Managing Contract Contributors

Contracts User Guide · https://evergreenworx.com/docs/managing-contract-contributors/

The **Contract Contributors** feature in EvergreenWorx Contracts allows you to associate internal users and external contacts with a contract record. Contributors represent people who are involved in the contract process, whether for collaboration, oversight, review, or operational purposes.

While similar in purpose to Contract Companies, Contributors focus specifically on **people**, rather than organizations.

When to Use Contract Contributors

Use Contract Contributors to:

- Identify internal users who are helping to draft, review, or execute a contract.
- Associate external individuals (such as vendor contacts or client stakeholders) who play an important role but are not official signers.
- Track roles and responsibilities during the contract lifecycle.

Fields on the Contract Contributor Record

Each Contract Contributor record includes the following fields:

- **Name**: A short description of the person’s role in the contract (e.g., "Legal Reviewer", "Client Representative").
- **Relationship Type**: A choice field that defines the nature of the contributor’s involvement (e.g., Reviewer, Collaborator, Observer).
- **User**: A lookup to a system user in your environment. Use this for internal team members.
- **Contact**: A lookup to a Contact record. Use this for external contributors.

> **Note**: Only **one of the fields — User or Contact — is required**. If you populate one, the other becomes optional. You do not need to fill out both.

Adding a Contract Contributor

1. Open the relevant contract record.
2. From the tabs select **Contributors**.
3. Click **+ New Contract Contributor**.
4. Enter a descriptive Name.
5. Select a Relationship Type.
6. Populate either the User **or** Contact field.
7. Save the record.

You can add as many contributors as needed to reflect the complexity and collaboration behind each contract.

Benefits of Using Contract Contributors

- Establishes clear accountability for contract tasks or stages.
- Enhances visibility into who is involved in the contract lifecycle.
- Supports advanced filtering, reporting, and task routing.
- Allows external participants to be linked without making them system users.

Best Practices

- Use standardized naming for the Name field to help with reporting and consistency.
- Ensure each key stakeholder or participant is added to help with collaboration and audit readiness.

- Use Relationship Type values to group contributors by function (e.g., Legal, Financial, Operational).

Contract Contributors give your team the flexibility to define and track who is involved in the contract process—internally and externally—supporting transparency, coordination, and lifecycle governance.