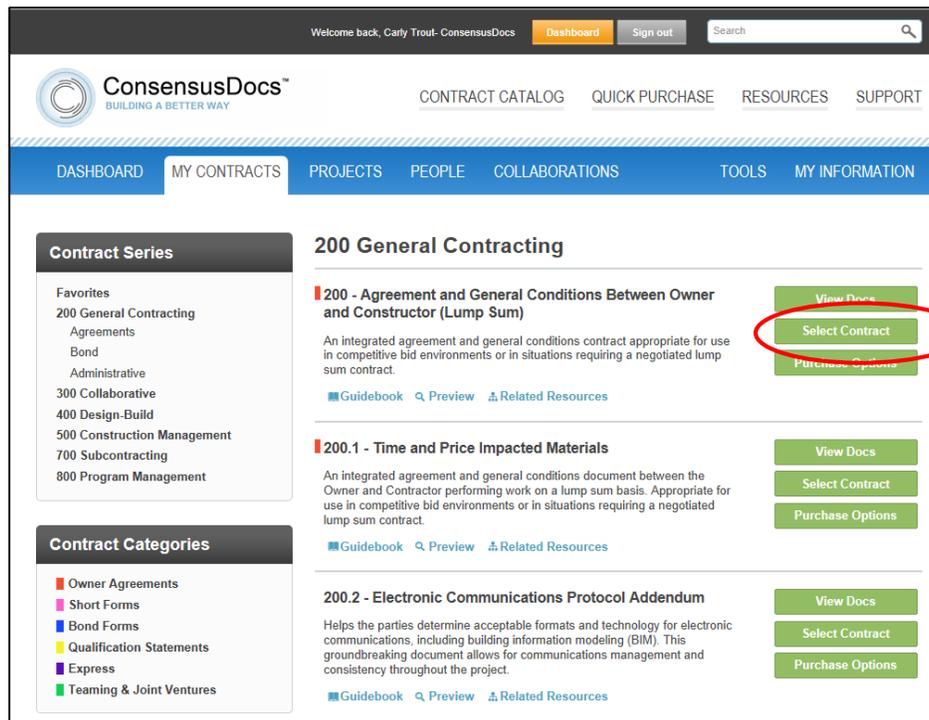
There are two ways to set up a new project on your Dashboard:

1. From the My Contracts Tab:

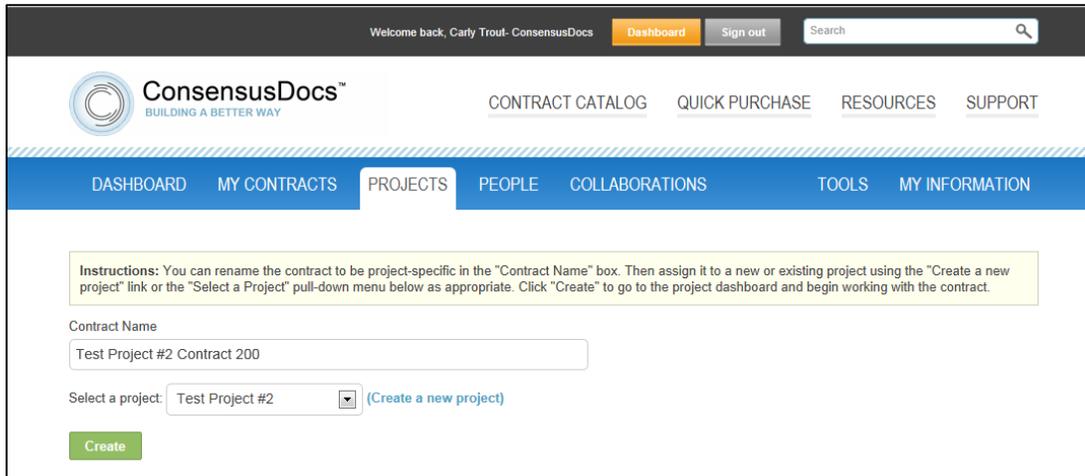
- Go to the My Contracts Tab on your Dashboard and select a contract series



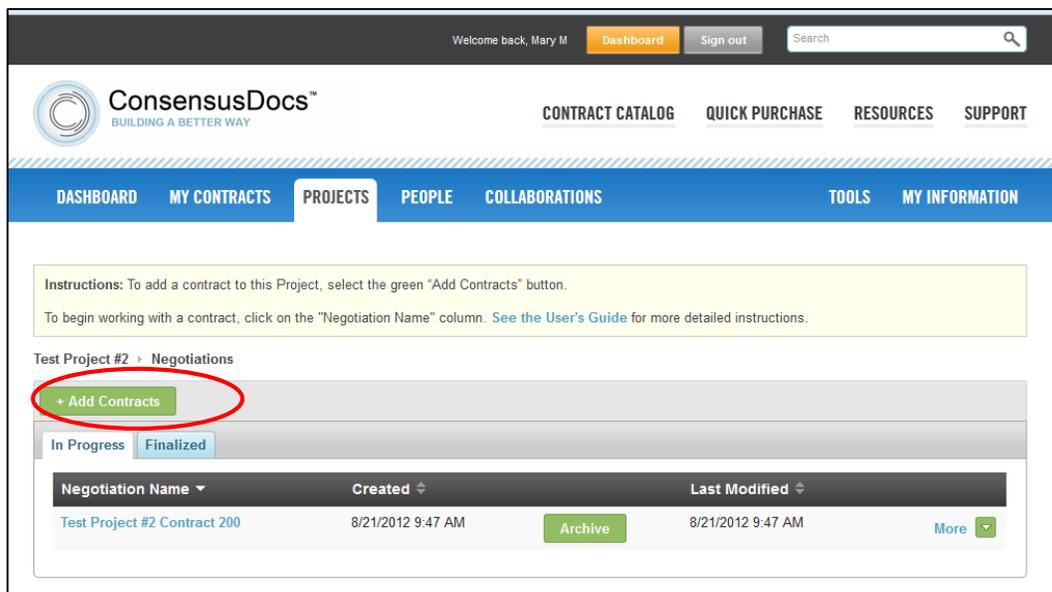
- Choose the green "Select Contract" button to the right of the document



- 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.

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Instructions: To start a new project, click the green "Add Project" button.
To begin negotiations under a listed project, click on the Project Name and you will be taken to a screen where you can Add Contracts to the project. [See User's Guide](#) for more detailed instructions.

Projects

+ Add Project

Project Name	Created	Last Modified	
200 series	7/19/2013 9:28 AM	10/15/2013 11:46 AM	More

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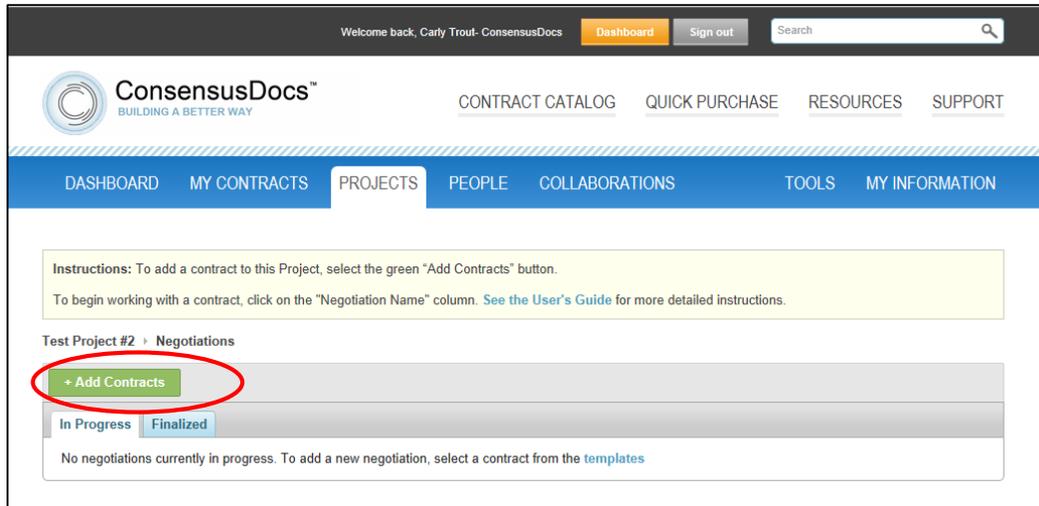
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Add Project

Project Name

[Create](#) [Cancel](#)

- 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.

