Creating Your First Contract

Contracts User Guide · https://evergreenworx.com/docs/creating-your-first-contract/

This article walks you through creating a new contract record in EvergreenWorx Contracts. Contracts in the system are structured to support the full contract lifecycle, including specifications, renewal options, agreement tracking, and status-based workflows.

Accessing the Contract Form

1. Navigate to **Contracts** from the left-hand sitemap.
2. Click **+ New** to open the contract creation form.

The contract form is divided into several sections to help you capture relevant information.

Required Fields

To save a new contract, the following fields are required:

- **Title**: The name or label of the contract.
- **Account Name**: The customer or vendor organization associated with the contract.
- **Contract Type**: Select from a predefined list of contract classifications such as Fixed-Price, NDA, or Subcontract.

In addition to the above required fields, the following fields are marked as required but have default values already set:

- **Tax Included**: Defaults to "Yes". Indicates whether the contract amount includes taxes.
- **Renewable**: Defaults to "No". Determines if the contract supports a renewal process.
- **Contract Term**: Defaults to "Definite". Specifies whether the contract has a defined start and end date or is open-ended.

These defaults allow you to save the contract without immediately updating those values, though they can be changed if needed.

Key Sections of the Form

Contract Information

Capture high-level details:

- Title
- Account and Contact Names
- Contract Type
- Substatus (automatically assigned based on lifecycle logic)
- Tags (for categorization or filtering)

Contract Specifications

Define the financial and date-related aspects:

- Effective Date and End Date
- Currency
- Contract Amount
- Termination and Cancellation notice settings

Contract Renewal

If the contract is renewable:

- Define the renewal type, term value, and term unit

Contract Agreement

Track the people and timeline involved in negotiation:

- Negotiator
- Negotiation Completed Date
- Customer Signed By and Signed Date

Saving and Continuing

Once the required fields are populated, click **Save** or **Save & Close**.

The contract will start in the **Draft** system status with an assigned substatus. You can then begin attaching documents, initiating workflows, or sending for approval based on your organization’s process.

Best Practices

- Use clear, descriptive titles to help with searching and reporting.
- Set the correct Contract Type to ensure workflows and templates behave as expected.
- Enter key dates and amounts early to take advantage of lifecycle automation and expiration tracking.

Creating a well-defined contract record at the beginning of the process ensures the rest of the contract lifecycle is handled smoothly and consistently.