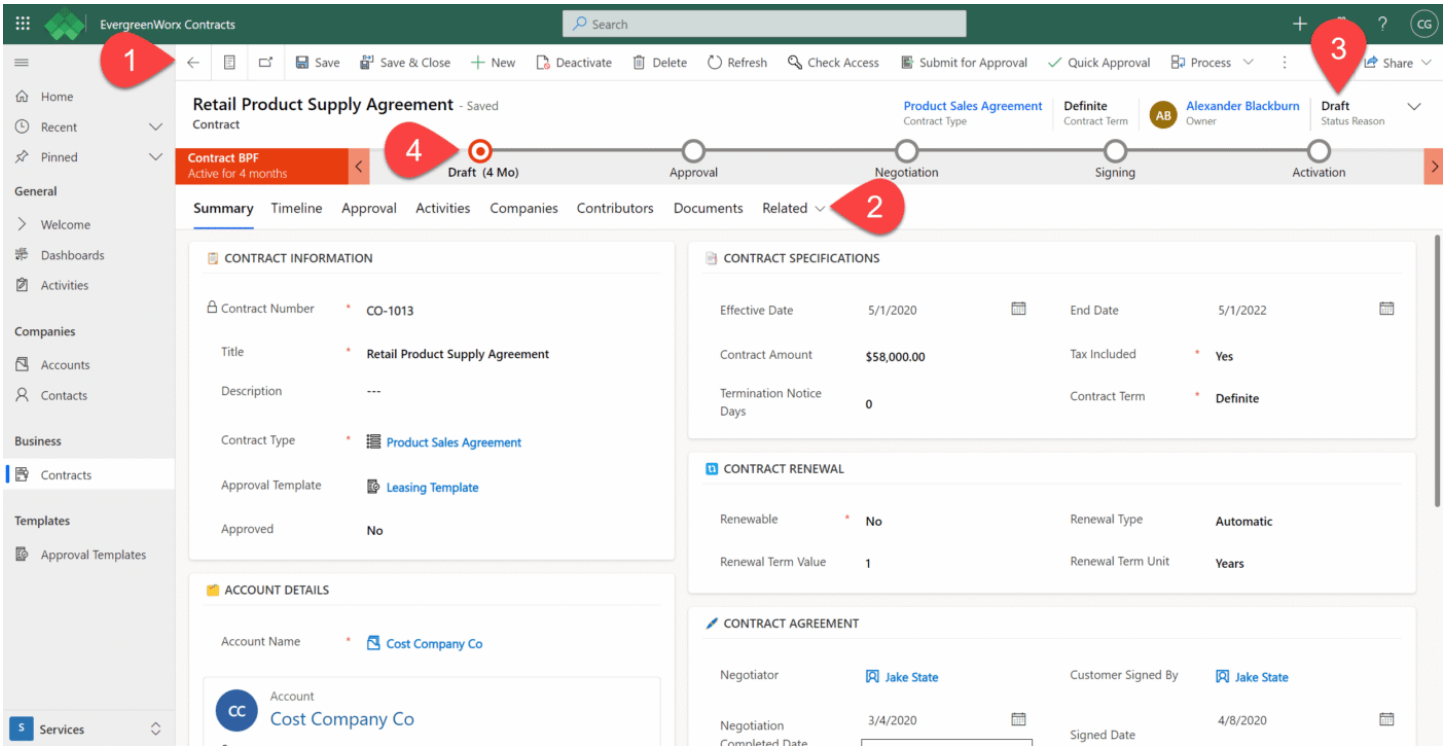
Contracts

https://evergreenworx.com/docs/contracts/

The main Contract record form is where all key data about a particular Contract is kept, including the following: Contract Type, Company, Primary Contact, Effective Date, Termination date, etc.



In the ribbon, available actions are displayed for the current Contract record, such as deactivating the record, deleting the record, running a report, or submitting for approval. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Contract record, you'll see the following tabs:

- Summary – Displays contract details and terms data.
- Timeline – Displays the Contract's history such as the record's creation, modification, Notes, Activities, and more. For more information, see Timeline | EvergreenWorx.
- Approval – Displays any procedural steps that are needed for a Contract to be approved, as well as the approval status and relevant dates.

- Activities – Displays various communications associated with the establishment or management of the Contract. For more information, see Activities | EvergreenWorx.
- Companies – Displays Accounts that are parties associated with the Contract. New Companies for this Contract can be created from this grid using the **+ *New Contract Company***
- Contributors – Displays Contacts that contribute in some way with the Contract. New Contributors for this Contract can be created from this grid using the **+ *New Contract Contributors***
- Documents – File attachments such as working drafts, completed documents, photos, etc.
- Related – Any other related items such Record Audit History.

3 Status of the record shows whether this Contract is in draft mode, is currently active, or is closed.

4 Business Process Flow of the record shows the specific stages of a Contract's development before becoming an active Contract. These include Draft, Negotiation, Signing and the final stage, Activation.