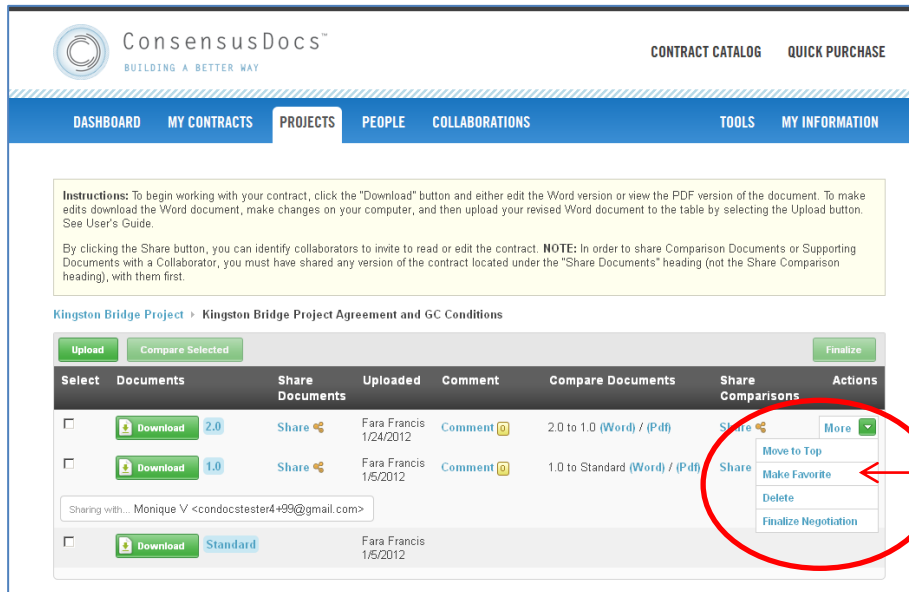


Making a Favorite or Master Template

- The Favorite tool allows users to save a Word version of a standard document that has been edited, has been uploaded back to the project Dashboard, and is in a format that the Originator feels will be useful on future projects.
- From the Projects tab, use the “More” pull down menu on the right of the edited “Version” of a contract and select “Make Favorite”.



The screenshot shows the ConsensusDocs interface. At the top, there's a navigation bar with 'DASHBOARD', 'MY CONTRACTS', 'PROJECTS', 'PEOPLE', 'COLLABORATIONS', 'TOOLS', and 'MY INFORMATION'. Below this is a table of documents for the 'Kingston Bridge Project'. The table has columns for 'Select', 'Documents', 'Share Documents', 'Uploaded', 'Comment', 'Compare Documents', 'Share Comparisons', and 'Actions'. A red circle highlights the 'More' dropdown menu for the first document, which includes options like 'Move to Top', 'Make Favorite', 'Delete', and 'Finalize Negotiation'. An arrow points to the 'Make Favorite' option.

- That version of the contract will be saved under the My Contracts tab in the Contract Series box under the “Favorites” link.
- Favorites can be used on any future project:
 - Click on the Projects Tab
 - Click on the green Add Project button, name the project and click on Create



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

Projects

+ Add Project

[In Progress](#) [Closed](#)

Project Name	Created	Last Modified	
Big Bridge Construction Project	10:16 AM	10:59 AM	More <input type="checkbox"/>

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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 Favorite you wish to work with from the Favorites link in the Contract Series box.



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Instructions: To add a contract to this Project, select the green "Add Contracts" button.
Once your contract has been added to the Project, click on the Contract Name that will be displayed in the area below to begin collaborations on this negotiation.
See [See User's Guide](#).

Big Bridge Construction Project > Negotiations

+ Add Contracts

[In Progress](#) [Finalized](#)

Negotiation Name	Created	Last Modified	
Tri-Party Agreement for Integrated Project Delivery	10:18 AM	10:18 AM	More

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Contract Series

- Favorites**
- 200 General Contracting
- 300 Collaborative
- 400 Design-Build
- 500 Construction Management
- 700 Subcontracting
- 800 Program Management

Favorites

Instructions: To save an edited contract as a favorite for use on future projects, return to the Projects tab, select the appropriate contract negotiation and using the green "More" button to the right of that selected contract, choose "Make Favorite".

Favorite Name	Creation Date
Tri-Party Agreement Favorite	4:27 PM

- You will then be brought to your new Project Dashboard where you will see the Standard contract which is automatically brought into the Project and a Version 1.0 which is the Favorite you selected to load into the Project Dashboard. You can begin your negotiation from the Version 1.0 favorite by selecting the green Download button next to the 1.0 and begin editing in MS Word.



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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.

[Test Project #2](#) > [Test Project #2 Contract 200](#)

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

	Documents	Share	Uploaded	Comment	Compare Documents	Actions
<input type="checkbox"/>	Download 1.0	Share	Mary M 11:18 AM	Comment	1.0 to Standard (Word) / (Pdf)	Share More
<input type="checkbox"/>	Download Standard		Mary M 9:47 AM			More