New Contract Record

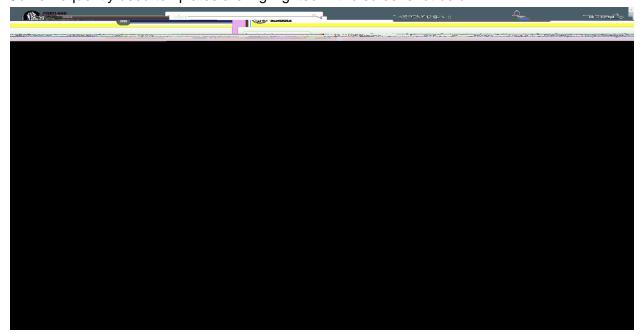
To create a contract in Cobblestone go to the Contracts drop down at the top of the screen. Select Add Contract Record

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Select the type of contract you want to create.

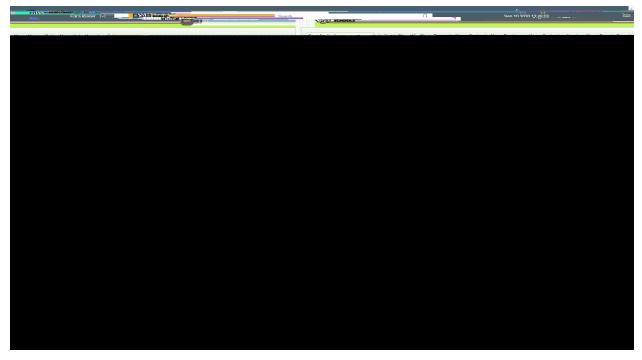
Click continue

Some frequently used templates are highlighted in the screenshot below.



On the Add New Contract Record page, complete all fields with the red asterisks.

Click 'save and continue'



Contracts Details

Check all information for correctness

Using Document Templates

In the contract record, scroll down to the **Merged Document Templates** section and click the "Merge Standard Template" button:

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The Document Process Manager page will

For amendments, you must select the appropriate amendment in the Amendment and Amendment Amounts subtables. So, if you are creating a new Amendment 6, be sure to click the box next to Amendment 6 in the two amendment subtables. This will ensure that the correct amendment information is pre-filled.

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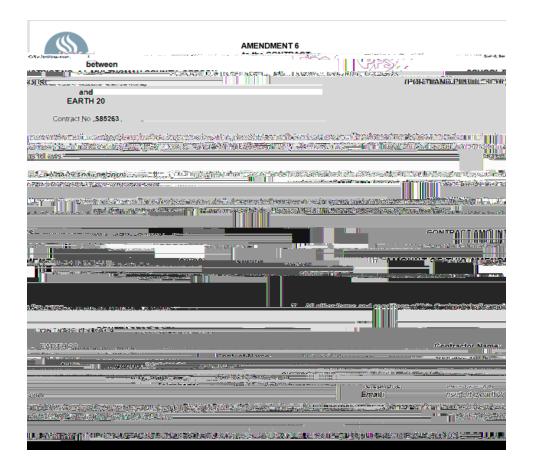
Click "Save and Continue"

On the Document Process Manager page, click the arrow next to the template you created to expand the menu.

The linked template will appear. Click the link to access the document.

Clicking on the linked document will download a template pre-downloaownloaow

Click through to complete any fillable sections.



When you are done, save the document on your computer. To save the unsigned draft with the contract record in Cobblestone, return to the contract record (click "Return to Record Details" from the Document Process Manager page), scroll down to **Files/Attachments**, add a file note (e.g., "Draft contract") and drag and drop your saved document to the "Drop Files Here" section.

Upload Documents to Record

Upload the Contract Approval Form ("CAF"), Contract template and any other documents needing review from Purchasing & Contracting

Please ensure the file naming convention is simple (for example, "CAF" or "Contract" or "Email approval")



These two areas show upload is successfully completed



Submitting Contract for Purchasing & Contracting Review and Approval

Do not submit your contract for Purchasing & Contracting review until you have obtained the Budget Holder's signature on the Contract Approval Form and the contractor's signature on the Contract. Be sure to upload the signed copies to the Contract Record in Cobblestone.

When ready for submittal, scroll down the page until you see the **Tasks**, **E-mails**, **Workflow**, **Alerts** section

Scroll to the right to and select Approve if all the information looks correct and all signed documents are uploaded

Once you have approved the task, you will see that it has been n o w

You can check the status of your contracts on your dashboard under the **My Pending Contracts** drop down



If you forget to include information or attach your signed CAF or Contract before submittal, the Contracts Team will reject your new contract submittal. You will receive an email notification and a new task ("Contracts Team Rejected") on your dashboard. Click on "View Contract" from your dashboard and complete the record as requested. When finished, "Approve" your task in the **Tasks, E-mails, Workflow, Alerts** section to submit the contract record back to the Contracts Team.