Managing Contract Documents

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

EvergreenWorx Contracts provides a seamless and powerful document management experience by leveraging the **native SharePoint integration** built into Microsoft Power Platform model-driven apps. This integration allows you to securely store, organize, and collaborate on contract-related documents without leaving the EvergreenWorx interface.

This article provides an overview of how document management works within EvergreenWorx Contracts, how to access it, and best practices for staying organized throughout the contract lifecycle.

How SharePoint Integration Works

When SharePoint is enabled for your environment, each **Contract** record in EvergreenWorx is automatically linked to a corresponding **SharePoint folder**. This folder acts as the central location for storing all documents related to that specific contract.

This integration supports:

- Automatic folder creation upon contract record creation
- Uploading and downloading documents directly from the Contracts form
- Native support for co-authoring via SharePoint Online
- Security based on Dataverse roles and SharePoint permissions

Accessing Documents for a Contract

To access documents associated with a contract:

1. Open the desired contract record.

2. From the tabs, select **Documents**.
3. The embedded SharePoint document grid will display all files stored in the linked SharePoint folder.

From here, you can:

- Upload new files
- Open documents in Word, Excel, or PowerPoint online
- Download, delete, or rename files
- **Open the document location in SharePoint** to access full SharePoint features such as version history, document metadata, and permissions settings

Use Cases and Scenarios

Common types of documents you might manage include:

- Signed agreements and eSignature packets
- Contract drafts, templates, and redlines
- Related correspondence, like emails or memos
- Schedules, exhibits, and supporting financials

Because documents are stored in SharePoint, you can also:

- Enable retention policies and compliance labeling
- Integrate document flows using Power Automate
- Access documents from Microsoft Teams or the SharePoint web interface

EvergreenWorx Contracts Best Practices

- **Store all versions**: Use versioning and naming conventions to track redlines and revisions.

- **Use folders or naming prefixes**: For long-running or complex contracts, organizing documents by phase (e.g., Drafts, Signed, Amendments) can reduce clutter.
- **Security inheritance**: By default, SharePoint folders inherit security from Dataverse roles. For sensitive contracts, consider using SharePoint permissions directly.
- **Signed packet retention**: When using eSignature integrations (DocuSign or AdobeSign), ensure the signed contract packet is saved into this folder for audit and compliance.

Summary

EvergreenWorx Contracts takes full advantage of Microsoft’s robust document management platform. With out-of-the-box SharePoint integration, your team can stay productive, secure, and compliant while managing contract documentation directly within your contract workflows.

For more advanced scenarios, such as metadata tagging, automated filing structures, or document approval flows, speak to your EvergreenWorx administrator or implementation consultant.