

ConsensusDocs Quick Start User Guide

www.ConsensusDocs.org



Quick Start User Guide

This Quick Start User Guide is intended to present typical actions that will be performed for collaborative project negotiations using the new ConsensusDocs technology platform.

Topics covered in this guide include:

- Registering
- Making a purchase
- Assigning a license(s)
- Setting up a project
- Adding a contract(s)
- Editing a contract(s)
- Finalizing a contract
- Collaborating and sharing a contract(s)
- Creating a Favorite
- Using a Favorite

More detailed instructions can be found in the User’s Guide at www.ConsensusDocs.org.

Let’s get started!

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1. Register and Sign In ([Home page](#))

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LOGIN

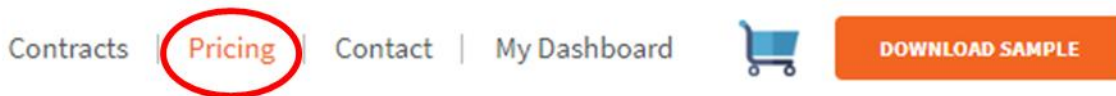


- **1st Time-Users** — Do not sign in; instead click on "[Get Started](#)" and complete the accompanying form.
- **Registered Users** — If you have registered in the past, click on "[Login](#)" at the top of the page. Enter your credentials and click the orange "Log In" button.

2. Make a Purchase ([Pricing page](#))

****Required Actions: Log In (Section 1)**

- Register for an account first (1) or log in if you already have an account.
- Select "[Pricing](#)" at the top of the page.



- From the [Pricing page](#), select the subscription package you want.

Full Package (Unlimited) MOST POPULAR All Access To All Documents Unlimited use of all documents for one full year	\$ 1,199 Retail \$ 949.00 Member** MORE INFO →	Total Docs Included: 107 Total Docs Not Included: 0 GET UNLIMITED PACKAGE
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Owner Package	Design Builder Package	Subcontracting Package	Design Professional Package
\$ 1,099.00 Retail \$ 879.00 Member**	\$ 949.00 Retail \$ 749.00 Member**	\$ 749.00 Retail \$ 599.00 Member**	\$ 659.00 Retail \$ 529.00 Member**
Two full series (300 and 900) Total Docs Included: 26 Total Docs Not Included: 81	No full series; Four series with none (300, 500, 800 and 900) Total Docs Included: 38 Total Docs Not Included: 69	Two full series (700 and 900); One series with none (500) Total Docs Included: 47 Total Docs Not Included: 60	One full series (300); Two series with none (500 and 900) Total Docs Included: 39 Total Docs Not Included: 68
MORE INFO GET PACKAGE	MORE INFO GET PACKAGE	MORE INFO GET PACKAGE	MORE INFO GET PACKAGE

- Complete the order form.
 - *Note:* If you have a coalition discount code enter it in the Coupon Code box.
- Verify all the information before clicking the green "Purchase" button.
- A receipt will be e-mailed to you.

After the purchase, you will be linked to your "My Subscriptions" page where you need to assign the subscription to yourself or another user.

3. Assign License(s) ([My Subscriptions page](#))

****Required Actions:** Log In (Section 1) and Make a Purchase (Section 2)

After any new purchase or renewal, **you must assign the subscription license(s) to yourself and/or authorized users, before gaining access to the contracts.** You will assign all licenses (including your own) through the “My Subscriptions” page.

- If you are not already, [log in](#). Select “My Subscriptions” on the right side (if you are not already on that page).
- Click the check box to the left of the subscription license to be assigned, enter the name and e-mail address of the user, and click the blue “Send” button.
- If you assigned the license to someone else, they will get an email notification. You can monitor if that person has logged in to accept the subscription or not on the “[My Subscriptions](#)” page.

Once you have assigned a subscription to yourself or another user, you can begin to use the contracts in your subscription.

4. Set up a Project ([My Projects page](#))

****Required Actions:** Log In (1), Make a Purchase (2) and Assign a License (3)

- If setting up a new project – go to the [My Projects page](#), enter the desired project name and click the green “Create New Project” button.
- You will then be taken to the contract management section of your newly created project. See section 5 on how to add a contract(s) to your project.

5. Add a Contract

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3) and Set up a Project (4)

- If working from an already existing project - go to the [My Projects page](#), click on “View Project Details” on the name of the project you want to access.
- Click on the “Add Contracts” Or “Add Contracts from Favorites” button - if you have already created a favorite (Section 12).

My First Project

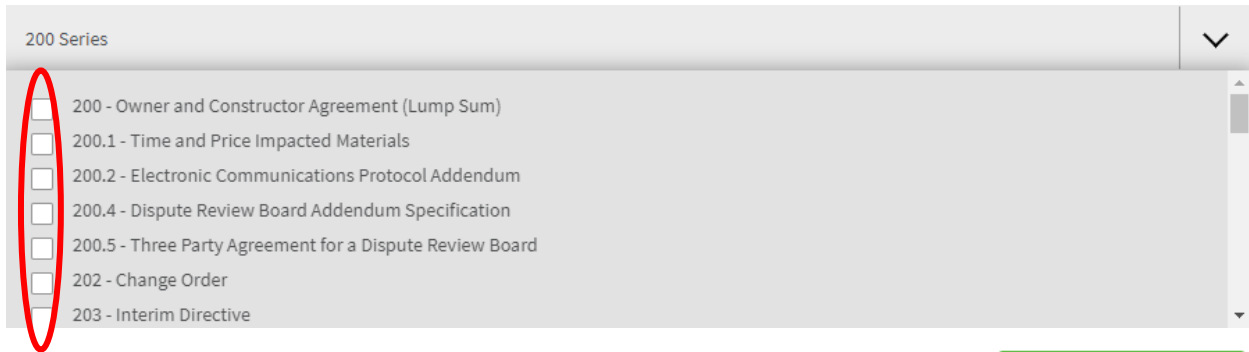
RENAME PROJECT	DELETE PROJECT	DOWNLOAD ALL CONTRACTS
ADD CONTRACTS	ADD CONTRACTS FROM FAVORITES	MANAGE PROJECT COLLABORATORS

- From the dropdown menus that appear, find the contract series of the contract that you are looking for. Click the down arrow located to the right of the series name.

200 Series



- Select the check box of the name of the document or multiple documents.
 - *Note:* More than one contract can be added to a project at a time.



You have selected 0 out of 107 contracts



- Click “Add Contracts.”
- You will be taken to your Project page where you can edit a contract (Section 6) and begin collaborations (Sections 8, 9 and 10).

6. Edit Contracts ([My Projects page](#) or [My Collaborations page](#))

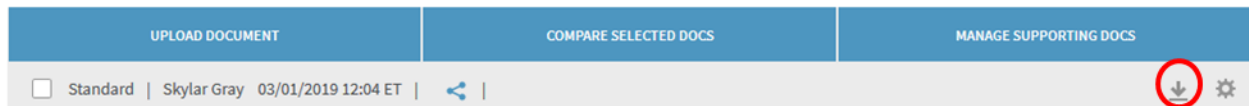
****Required Steps:** *Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (Section 4) and Add a Contract (Section 5)*

Follow the below steps to modify a standard contract, or any version of a document.

- From the [My Projects page](#) (or [My Collaborations page](#) if you were invited to collaborate on a document) click the Project Name then select the orange arrow to the left of the contract name.



- Click on the “Download” arrow to the right of the contract name, or left of the “Wheel” icon, to download the contract to your computer for editing.



- Open the downloaded contract on your computer, edit, save to your hard drive, and close.
 - *Note:* Editable sections are shaded in yellow beginning on the first page of the contract following the instructions page.

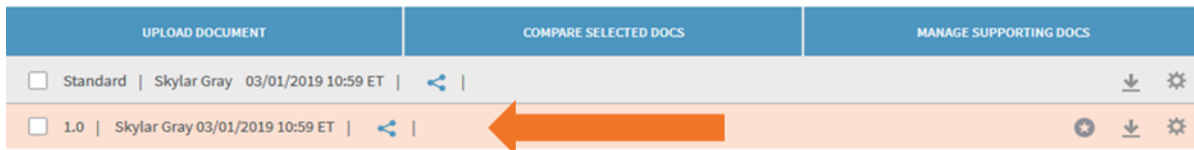
- Once you are done editing the document, you will need to upload it back into the system to share or finalize. From your [My Projects page](#), select the Project and the Contract, then click “Upload Document.”



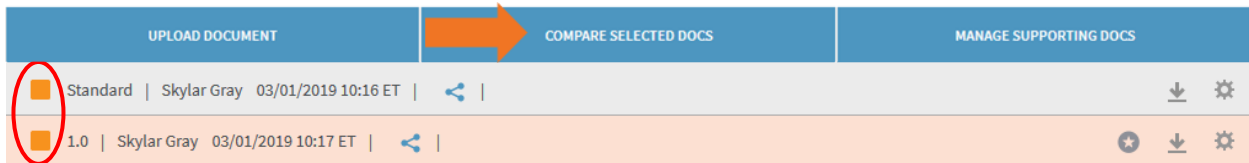
- *Note:* If you don’t see the “Upload Document” button, click the orange arrow to the left of the contract name.



- Select “Browse,” find the document you saved on your hard drive and click “Upload.”
- The revised contract will show on your Project page under the Contract name. See section 8 if you want to Collaborate on a contract.



- *Note 1:* To compare with the standard or the previous version of a contract, select the check boxes to the left of the two contract versions and click the blue “Compare Selected Docs” button.



- *Note 2:* If you were invited to Collaborate on a document, an automatic e-mail will be sent to the person who sent you the document to collaborate on notifying them that an edited contract was added to the Project.
- *Note 3:* If you were the originator of the document and sent it to someone to collaborate on, you can “Enable Accept/Reject Changes” by opening the “Wheel” icon on the right side of a contract name and selecting the orange “Enable Accept/Reject” button in the dropdown menu before downloading the contract to see a redline version of the contract. See User Guide for more details.
- *Note 4:* To create a clean copy of the contract, while in Word, go to the Review Tab, Track Changes section, click on “No Markup” in the top pull down menu, Save, Upload to the Dashboard. This process is similar to accepting all changes – only it is not permanent. To return to the redline version select “All Markup” from the dropdown in the Review Tab of Word.

7. Finalize a Contract ([My Projects page](#))

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4) and Add a Contract (Section 5)

Finalizing will accept all redline changes, remove the “DRAFT” watermark and insert a unique Content Security ID code into the footer. This is usually done after you Collaborate (Sections 8, 9 and 10) on a document.

- From the specific Project page, click the “Wheel” icon located to the right of the contract version that you want to Finalize.
- Select the green “Finalize Document” button.



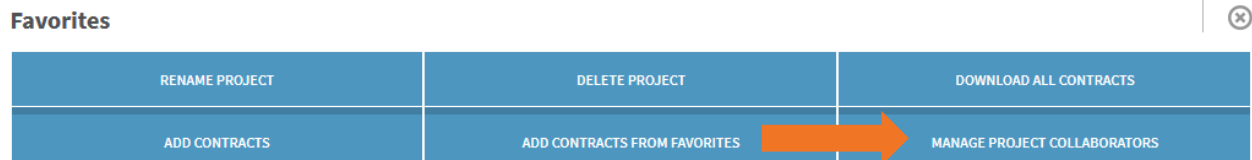
- Note: After Finalizing, you can still edit the Word version of the document that was used for Finalization and “re-finalize” that new version. See User Guide for more details on how to un-finalize a document.



8. Share Contracts and Collaborate at the Project Level ([My Projects page](#))

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4) and Add a Contract (Section 5)

- From the [My Projects page](#) select the project that you are working on.
- On the specific Project page click the “Wheel” icon located to the far right of the Project name.
- Select the blue “Manage Project Collaborators” button.



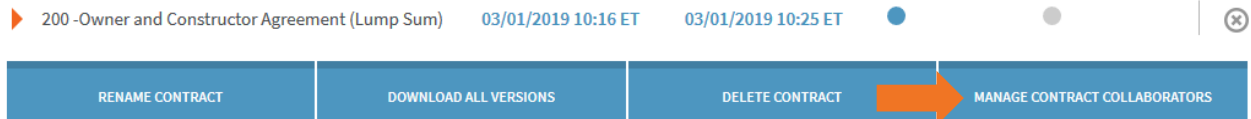
- Enter Collaborator name(s) and email address(es).
- Click the green “Invite to Collaborate” button - an e-mail will automatically be sent to the invited Collaborator(s) with a link to the project to review and edit.
 - Note: The level of collaboration is displayed to the right of the collaborator’s email address for the Originator’s reference.



9. Share Contracts and Collaborate at the Contract Level ([My Projects page](#))

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4) and Add a Contract (Section 5)

- From the specific Project page, find the contract you are working on.
- Click the “Wheel” icon to the right of the contract name. From the dropdown menu click the blue “Manage Collaborators” button.



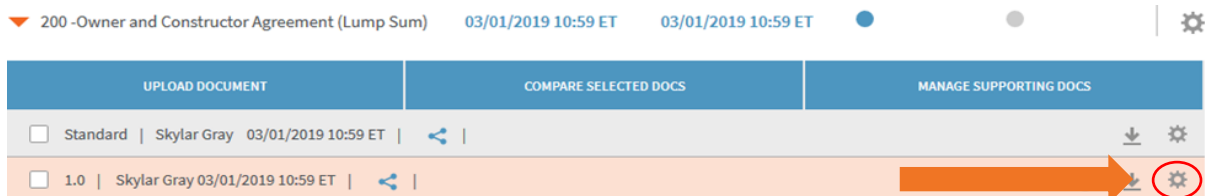
- Enter Collaborator name(s) and email address(es).
- Select whether you wish to share an editable Word or read only PDFs documents.
- Click the green “Invite to Collaborate” button - an e-mail will automatically be sent to the invited Collaborator(s) with a link to the document for editing.
 - Note: The level of collaboration is displayed to the right of the collaborator’s email address for the Originator’s reference.



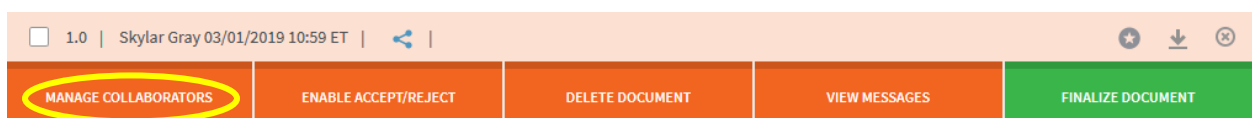
10. Share Contracts and Collaborate at the Version Level ([My Projects page](#))

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4) and Add a Contract (Section 5)

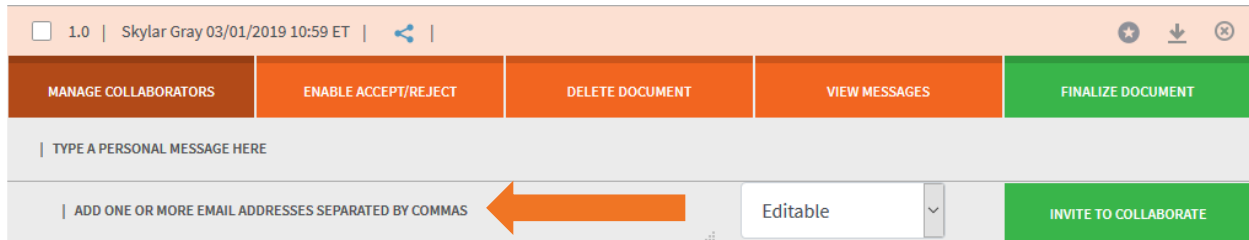
- From the specific Project page, find the contract you are working on.
- Click the orange arrow located to the left of the contract name.
- Find the contract version that you wish to collaborate on.
- Click the “Wheel” icon located to the far right of the contract version name.



- Select the orange “Manage Collaborators” button.



- Enter Collaborator name(s) and email address(es).
- Select whether you wish to share an editable Word or read only PDF document.
- Click the green “Invite to Collaborate” button - an e-mail will automatically be sent to the invited Collaborator(s) with a link to the document for editing.
 - *Note 1:* The level of collaboration is displayed to the right of the collaborator’s email address for the Originator’s reference.
 - *Note 2:* The Compare Document version can be shared after the edited document version has been shared.



11. Invited to Collaborate

If you received an e-mail from a ConsensusDocs subscriber to collaborate on a contract, you will follow the below steps to review it. The *Editing Contracts* (6) section might be helpful to review.

- From the [My Collaborations page](#), select the Contract Name, download the negotiation by clicking on the download arrow to the right of the negotiation name, edit, and save to your hard drive.
- On the [My Collaborations page](#), select “Upload Document”.
- An e-mail will automatically be sent to the Originator that an edited contract has been uploaded.

Comments can be made and read on the “My Collaborations” page. All comments will be viewable by all Collaborators within that negotiation step/version, contract or project.

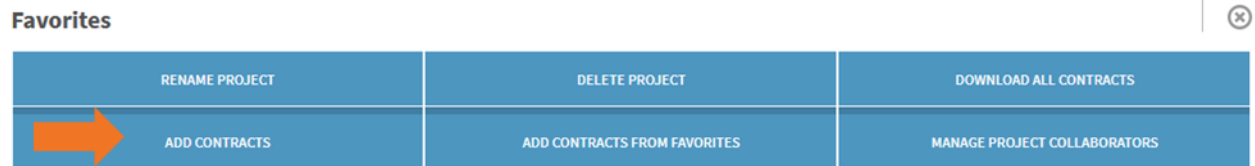
12. Make a “Favorite” ([My Projects page](#))

*****Required Steps:*** *Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4), Add a Contract (Section 5) and Edit a Contract (Section 6)*

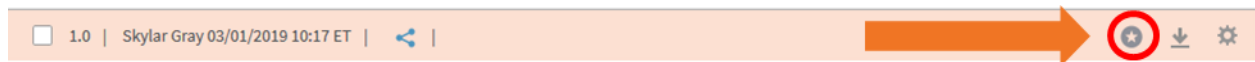
The “Favorite” tool allows users to save a Word version of a standard document that has been negotiated and/or edited in a format that is useful on future projects. Follow the below steps to save an edited version of a contract so that you do not have to start from scratch on your next project.

- *Note:* For housekeeping purposes, we advise creating a project and naming it “Favorites” to help keep things organized.

- Once you are in your “Favorites” project, click the “Wheel” icon located to the right of the Project name.
- Select the blue “Add Contracts” button to add the applicable contract.
- After the contract is added, download it and make any desired changes. Save this document to your hard drive (be thoughtful on the name that you save it under as that is the name that will be referenced in the system).
- Navigate back to the ConsensusDocs platform and your “Favorites” project.
- Click the blue “Upload Document” button. Drag and drop or click Browse to select the edited document that you wish to upload and make a “Favorite.”



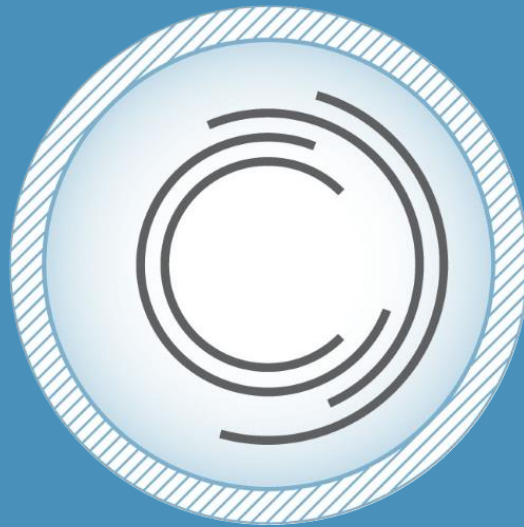
- Find the row of the document that you just uploaded. Click the star icon located at the right end of the row to make it a “Favorite.”



13. Use a “Favorite” ([My Projects page](#))

****Required Steps:** Log In (Section 1), Make a Purchase (Section 2), Assign a License (Section 3), Set up a Project (4), Add a Contract (Section 5), Edit a Contract (Section 6) and Make a “Favorite” (Section 12)

- Navigate to the [My Projects page](#) and select a project.
- Click the “Wheel” icon located to right of the project name.
- Select “Add Contracts from Favorites.”
- Find the contract name that you previously made a “Favorite.”
- Search for the contract that you just added using the search bar located at the top of the page.



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