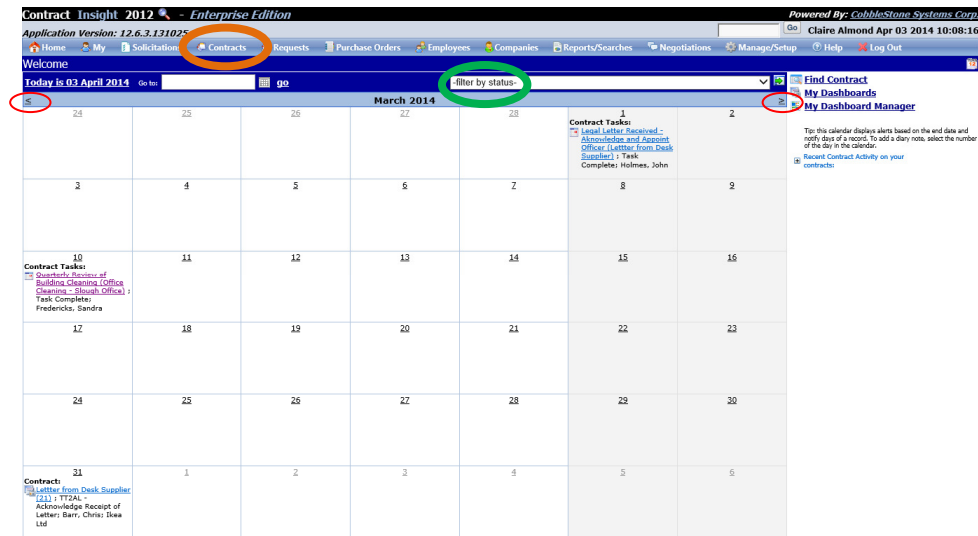


Contract Insight – Demo Script Car Lease Agreement

http://www.4demo.co.uk/contract12_63_client

1. → Default Login as Claire Almond (login 'cea', password 'cea'), Administrator.
 - a. Default screen is either Calendar or Dashboard. (Will display the last screen when you logged out)
 - b. View of Tasks/Actions and Diary Notes Displayed in the Calendar
 - c. To view past/future months' Tasks/Actions click ≤ or ≥ (see ○)



2. 'filter by status' ○ enables you to change the view of Tasks/Actions in the calendar i.e. Task Complete, In Negotiation, Legal Letter Received
3. → To Create/Add a Contract
 - a. Select Contracts ○
 - b. Select Add Contract
 - c. Select a Type → Car Lease Agreement (drop down list)
 - d. Click 'Continue'

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 04 2014 11:35:34

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Add New Car Lease Agreement

Contract Type: Car Lease Agreement

Department/Division: IT Glasgow

Employee: Oracle, Sally

Contract Title: Mini Cooper

Customer/Vendor Name: BMW Lease Finance

MOT Renewal Date: 04/04/2017

Status: Awaiting Approval

Term/Occurrence: 5 Year

Vehicle Registration: CEA 1234

Location: Glasgow

Dates

Effective Date: 04/04/2014

Expiration Date: 04/04/2019

Record Info

Entered By: Almond, Claire

Contract ID:

Updated By: Almond, Claire

CONTINUE

You now need to enter/Confirm the data

1. Contract Type: Car Lease Agreement
2. Department/Division: IT Glasgow
3. Employee: Sally Oracle
4. Contract Title: Mini Cooper
5. Customer/Vendor Name: BMW Lease Finance
6. MOT Renewal Date: Enter date +3yrs
7. Status: Select Awaiting Approval from list
8. Term/Occurrence: 5 Year (it's a 5yr lease agreement)
9. Vehicle Registration: Enter a car reg
10. Location: Glasgow
11. Effective Date: Today's date
12. Expiration Date: Enter date + 5yrs
13. Press **→Continue**

NB: Status will reflect the workflow that has been installed. For this demo it is Awaiting Approval, however you can show the other options available

4. → To Add Documents to a Contract

- a. Go to Attachments
- b. Browse for documents to attach (suggest you set up a Demo Documents folder on PC)
- c. Select Company Motor Policy
- d. Attach documents and click on Save

5. → Logout Process

- a. Go to 'Home' and select My Calendar
- b. As Administrator you will see Task assigned to Tom Charles Peters **3** days from the entry date (3 days is the default time allowed for the next person to approve – this is customisable)
- c. Then Log out **2**

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 03 2014 12:22:02

Welcome Today is 03 April 2014 go

Filter by status:

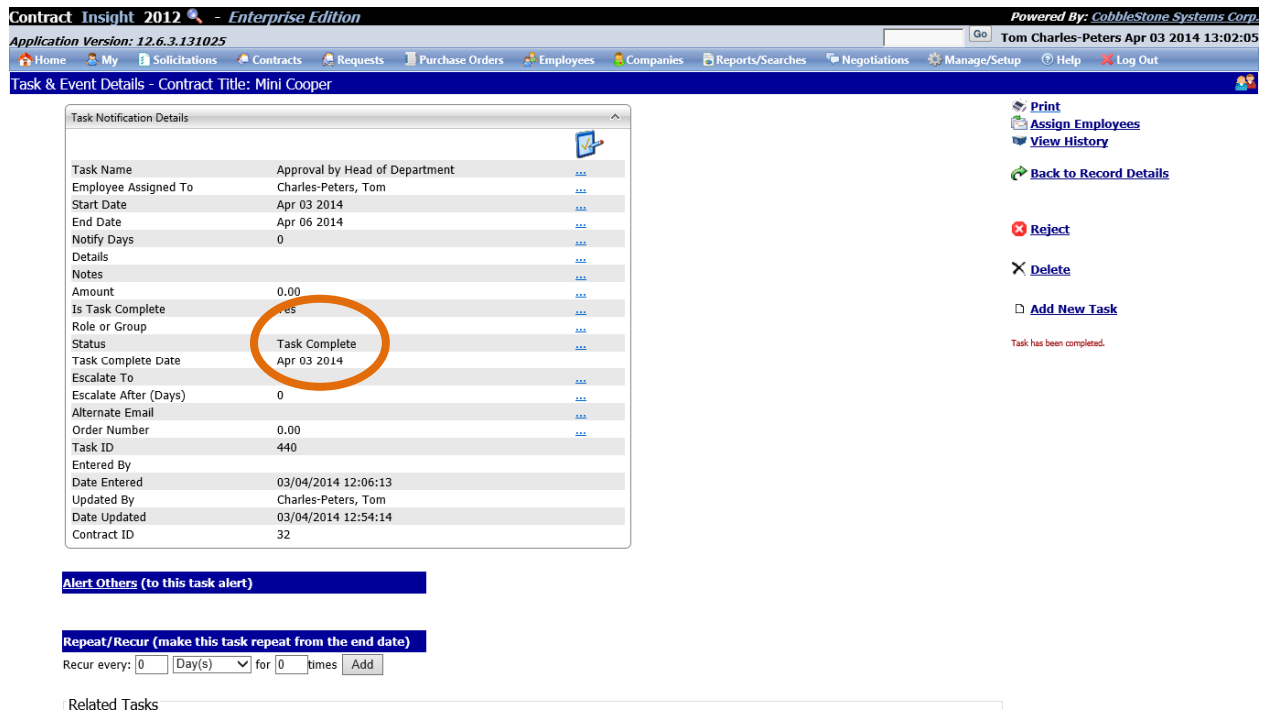
April 2014						
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Contract Tasks

7 days from the end of the day in the calendar. To add a day note, select the number of the day in the calendar.

calendar alerts

6. → Now Login as Employee Manager Tom Charles Peters (login 'tcp', password 'tcp')
 - a. Prior to this an email will have been sent to Tom Charles Peters to say that he has a task to view
7. See the Task in the calendar 'Approve by Employee Manager'. Click on Task
8. Task will appear and click on [View](#)
9. Action options will appear on the Right Hand Side of the screen
10. Select Complete/Approve. This will update the status of the contract at this stage 



Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Tom Charles-Peters Apr 03 2014 13:02:05

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Task & Event Details - Contract Title: Mini Cooper

Task Notification Details	
Task Name	Approval by Head of Department
Employee Assigned To	Charles-Peters, Tom
Start Date	Apr 03 2014
End Date	Apr 06 2014
Notify Days	0
Details	
Notes	
Amount	0.00
Is Task Complete	Yes
Role or Group	
Status	Task Complete
Task Complete Date	Apr 03 2014
Escalate To	
Escalate After (Days)	0
Alternate Email	
Order Number	0.00
Task ID	440
Entered By	
Date Entered	03/04/2014 12:06:13
Updated By	Charles-Peters, Tom
Date Updated	03/04/2014 12:54:14
Contract ID	32

Alert Others (to this task alert)

Repeat/Recur (make this task repeat from the end date)

Recur every: 0 Day(s) for 0 times

Related Tasks

[Print](#)

[Assign Employees](#)

[View History](#)

[Back to Record Details](#)

[Reject](#)

[Delete](#)

[Add New Task](#)

Task has been completed.

11. → Logout Process
 - a. Go to 'Home' and select My Calendar
 - b. Then Log out
12. → Now Login as 'Toby Money' Financial Controller (Login 'tm', password 'tm')
 - a. Prior to this an email will have been sent to Toby Money to say that he has a task to view
13. Select task in the Calendar. Click on task
14. Task will appear and click on [View](#)

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

Powered By: CobbleStone Systems Corp.

Toby Money Apr 03 2014 13:10:23

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Task & Event Details - Contract Title: Mini Cooper

Task Notification Details

Task Name	Approve by Finance	AAA
Employee Assigned To	Money, Toby	AAA
Start Date	Apr 04 2014	AAA
End Date	Apr 06 2014	AAA
Notify Days	0	AAA
Details		AAA
Notes		AAA
Amount	0.00	AAA
Is Task Complete	No	AAA
Role or Group		AAA
Status		AAA
Task Complete Date		AAA
Escalate To		AAA
Escalate After (Days)	0	AAA
Alternate Email		AAA
Order Number	0.00	AAA
Task ID	441	
Entered By		
Date Entered	03/04/2014 12:54:14	
Updated By		
Date Updated	03/04/2014 12:54:14	
Contract ID	32	

Print

Assign Employees

View History

Back to Record Details

Complete/Approve

Reject

Delete

Alert Others (to this task alert)

Repeat/Recur (make this task repeat from the end date)

Recur every: 0 Day(s) for 0 times Add

Related Tasks

15. Complete/Approve
16. See the second task in the list
17. 'Activate Contract' Task , click on [View](#)
18. Complete/Approve – Contract has now been activated and all related actions/tasks have been assigned

Tasks, E-mails, Workflow, Alerts

Tasks, Alerts, Events, & Workflow Add Task

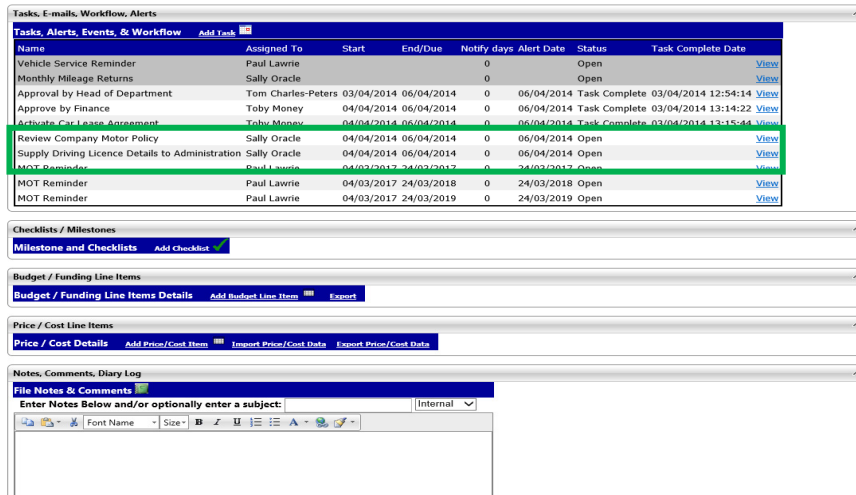
Approval by Head of Department	Tom Charles-Peters	04/04/2014 07/04/2014	0	07/04/2014 Task Complete	04/04/2014 11:38:43	View
Approve by Finance	Toby Money	05/04/2014 07/04/2014	0	07/04/2014 Task Complete	04/04/2014 11:39:36	View
Activate Car Lease Agreement	Toby Money	05/04/2014 07/04/2014	0	07/04/2014 Task Complete	04/04/2014 11:40:05	View
Review Company Motor Policy	Sally Oracle	05/04/2014 07/04/2014	0	07/04/2014 Open		View
Supply Chain	Sally Oracle	04/05/2014 14/05/2014	0	14/05/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/06/2014	0	14/06/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/07/2014	0	14/07/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/08/2014	0	14/08/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/09/2014	0	14/09/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/10/2014	0	14/10/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/11/2014	0	14/11/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/12/2014	0	14/12/2014 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/01/2015	0	14/01/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/02/2015	0	14/02/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/03/2015	0	14/03/2015 Open		View
Vehicle Service Reminder	Paul Lawrie	28/02/2015 30/03/2015	0	30/03/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/04/2015	0	14/04/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/05/2015	0	14/05/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/06/2015	0	14/06/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/07/2015	0	14/07/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/08/2015	0	14/08/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/09/2015	0	14/09/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/10/2015	0	14/10/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/11/2015	0	14/11/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/12/2015	0	14/12/2015 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/01/2016	0	14/01/2016 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/02/2016	0	14/02/2016 Open		View
Monthly Mileage Returns	Sally Oracle	04/05/2014 14/03/2016	0	14/03/2016 Open		View
Vehicle Service Reminder	Paul Lawrie	28/02/2015 30/03/2016	0	30/03/2016 Open		View

19. → Logout Process
 - a. Go to 'Home' and select My Calendar
 - b. Then Log out

20. → Login as 'Sally Oracle' (login 'so', password 'so')

- a. Prior to this an email will have been sent to Sally Oracle to say that she has a task to view

21. Select 'Review of Company Motor Policy' in the Calendar



Name	Assigned To	Start	End/Due	Notify days	Alert Date	Status	Task Complete Date
Vehicle Service Reminder	Paul Lawrie			0		Open	View
Monthly Mileage Returns	Sally Oracle			0		Open	View
Approval by Head of Department	Tom Charles-Peters	03/04/2014	06/04/2014	0	06/04/2014	Task Complete	03/04/2014 12:54:14 View
Approve by Finance	Toby Money	04/04/2014	06/04/2014	0	06/04/2014	Task Complete	03/04/2014 13:14:22 View
Activate Car Lease Agreement	Toby Money	04/04/2014	06/04/2014	0	06/04/2014	Task Complete	03/04/2014 13:15:44 View
Review Company Motor Policy	Sally Oracle	04/04/2014	06/04/2014	0	06/04/2014	Open	View
Supply Driving Licence Details to Administration	Sally Oracle	04/04/2014	06/04/2014	0	06/04/2014	Open	View
MOT Reminders	Paul Lawrie	04/03/2017	24/03/2017	0	24/03/2017	Open	View
MOT Reminder	Paul Lawrie	04/03/2017	24/03/2018	0	24/03/2018	Open	View
MOT Reminder	Paul Lawrie	04/03/2017	24/03/2019	0	24/03/2019	Open	View

Checklists / Milestones
Milestone and Checklists [Add Checklist](#)

Budget / Funding Line Items
Budget / Funding Line Items Details [Add Budget Line Item](#) [Export](#)

Price / Cost Line Items
Price / Cost Details [Add Price/Cost Item](#) [Import Price/Cost Data](#) [Export Price/Cost Data](#)

Notes, Comments, Diary Log
File Notes & Comments
Enter Notes Below and/or optionally enter a subject: Internal

Font Name: Size: **B** **I** **U** **A** **Color** **Background**

22. Complete task of 'Review Company Motor policy' by clicking on [View](#) button

23. Complete/Approve Task

24. Complete Task of 'Supplying Driving Licence Details' by clicking on [View](#) button

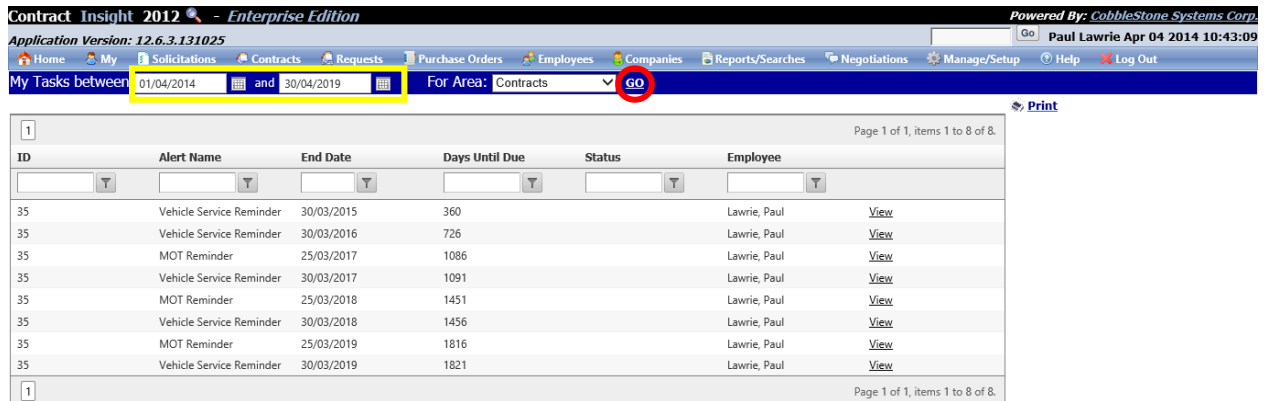
25. Complete/Approve Task

26. → Logout Process

- a. Go to 'Home' and select My Calendar
- b. Then Log out

27. → Login as 'Transport Manager – Paul Lawrie' (login 'pl' , password 'pl')

28. Click on 'My', select 'Task List'



Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

Powered By: CobbleStone Systems Corp.

Paul Lawrie Apr 04 2014 10:43:09

My Tasks between 01/04/2014 and 30/04/2019 For Area: Contracts GO

ID	Alert Name	End Date	Days Until Due	Status	Employee
35	Vehicle Service Reminder	30/03/2015	360		Lawrie, Paul View
35	Vehicle Service Reminder	30/03/2016	726		Lawrie, Paul View
35	MOT Reminder	25/03/2017	1086		Lawrie, Paul View
35	Vehicle Service Reminder	30/03/2017	1091		Lawrie, Paul View
35	MOT Reminder	25/03/2018	1451		Lawrie, Paul View
35	Vehicle Service Reminder	30/03/2018	1456		Lawrie, Paul View
35	MOT Reminder	25/03/2019	1816		Lawrie, Paul View
35	Vehicle Service Reminder	30/03/2019	1821		Lawrie, Paul View

Page 1 of 1, items 1 to 8 of 8.

You will need to change the date range to encompass the 3yr MOT dates and the Vehicle Service Reminders (so remember what dates you have used at the beginning)

Hit GO

The MOT and Service reminders populate automatically and are displayed

29. → Logout Process

- Go to 'Home' and select My Calendar
- Then Log out

END OF DEMONSTRATION

HOUSEKEEPING

This is a live demo, hosted on the Four server. All data is stored so at the end of each demo, remember to delete the demo data you have just entered.

- Default Login as Claire Almond (login 'cea', password 'cea'), Administrator.
- Select Contracts
- Select Find/Search Contracts
- Select View All

5. Find the contract you have added (BMW Lease Finance)
6. Select View
7. On the Right Hand Side of the screen there will be a list of options/actions. Scroll down until you see **X Delete**
8. Select Delete
9. Prompt will appear at the top of the screen to confirm Delete
10. Confirm Yes, delete it
11. → Logout Process
 - a. Go to 'Home' and select My Calendar
 - b. Then Log out

12. The system is now ready for the next client demonstration

Adding a new Field Type and link a Workflow to that Field *(this is an admin function)*

1. → Default Login as Claire Almond (login 'cea', password 'cea'), Administrator.
2. Select Manage/Setup
3. Select Field Manager
4. Select Manage Fields



See circled
area below

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Welcome

Today is 04 April 2014 Go to: go -filter by

Manage Fields

Manage/Assign Fields by Contract Types

Field Manager

- Departments/Divisions
- Locations
- Contract Types
- Contract Status
- Contract Occurrence
- Auto Extract Settings
- Contract Categories
- Employees/Users
- Document Templates
- Manage Security Groups
- Company List
- Clause Library
- Image Library
- Solicitation Types
- Workflow Manager
- Account Maintenance
- Application Configuration
- Catalog Manager
- Newsletters
- Contract Batch Entry

Contracts: 11

Letter from Desk Supplier (21) : TIZAL - Acknowledge Receipt of Letter; Barr, Chris; Ikea Ltd

Contract Tasks: 7

- Activate Car Lease Agreement (Mini Cooper) : Task Complete; Money, Toby
- Review Company Motor Policy (Mini Cooper) : Task Complete; Oracle, Sally
- Supply Driving Licence Details to Administration (Mini Cooper) : Task Complete; Oracle, Sally
- Approve by Finance (Mini Cooper) : Task Complete; Money, Toby
- Approval by Head of Department (Mini Cooper) : Task Complete; Charles-Peters, Tom

14 15 16 17 18 19

21 22 23 24 25 26 27

28 29 30 1 2 3 4

5. Select Table
6. Select Contract Details
7. Go to Actions... on Right Hand Side of screen and select **Add Field**

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Manage Fields

Select a table to manage: Contract Details

Order	Display Name	Field Group	Show on Emails
2	Up Down Contract Title	Edit True	
3	Up Down Customer/Vendor Name	Edit True	
5	Up Down Employee	Edit True	
11	Up Down Department/Division	Edit True	
12	Up Down Contract Type	Edit False	
13	Up Down Description	Edit True	
14	Up Down Renewal Notes	Edit True	
15	Up Down Collaboration Type	Edit False	
16	Up Down Renewed	Edit False	
18	Up Down Location	Edit False	
19	Up Down Status	Edit True	
20	Up Down Term/Occurrence	Edit True	
22	Up Down Category	Edit False	
29	Up Down Certification of Intent	Edit	
30	Up Down MOT Renewal Date	Edit	
31	Up Down Vehicle Registration	Edit	
32	Up Down Salary	Edit	
33	Up Down Holiday	Edit	
34	Up Down Weekly Hours	Edit	
35	Up Down Pension Contribution	Edit	
36	Up Down Job Description	Edit	
37	Up Down Company Car	Edit	
38	Up Down Start Date	Edit	
6	Up Down Effective Date	Dates Edit True	
7	Up Down Expiration Date	Dates Edit True	
8	Up Down Contract Notify Days	Dates Edit False	
9	Up Down Annual Review Date	Dates Edit True	

Actions...

- Add Field
- Manage Fields by Contract Type
- View History

How do I...

- Create & Manage Fields
- Quick Tutorial

8. Add in Details for the new field: Fuel Type, Drop Down Box, Diesel, Hybrid, Unleaded (see below)
9. Click Save

10. Click 'got back to [field manager](#)'

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 07 2014 09:45:36

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Add Field

Select a table to add a field to: Contract Details

[Back to Field Manager](#)

Add fields below

Field Name: (no spaces and non-standard characters)

Field Group: (optional: will group and order fields on display screen on Contract, Vendor, & Employee Screen)

Field Type: Drop Down Box

Length:

Default Value: Diesel, Hybrid, Unleaded

Required: False

Help Description:

field column added successfully, go back to [field manager](#)

11. Right Hand Side of Screen under Actions..., select Manage Fields by Contract Type

12. Select Car Lease Agreement

13. Find Fuel Type on the list and click Add . Add Fuel Type will now appear in the *Assigned Fields* table on the Left Hand Side of the screen

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 04 2014 12:01:11

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Manage/Assign Fields

1. select a Table (Screen): Contracts

2. select a Type: Car Lease Agreement

Note: please be sure to assign the required fields stated in the tip to the right in addition to the user defined fields

Assigned Fields (Remove All)

Field Group	Display Name	Field Name	Up	Down	Remove
Contract Type	Contract Type	Contract_Type_ID	Up	Down	Remove
Department/Division	Department/Division	Department_ID	Up	Down	Remove
Employee	Employee	Employee_ID	Up	Down	Remove
Contract Title	Contract Title	Contract_Title	Up	Down	Remove
Customer/Vendor Name	Customer/Vendor Name	Vendor_ID	Up	Down	Remove
MOT Renewal Date	MOT Renewal Date	u_MOTRenewalDate	Up	Down	Remove
Status	Status	Status_ID	Up	Down	Remove
Term/Occurrence	Term/Occurrence	OccurrenceID	Up	Down	Remove
Vehicle Registration	Vehicle Registration	u_VehicleRegistration	Up	Down	Remove
Location	Location	Location_ID	Up	Down	Remove
Dates	Effective Date	Contract_Start_Date	Up	Down	Remove
Dates	Expiration Date	Contract_End_Date	Up	Down	Remove
Record Info	Entered By	EnteredBy	Up	Down	Remove
Record Info	Contract ID	Contract_ID	Up	Down	Remove
Record Info	Updated By	UpdatedBy	Up	Down	Remove

Available Fields

Field Name	Add
Annual Review Date	Add
Anticipated Legal Costs	Add
Arbitration Hearing	Add
Barrister	Add
Budget Amount	Add
Category	Add
Certification of Intent	Add
Claim Status	Add
Collaboration Type	Add
Company Car	Add
Contract Amount	Add
Contract Notify Days	Add
Contract Request ID	Add
Court Date	Add
Date Entered	Add
Date Letter Recieved	Add
Date of Response	Add
Date Updated	Add
Description	Add
Expiration Warning Date	Add
External Solicitors	Add
Fuel Type	Add
Holiday	Add
Job Description	Add
Legal Cost to Date	Add
Name of Claimant	Add

Selected object: Contracts

[Copy Fields](#)

Tip

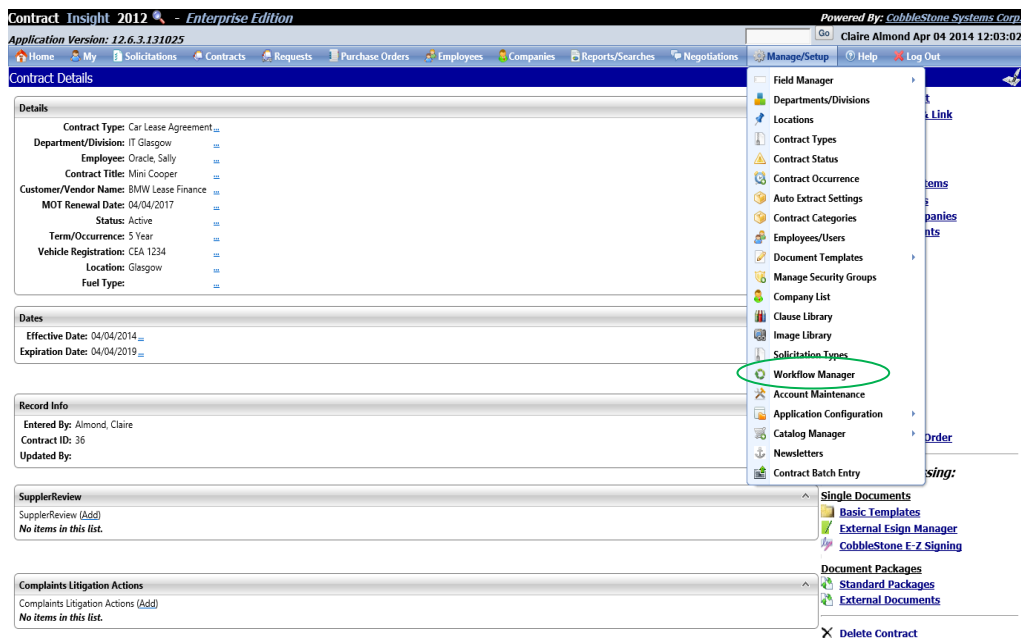
The following fields **should be** assigned for each type:

Contract Amount, Contract ID, Contract Notify Days, Contract Title, Contract Type, Customer/Vendor Name, Date Entered, Date Updated, Department/Division, Effective Date, Employee, Entered By, Expiration Date, Status, Updated By

How do I...

[Manage Fields by Contract Type](#)

14. Now to add a Workflow to that new field
15. Select Contracts & Select Find/Search Contracts
16. Select View All
17. Find the BMW Lease Finance entry and click [View](#)
18. You will see that Fuel Type has been added to the Details section
19. Select Manage/Setup
20. Select Workflow Manager Workflow Manager



21. Right Hand Side of Screen under Actions.... Select +Add
22. Workflow Manager Screen will appear

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 07 2014 09:49:18

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Workflow Manager

Applies to (Module) Contract Details Cancel

Workflow ID

Workflow Name Inform of Hybrid Vehicle

Active Yes

Run Job on Contract Update Yes

EnteredBy Almond, Claire

DateEntered

UpdatedBy Almond, Claire

DateUpdated

Populate the fields:

1. Applies to: Contract Details (drop down box)
2. Workflow Name: Inform of Hybrid Vehicle
3. Active: Yes
4. Run Job on Contract Update: Yes
5. Click on Continue

23. Select Contract Details

24. Select Car Lease Agreement – [View](#)

25. Add workflow criteria : Select Fuel Type from (drop down list)

26. equals : Hybrid (drop down list)

27. Select Add Workflow Criteria and details will expand

Back History Copy Workflow Delete Create & Manage Workflow

Applies to (Module) Contract Details

Workflow ID 2

Workflow Name Inform of Hybrid Vehicle

Active Yes

Run Job on Contract Updates Yes

EnteredBy Bar, Chris

DateEntered 04/04/2014 10:56:18

UpdatedBy Bar, Chris

DateUpdated 04/04/2014 10:56:18

Pre-defined Workflow Events

1. Add Workflow Criteria: Select workflow field: Fuel Type

Add Workflow Criteria

Workflow Criteria: Fuel Type

Assign Workflow Tasks

Task Title/Description: Inform of Hybrid Vehicle

Set the Task Start Date to: 0 days before records

Set the Task End Date to: 1 days after Date Updated

Repeat/Recur: do not recur

Escalate To (optional): select one after 0 days if the task is not complete

Alternate E-mail (optional): select one or email

Institute Alternative Assigned Employees (optional): No

Order Numbers (optional): 0 00

When Task is Completed/Approved: select one

When Task is Rejected/Not Approved: select one

Select Employee: Paul Lawrie
 Task Title: Inform of Hybrid Vehicle
 Set the task start date: 0 days, after, Date Updated
 Set the task end date: 1 days, after, Date Updated
 Select Add

28. Select Contracts & Select Find/Search Contracts

29. Select View All

30. Find the BMW Lease Finance entry and click [View](#)

31. Manually add in Hybrid to Fuel Type in Details section

32. Scroll down and see that a task has been added for Paul Lawrie

Files / Attachments

Attached Files, Documents, Images Refresh

Select File Browse... Notes: Save Attach Internal

Page 1 of 1, items 1 to 1 of 1.

View File	Notes	Entry Date	Entered By	Collaboration Type	Checked Out To	Last Viewed By	Last View Date	Ver.
Motor Policy.pdf		04/04/2014 11:37:38	Almond, Claire	Internal	--	--		1

Page 1 of 1, items 1 to 1 of 1.

Tasks, E-mails, Workflow, Alerts

Tasks, Alerts, Events, & Workflow Add Task Bulk Delete

Name	Assigned To	Start	End/Due	Notify days	Alert Date	Status	Task Complete Date
Inform or Hybrid Vehicle	Paul Lawrie	04/04/2014	05/04/2014	0	05/04/2014	Open	View
Approval by Head of Department	Tom Charles-Peters	04/04/2014	07/04/2014	0	07/04/2014	Task Complete	04/04/2014 11:38:43 View
Approve by Finance	Toby Money	05/04/2014	07/04/2014	0	07/04/2014	Task Complete	04/04/2014 11:39:36 View
Activate Car Lease Agreement	Toby Money	05/04/2014	07/04/2014	0	07/04/2014	Task Complete	04/04/2014 11:40:05 View
Review Company Motor Policy	Sally Oracle	05/04/2014	07/04/2014	0	07/04/2014	Task Complete	04/04/2014 11:42:40 View
Supply Driving Licence Details to Administration	Sally Oracle	05/04/2014	07/04/2014	0	07/04/2014	Task Complete	04/04/2014 11:42:52 View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/05/2014	0	14/05/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/06/2014	0	14/06/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/07/2014	0	14/07/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/08/2014	0	14/08/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/09/2014	0	14/09/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/10/2014	0	14/10/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/11/2014	0	14/11/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/12/2014	0	14/12/2014	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/01/2015	0	14/01/2015	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/02/2015	0	14/02/2015	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/03/2015	0	14/03/2015	Open	View
Vehicle Service Reminder	Paul Lawrie	28/02/2015	30/03/2015	0	30/03/2015	Open	View
Monthly Mileage Returns	Sally Oracle	04/05/2014	14/04/2015	0	14/04/2015	Open	View

NB: Remember to go back in as Administrator and delete the added field and workflow after the demonstration

How to Delete the Workflow and the Field Type

Field Type

1. Select Manage/Setup
2. Select Manage Fields
3. Select Contract Details
4. Scroll down the list and find Fuel Type
5. Select Edit
6. On Right Hand Side of Screen, select [Delete Field](#)
7. Prompt will appear underneath **Yes, delete**

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Application Version: 12.6.3.131025 Go Claire Almond Apr 07 2014 09:58:36

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Edit Field

Edit field below

Field Name: u_FuelType [Back to Field Manager](#)

Display Name: Fuel Type (text characters only; do not add non-standard characters)

Field Group: (optional: will group and order fields on display screen for Contracts, Employees, and Vendors)

Drop Down Type: List Values

Field Type: Drop Down Box Field Order (rank to): 52 In System: No

Required: False Show on E-mail Alerts: No

Default Values: Diesel, Hybrid, Unleaded

Help Description:

Save

Delete Field

This field is assigned 2 times.
Are you sure you want to delete this field and remove any stored data in this field?

Yes, delete No, cancel

Field assigned to:
Total Records: 2
Custom Legacy Searches: 0
Ad-Hoc Searches: 0
Assigned Gateway Fields: 0
Custom Lists: 0
Field Restrictions by Employee: 0
Field Restrictions by Security Group: 0
Custom Mapped Fields/Tables: 0
Contract Type Templates: 0
Fields Assigned by Contract Type: 1
Workflow Conditions: 1
Workflow Tasks by Contract Type: 0
Workflow Tasks by Contract Status: 0
Workflow Tasks by Contract Department: 0

Workflow

1. Select Manage/Setup
2. Select Workflow Manager
3. Under WorkflowName, find Inform of Hybrid Vehicle
4. Select Edit
5. On Right Hand Side of Screen Select X [Delete](#)
6. Prompt will appear at top of screen Yes, delete it.

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp.

Application Version: 12.6.3.131025 Go Claire Almond Apr 07 2014 10:00:07

Home My Solicitations Contracts Requests Purchase Orders Employees Companies Reports/Searches Negotiations Manage/Setup Help Log Out

Workflow Configuration

Are you sure you want to delete this record?

Applies to (Module) Contract Details

Workflow ID 24

Workflow Name Inform of Hybrid Vehicle

Active Yes

Run Job on Contract Update Yes

EnteredBy Almond, Claire

DateEntered 07/04/2014 09:50:39

UpdatedBy Almond, Claire

DateUpdated 07/04/2014 09:50:39

Pre-defined Workflow Events

1. Add Workflow Criteria: Select workflow field: -Select One-

Task Name	Assigned To	Role Name	Add Start Date	Start Date Field	Add End Date	End Date Field	Notify Days	Recur	Escalate To	Escalate (days)	Alternate E-mail	Incl. Alt. Employees	Order	Default Note	Update Field OnComplete	Set Value to OnComplete	Update Field OnReject	Set Value OnReject
Inform of Hybrid Vehicle	Paul Lawrie		0	Date Updated	0	Date Updated	0	0		0		False	0.00	0		0		

Note when editing: Scroll up on edit

Print
Back
View History
Copy Workflow

Delete

Create & Manage Workflow