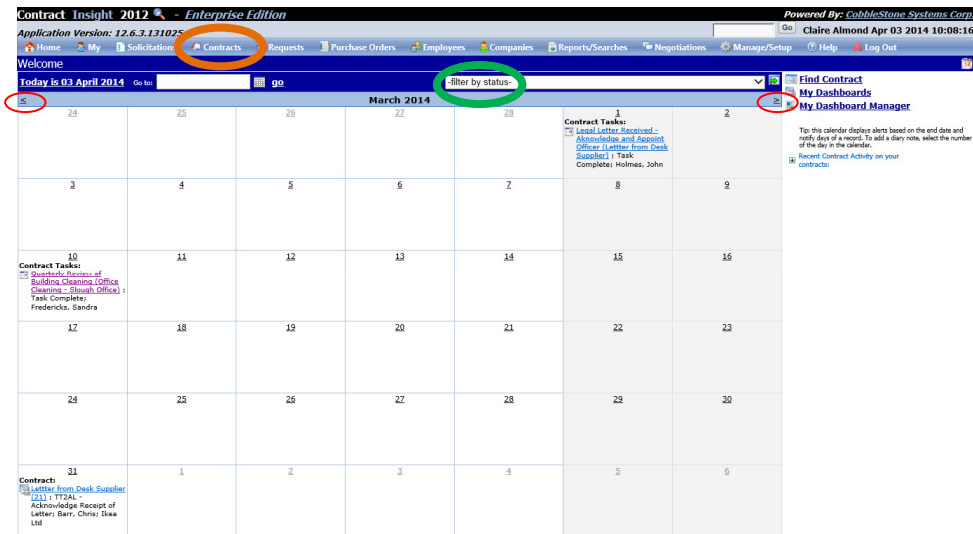


Contract Insight – Demo Script Supplier Review

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 → Service 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 16 2014 09:56:29

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

Add New Service Agreement

Contract Type: Service Agreement
 Department/Division: Information Systems
 Employee: Almond, Claire
 Contract Title: Hardware Support
 Customer/Vendor Name: Access Support Systems
 Description: Technical Support for PC and Display Units
 Status: Active
 Term/Occurrence: 1 Year

Dates
 Effective Date: 01/04/2014
 Expiration Date: 31/03/2015
 Contract Notify Days: 60

Record Info
 Entered By: Almond, Claire
 Contract ID:
 Date Entered:
 Date Updated:
 Updated By: Almond, Claire

+Company
Cancel

→ CONTINUE

You now need to enter/Confirm the data

1. Contract Type: Service Agreement
2. Department/Division: Information Systems
3. Employee: Claire Almond
4. Contract Title: Hardware Support
5. Customer/Vendor Name: Access Support Systems
6. Description: *Optional*
7. Status: Select Active from drop down list
8. Term/Occurrence: 1 Year (it's a 1yr support agreement)
9. Effective Date: Today's date
10. Expiration Date: Enter date + 1yr
11. Press **→Continue**

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

4. Once Continue has been clicked you will see that the quarterly reviews on this contract have been automatically set up in the system.

Complaints Litigation Actions (Add)
No items in this list.

Supplier Review (Add)
No items in this list.

Files / Attachments
Attached Files, Documents, Images Refresh
Select File Browse... Notes: Save Attach Internal

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
Supplier Review Claire Almond	01/04/2014	30/06/2014	0	30/06/2014	Open	View	
Supplier Review Claire Almond	01/04/2014	30/09/2014	0	30/09/2014	Open	View	
Supplier Review Claire Almond	01/04/2014	30/12/2014	0	30/12/2014	Open	View	
Supplier Review Claire Almond	01/04/2014	30/03/2015	0	30/03/2015	Open	View	

Checklists / Milestones
Milestone and Checklists Add Checklist

Budget / Funding Line Items
Budget / Funding Line Items Details Add Budget Line Item Export Bulk Delete

Price / Cost Line Items
Price / Cost Details Add Price/Cost Item Import Price/Cost Data Export Price/Cost Data Bulk Delete

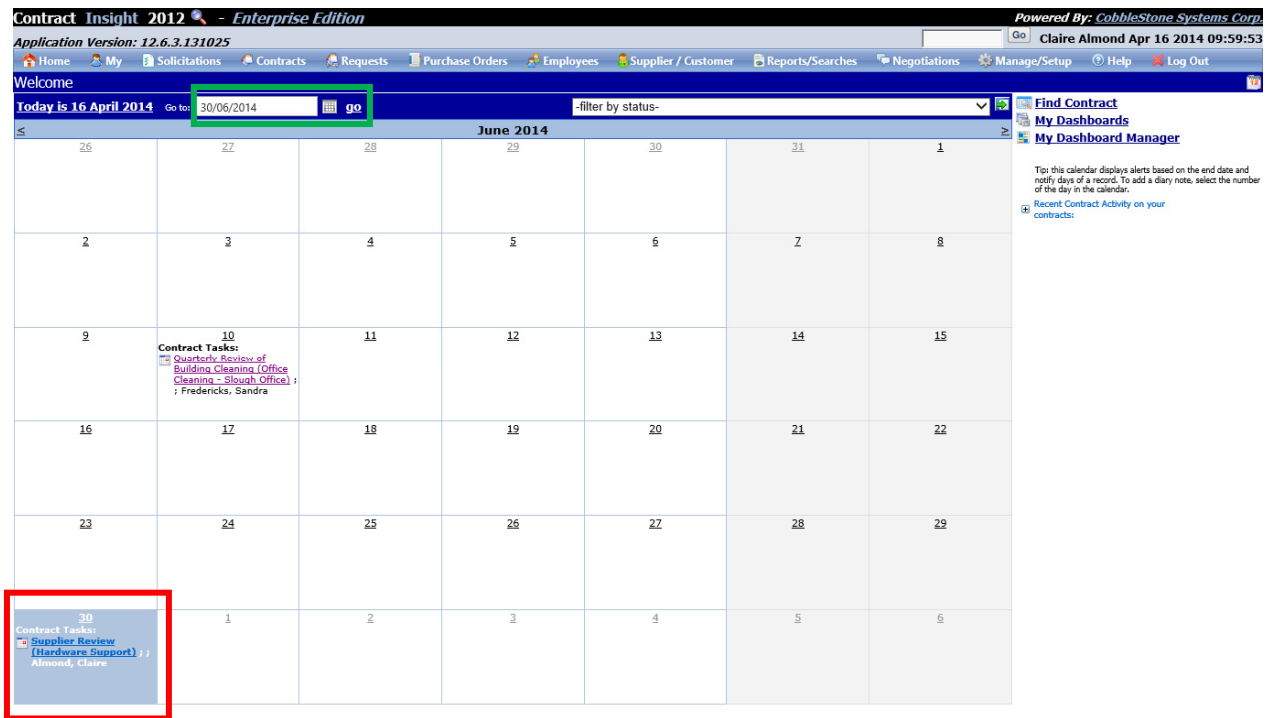
Notes, Comments, Diary Log
File Notes & Comments

Single Documents
Basic Templates
External Esign Manager
CobbleStone E-Z Signing

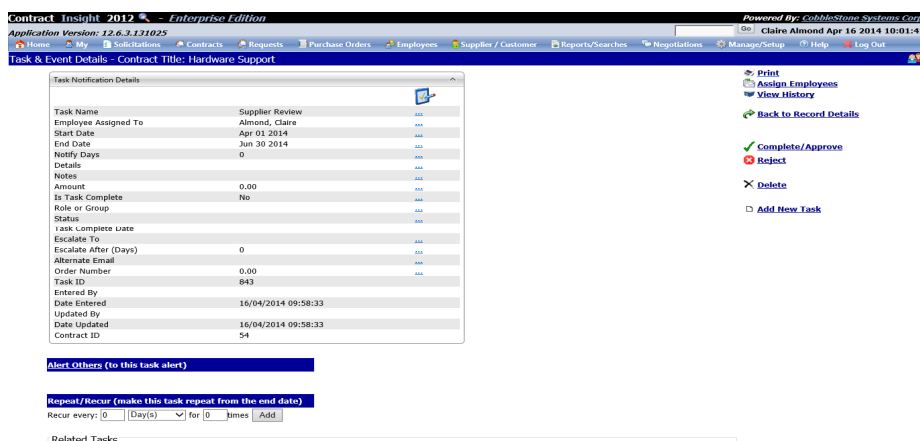
Document Packages
Standard Packages
External Documents

Delete Contract

5. Now select Home → My Calendar
6. Select the date for the first quarterly review
7. The task “Supplier Review” is now in the calendar. Prior to this a reminder email will have been sent to drive the reviewer to the task



8. Click on the task in the calendar
9. You will then see the task list and select the one for the first quarterly review by clicking on [View](#) (to the right of the task)
10. The screen below will appear



11. Click on [Complete/Approve](#)

12. The task in the task list will show as 'Complete'. This is date and time stamped (for audit purposes)

Record Info
 Entered By: Almond, Claire
 Contract ID: 54
 Date Entered: 16/04/2014 09:58:33
 Date Updated: 16/04/2014 10:02:06
 Updated By:

Complaints Litigation Actions
 Complaints Litigation Actions (Add)
 No items in this list.

Supplier Review
 Supplier Review (Add)
 No items in this list.

Files / Attachments
 Attached Files, Documents, Images Refresh
 Select File Browse... Notes: Save

Tasks, E-mails, Workflow, Alerts

Name	Assigned To	Start	End/Due	Notify days	Alert Date	Status	Task Complete Date
Supplier Review	Claire Almond	01/04/2014	30/06/2014	0	30/06/2014	Task Complete	16/04/2014 10:02:06 View
Supplier Review	Claire Almond	01/04/2014	30/09/2014	0	30/09/2014	Open	View
Supplier Review	Claire Almond	01/04/2014	30/12/2014	0	30/12/2014	Open	View
Supplier Review	Claire Almond	01/04/2014	30/03/2015	0	30/03/2015	Open	View

Checklists / Milestones
 Milestone and Checklists Add Checklist

[Financials](#)
[Company Info](#)
[Copy](#)
[E-mail](#)
[View Ratings](#)
[Create Purchase Order](#)

Document Processing:
 Single Documents
[Basic Templates](#)
[External Esign Manager](#)
[CobbleStone E-Z Signing](#)

Document Packages
[Standard Packages](#)
[External Documents](#)

[Delete Contract](#)

13. Now scroll up the page to the Supplier Review section (this is a table) and click on (Add) - see above screen shot

14. Now fill in the details of the review. Boxes marked with an * are mandatory and select your choice from the drop down lists

15. Then Click on Continue

Contract Insight 2012 - Enterprise Edition Powered By: CobbleStone Systems Corp
 Application Version: 12.6.3.131025 Go Claire Almond Apr 16 2014 10:02:43
 Home My Solicitations Contracts Requests Purchase Orders Employees Supplier / Customer Reports/Searches Negotiations Manage/Setup Help Log Out

Add SupplierReview

Supplier * [Cancel](#)
 Department *
 Date of Review *
 Reviewed By *
 Response Time (IA) *
 Fix Time (IA) *
 Overall Performance *
 Technical Performance *
 Detail of Comment / Complaint *
 Company
 Is Deleted
 Date Entered
 Date Updated
 Entered By
 Updated By
 SupplierReviewID
 Contract_ID

16. The details enter will appear in the Supplier Review table. Reports can be run off the table and used during the quarterly reviews

Complaints Litigation Actions

Complaints Litigation Actions (Add)

No items in this list.

Supplier Review

Supplier Review (Add)

Supplier	Department	Date of Review	Reviewed By	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint	
view	Access Support Systems	IT	30/06/2014 00:00:00	Claire Almond	<1 hour	<1 day	Good	Good	Overall Good Response and Support

Files / Attachments

Attached Files, Documents, Images [Refresh](#)

Select File Notes:

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
Supplier Review Claire Almond	01/04/2014	30/06/2014	0	30/06/2014	Task Complete	16/04/2014 10:02:06	View
Supplier Review Claire Almond	01/04/2014	30/09/2014	0	30/09/2014	Open		View
Supplier Review Claire Almond	01/04/2014	30/12/2014	0	30/12/2014	Open		View
Supplier Review Claire Almond	01/04/2014	30/03/2015	0	30/03/2015	Open		View

Checklists / Milestones

Milestone and Checklists [Add Checklist](#)

Budget / Funding Line Items

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

Price / Cost Line Items

Price / Cost Details [Add Price/Cost Item](#) [Import Price/Cost Data](#) [Export Price/Cost Data](#) [Bulk Delete](#)

Document Processing:

Single Documents

- Basic Templates
- External Esign Manager
- CobbleStone E-Z Signing

Document Packages

- Standard Packages
- External Documents

Delete Contract

17. Now select the next review to complete (will be the next quarter review)

18. This time **X** [Reject](#) the task

19. This will prompt another task which will ask you to add the Rejection Reasons to the Supplier Review table. It will also change the Status from 'Active' to 'Under Review' (you can scroll to the top of the screen to show this)

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
Rejection Reasons Claire Almond	16/04/2014	17/04/2014	0	17/04/2014	Open		View
Supplier Review Claire Almond	01/04/2014	30/06/2014	0	30/06/2014	Task Complete	16/04/2014 10:02:06	View
Supplier Review Claire Almond	01/04/2014	30/09/2014	0	30/09/2014	Rejected	16/04/2014 10:04:55	View
Supplier Review Claire Almond	01/04/2014	30/12/2014	0	30/12/2014	Open		View
Supplier Review Claire Almond	01/04/2014	30/03/2015	0	30/03/2015	Open		View

Milestones and Checklists

Add Checklist

Budget / Funding Line Items

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

Price / Cost Line Items

Price / Cost Details [Add Price/Cost Item](#) [Import Price/Cost Data](#) [Export Price/Cost Data](#) [Bulk Delete](#)

Notes, Comments, Diary Log

Enter Notes Below and/or optionally enter a subject:

[Refresh](#)

Note: when editing the notes, the edited text will be displayed in the notes text editor above.

Contract Insight 2012 Enterprise Edition

Application Version: 12.6.3.131025

Powered By: CobbleStone Systems Corp.

Claire Almond Apr 16 2014 10:05:24

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

Task & Event Details - Contract Title: Hardware Support

Task Notification Details

Task Name: Rejection Reasons

Employee Assigned To: Almond, Claire

Start Date: Apr 16 2014

End Date: Apr 17 2014

Notify Days: 0

Details: Add Details of Rejection in Supplier Review Table

Notes:

Amount: 0.00

Is Task Complete: No

Role or Group:

Status:

Task Complete Date:

Escalate To:

Escalate After (Days): 0

Alternate Email:

Order Number: 847

Task ID:

Entered By:

Date Entered: 16/04/2014 10:04:55

Updated By:

Date Updated: 16/04/2014 10:04:55

Contract ID: 54

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

Print

Assign Employees

View History

Back to Record Details

Complete/Approve

Reject

Delete

Add New Task

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

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

Contract Details

Details

Contract Type: Service Agreement
 Department/Division: Information Systems
 Employee: Almond, Claire
 Contract Title: Hardware Support
 Customer/Vendor Name: Access Support Systems
 Description: Technical Support for PC and Display Units
 Status: Under Review
 Term/Occurrences: 1 Year

Dates

Effective Date: 01/04/2014
 Expiration Date: 31/03/2015
 Contract Notify Day: 60

Record Info

Entered By: Almond, Claire
 Contract ID: 54
 Date Entered: 16/04/2014 09:58:33
 Date Updated: 16/04/2014 10:04:55
 Updated By:

Complaints/Litigation Actions

Complaints/Litigation Actions (Add)
 No items in this list.

Supplier Review

Supplier	Department	Date of Review	Reviewed By	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint
Access Support	IT	30/06/2014	Claire	..	..	..	..	..

Document Processing:

Single Documents

Basic Templates

External Edsign Manager

CobbleStone E-Z Signing

Document Packages

Standard Packages

External Documents

Delete Contract

20. Now scroll up the page to the Supplier Review section again (this is a table) and click on (Add)

21. Now fill in the details of the “Poor” review. Boxes marked with an * are mandatory and select your choice from the drop down lists. Click on Continue

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

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

Add SupplierReview

Supplier: Access Support Systems *

Department: IT *

Date of Review: 30/09/2014 *

Reviewed By: Claire Almond *

Response Time (IA): <1 hour *

Fix Time (IA): > 1 week *

Overall Performance: Complaint *

Technical Performance: Poor *

Detail of Comment / Complaint: Poor Technical Knowledge
Additional Training Required *

Company: -select one-

Is Deleted: -select one-

Date Entered:

Date Updated:

Entered By: Almond, Claire

Updated By: Almond, Claire

SupplierReviewID:

Contract_ID:

CONTINUE

22. The details of the “Poor” review will appear in the Supplier Review table.

23. Now go and View the next quarter Supplier Review

24. Complete/Approve this task

25. Enter details of the “Good” Supplier Review to the table as before and click on Continue.

Contract Insight 2012 - Enterprise Edition

Application Version: 12.6.3.131025

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

Add SupplierReview

Supplier: Access Support Systems *

Department: IT *

Date of Review: 30/12/2014 *

Reviewed By: Claire Almond *

Response Time (IA): <1 hour *

Fix Time (IA): <3 hours *

Overall Performance: Good *

Technical Performance: Excellent *

Detail of Comment / Complaint: Training Completed
Technical Knowledge greatly improved *

Company: -select one-

Is Deleted: -select one-

Date Entered:

Date Updated:

Entered By: Almond, Claire

Updated By: Almond, Claire

SupplierReviewID:

Contract_ID:

CONTINUE

26. This will a) appear in the **Supplier Review table** (and good visually to show) and b) will return the Status to 'Active'

Complaints Litigation Actions
Complaints Litigation Actions (Add)
No items in this list.

Supplier Review
Supplier Review (Add)

	Supplier	Department	Date of Review	Reviewed By	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint
view	Access Support Systems	IT	30/06/2014 00:00:00	Claire Almond	<1 hour	<1 day	Good	Good	Overall Good Response and Support
view	Access Support Systems	IT	30/09/2014 00:00:00	Claire Almond	<1 hour	> 1 week	Complaint	Poor	Poor Technical Knowledge Additional Training Required
view	Access Support Systems	IT	30/12/2014 00:00:00	Claire Almond	<1 hour	<3 hours	Good	Excellent	Training Completed Technical Knowledge greatly improved

Files / Attachments
Attached Files, Documents, Images [Refresh](#)
Select File [Browse...](#) Notes: Save [Attach](#) [Internal](#)

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
Rejection Reasons	Claire Almond	16/04/2014	17/04/2014	0	17/04/2014	Task Complete	16/04/2014 10:05:55 View
Supplier Review	Claire Almond	01/04/2014	30/06/2014	0	30/06/2014	Task Complete	16/04/2014 10:02:06 View
Supplier Review	Claire Almond	01/04/2014	30/09/2014	0	30/09/2014	Rejected	16/04/2014 10:04:55 View
Supplier Review	Claire Almond	01/04/2014	30/12/2014	0	30/12/2014	Task Complete	16/04/2014 10:08:07 View
Supplier Review	Claire Almond	01/04/2014	30/03/2015	0	30/03/2015	Open	View

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

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

Document Processing:
Single Documents
[Basic Templates](#)
[External Esign Manager](#)
[CobbleStone E-Z Signing](#)
Document Packages
[Standard Packages](#)
[External Documents](#)
[Delete Contract](#)

Contract Insight 2012 - Enterprise Edition
Application Version: 12.6.3.131025
Home My Solicitations Contracts Requests Purchase Orders Employees Supplier / Customer Reports/Searches Negotiations Manage/Setup Help Log Out
Go Claire Almond Apr 16 2014 10:09:51

Contract Details
Details
Contract Type: Service Agreement
Department/Division: Information Systems
Employee: Almond, Claire
Contract Title: Hardware Support
Customer/Vendor Name: Access Support Systems
Description: Technical Support for PC and Display Units
Status: Active
Term/Occurrence: 1 Year

Dates
Effective Date: 01/04/2014
Expiration Date: 31/03/2015
Contract Notify Days: 60

Record Info
Entered By: Almond, Claire
Contract ID: 54
Date Entered: 16/04/2014 09:58:33
Date Updated: 16/04/2014 10:08:07
Updated By:

Complaints Litigation Actions
Complaints Litigation Actions (Add)
No items in this list.

Supplier Review
Supplier Review (Add)

	Supplier	Department	Date of Review	Reviewed By	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint
	Access Support		30/06/2014	Claire					

Document Processing:
Single Documents
[Basic Templates](#)
[External Esign Manager](#)
[CobbleStone E-Z Signing](#)
Document Packages
[Standard Packages](#)
[External Documents](#)
[Delete Contract](#)

27. Creating a table from the Supplier Review data

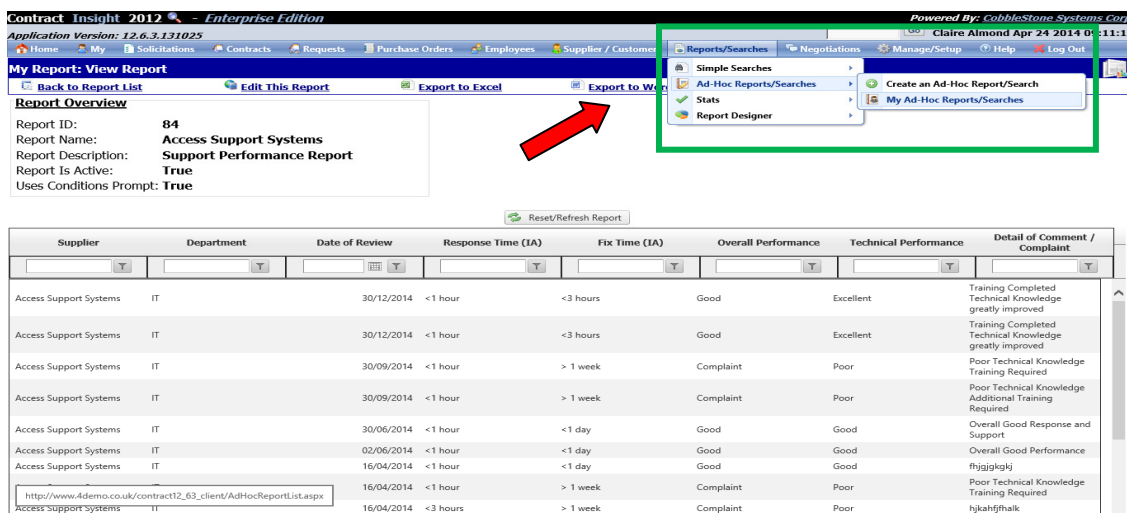
28. Go to Reports/Searches and select Ad-Hoc Reports/Searches

29. Select My Ad-Hoc Reports/Searches

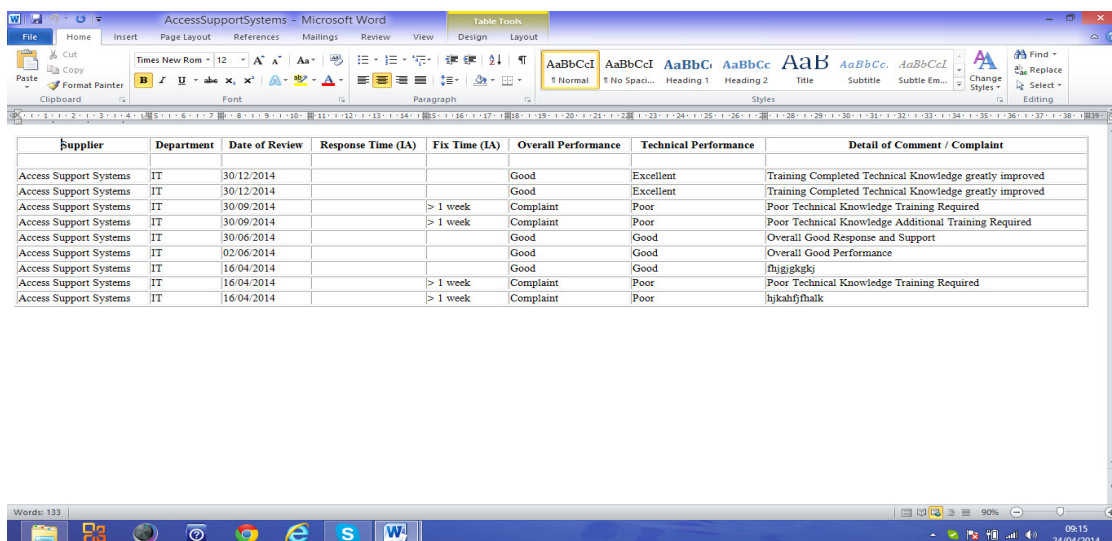
30. A list will appear of all the reports that exist

31. Select the one that is for Access Support Systems (NB that any demo data that has ever been entered against this contract will appear in the table)

32. Click on Export to Word.  Word will open with the table displayed. You can now incorporate this table into any documents, presentations, email



Supplier	Department	Date of Review	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint
Access Support Systems	IT	30/12/2014	<1 hour	<3 hours	Good	Excellent	Training Completed Technical Knowledge greatly improved
Access Support Systems	IT	30/12/2014	<1 hour	<3 hours	Good	Excellent	Training Completed Technical Knowledge greatly improved
Access Support Systems	IT	30/09/2014	<1 hour	> 1 week	Complaint	Poor	Poor Technical Knowledge Training Required
Access Support Systems	IT	30/09/2014	<1 hour	> 1 week	Complaint	Poor	Poor Technical Knowledge Additional Training Required
Access Support Systems	IT	30/06/2014	<1 hour	<1 day	Good	Good	Overall Good Response and Support
Access Support Systems	IT	02/06/2014	<1 hour	<1 day	Good	Good	Overall Good Performance
Access Support Systems	IT	16/04/2014	<1 hour	<1 day	Good	Good	fhjggkgkj
Access Support Systems	IT	16/04/2014	<1 hour	> 1 week	Complaint	Poor	Poor Technical Knowledge Training Required
Access Support Systems	IT	16/04/2014	<3 hours	> 1 week	Complaint	Poor	hjkahfthalk



Supplier	Department	Date of Review	Response Time (IA)	Fix Time (IA)	Overall Performance	Technical Performance	Detail of Comment / Complaint
Access Support Systems	IT	30/12/2014			Good	Excellent	Training Completed Technical Knowledge greatly improved
Access Support Systems	IT	30/12/2014			Good	Excellent	Training Completed Technical Knowledge greatly improved
Access Support Systems	IT	30/09/2014		> 1 week	Complaint	Poor	Poor Technical Knowledge Training Required
Access Support Systems	IT	30/09/2014		> 1 week	Complaint	Poor	Poor Technical Knowledge Additional Training Required
Access Support Systems	IT	30/06/2014			Good	Good	Overall Good Response and Support
Access Support Systems	IT	02/06/2014			Good	Good	Overall Good Performance
Access Support Systems	IT	16/04/2014			Good	Good	fhjggkgkj
Access Support Systems	IT	16/04/2014		> 1 week	Complaint	Poor	Poor Technical Knowledge Training Required
Access Support Systems	IT	16/04/2014		> 1 week	Complaint	Poor	hjkahfthalk

33. → Logout Process

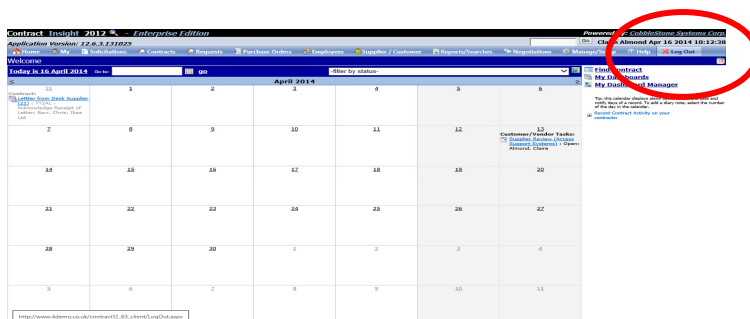
- a. Go back into the Contract Insight Screen
- b. Go to 'Home' and select My Calendar
- c. Then Log out

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.

1. → Default Login as Claire Almond (login 'cea', password 'cea'), Administrator.
2. Select Contracts
3. Select Find/Search Contracts
4. Select View All
5. Find the contract you have added : Access Support Systems - Hardware Support
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**