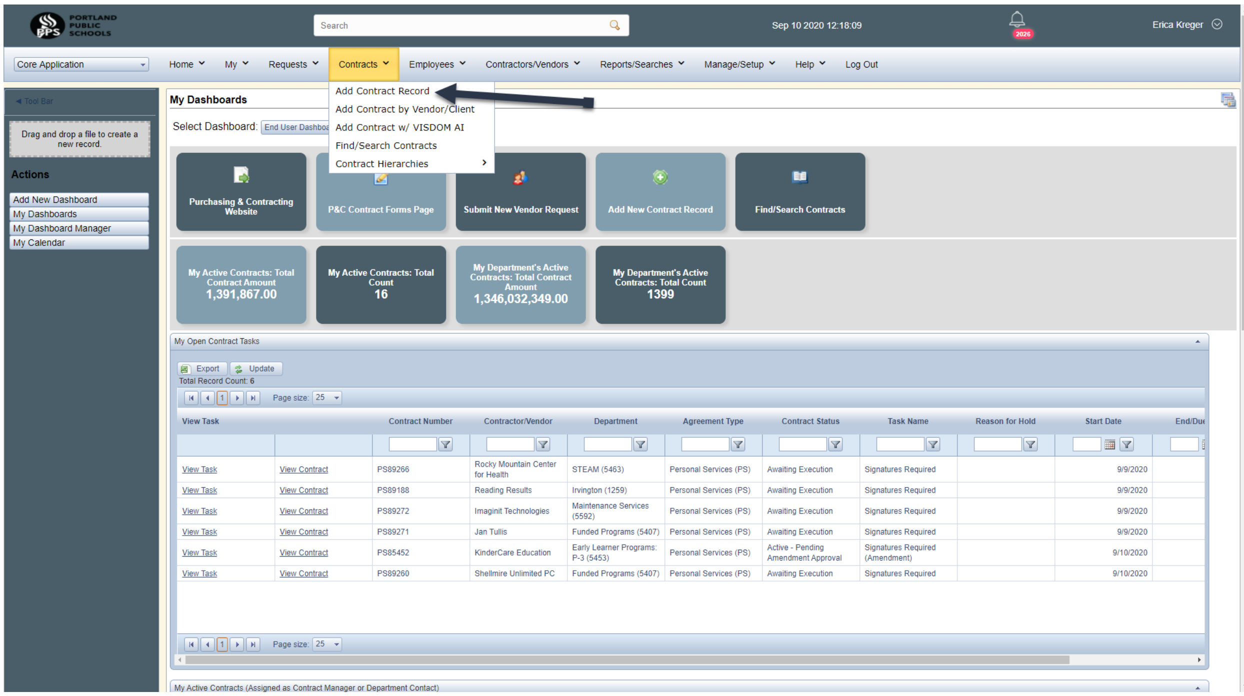
<u>New Contract Record</u>

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

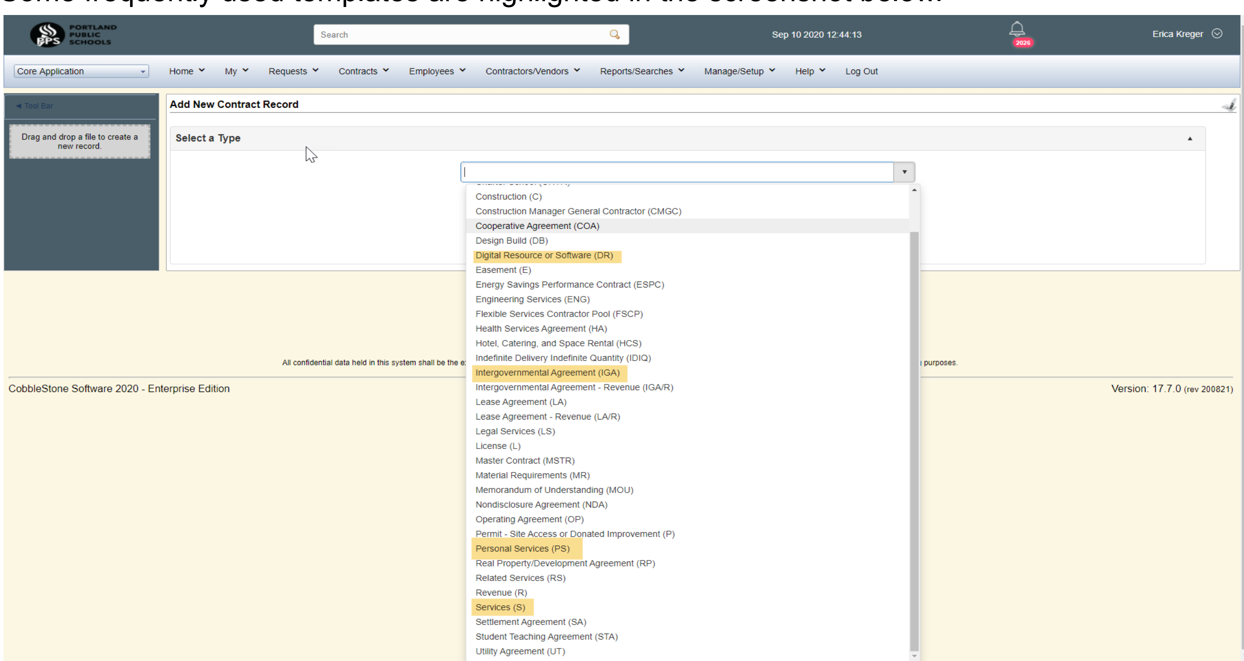
- Select Add Contract Record



Select the type of contract you want to create.

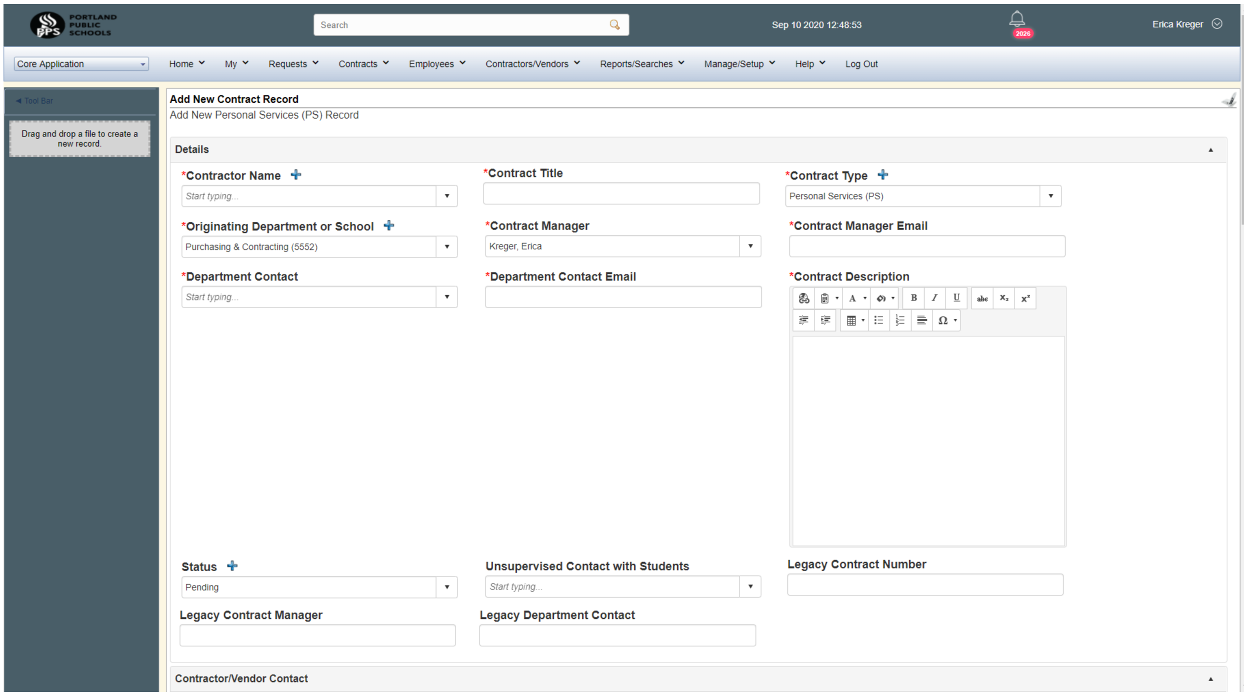
- Click continue

Some frequently used templates are highlighted in the screenshot below.



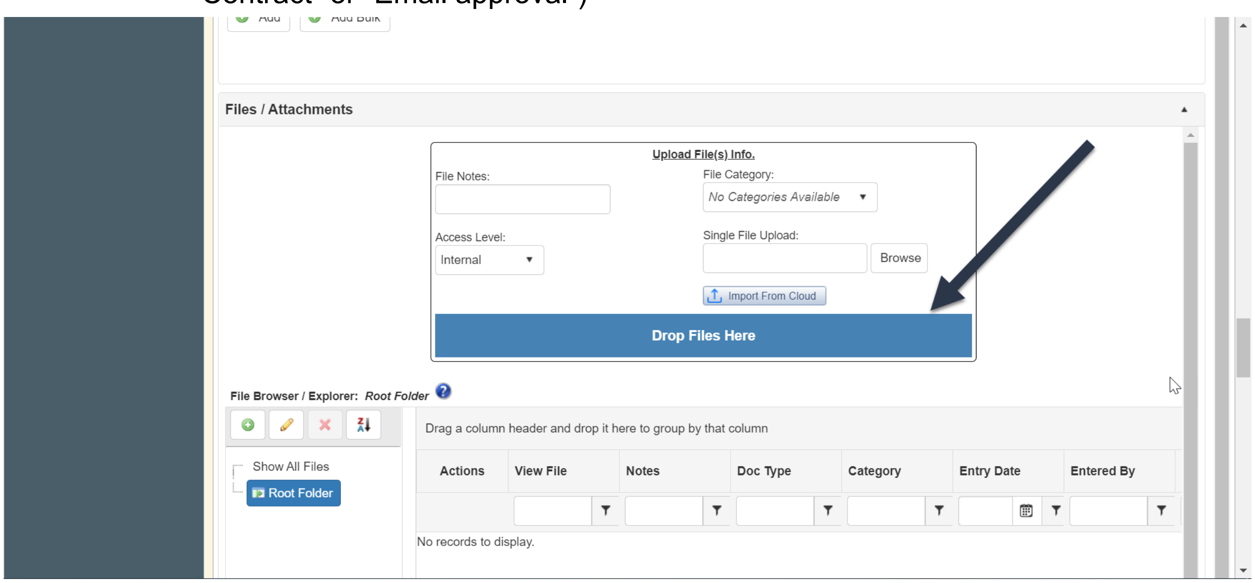
On the **Add New Contract Record** page, complete all fields with the red asterisks.

- Click ‘save and continue’

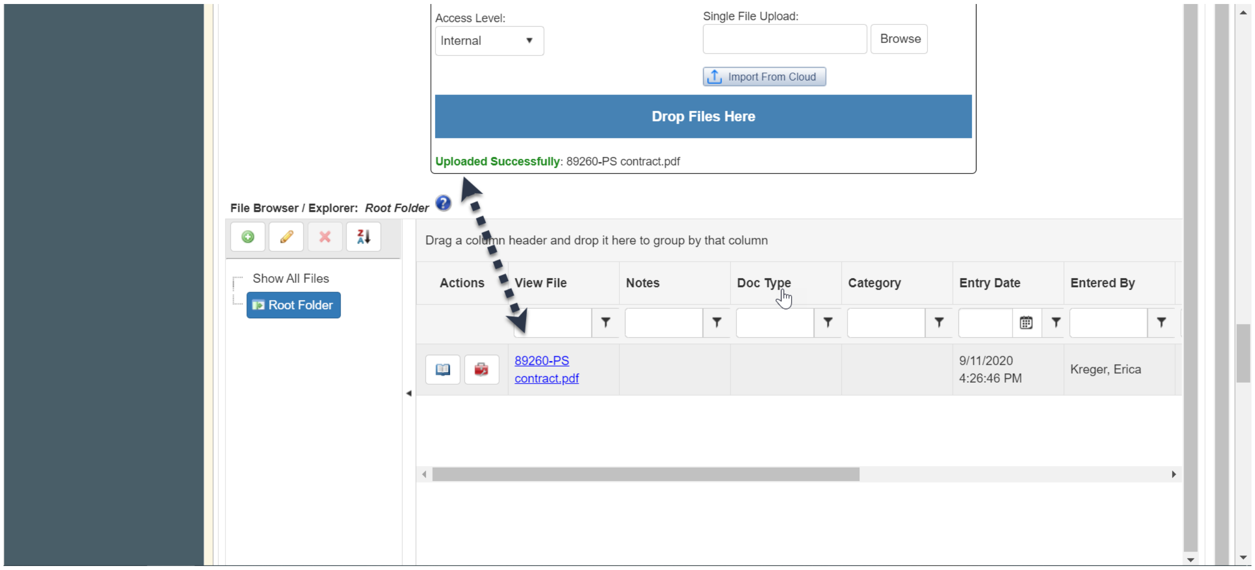


Contracts Details

- Check all information for correctness
- 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”)

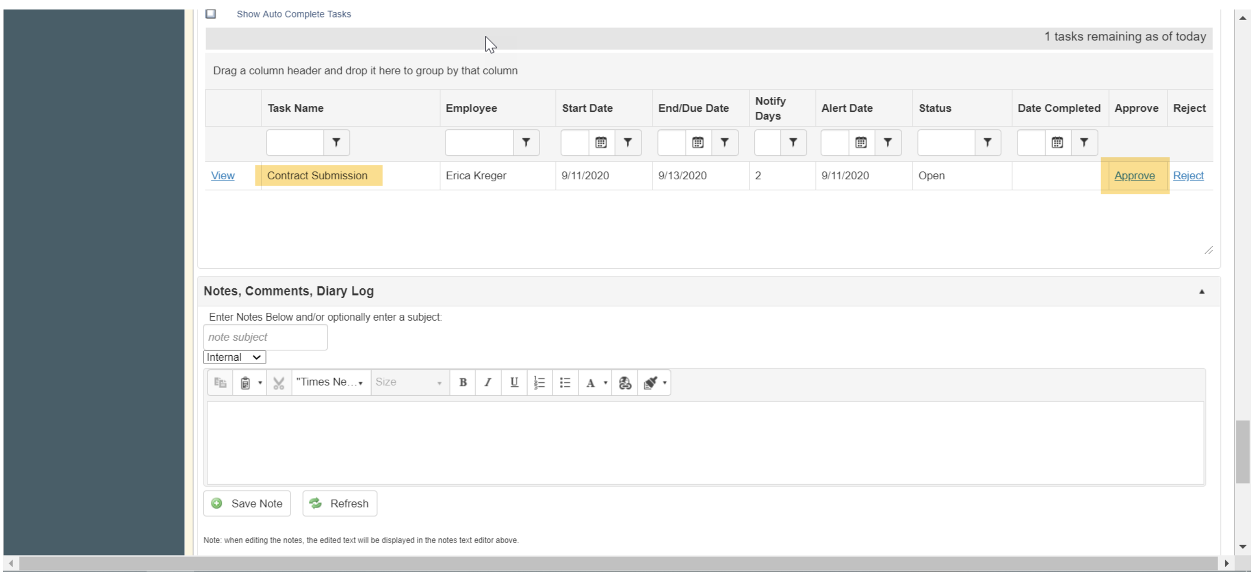


These two areas show upload is successfully completed

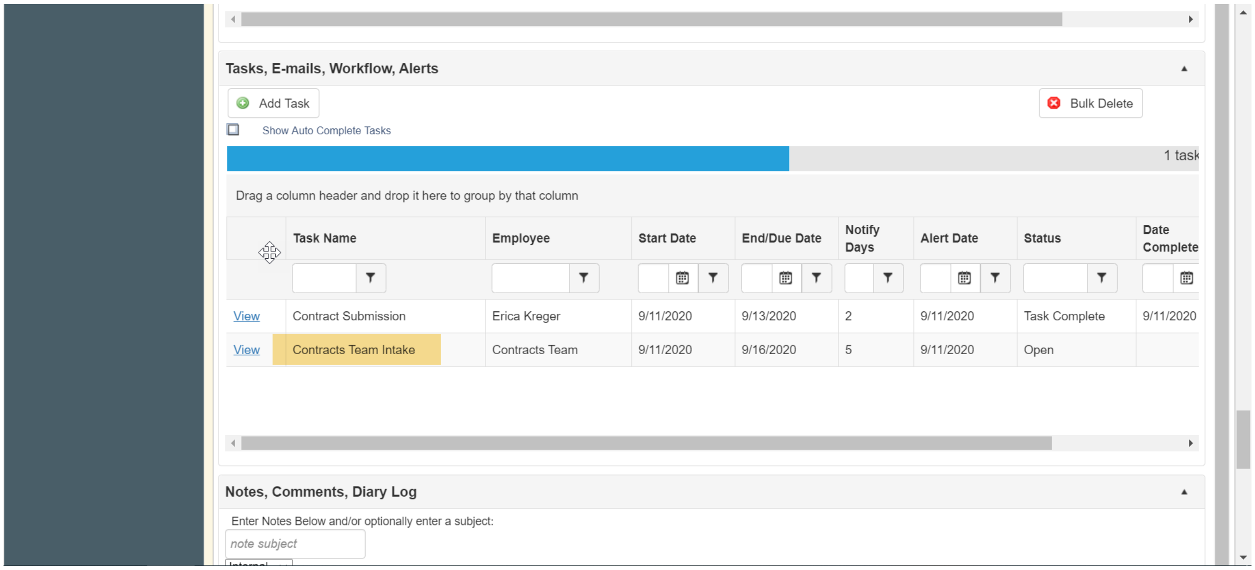


Scroll down the page until you see the **Tasks, E-mails, Workflow, Alerts** section

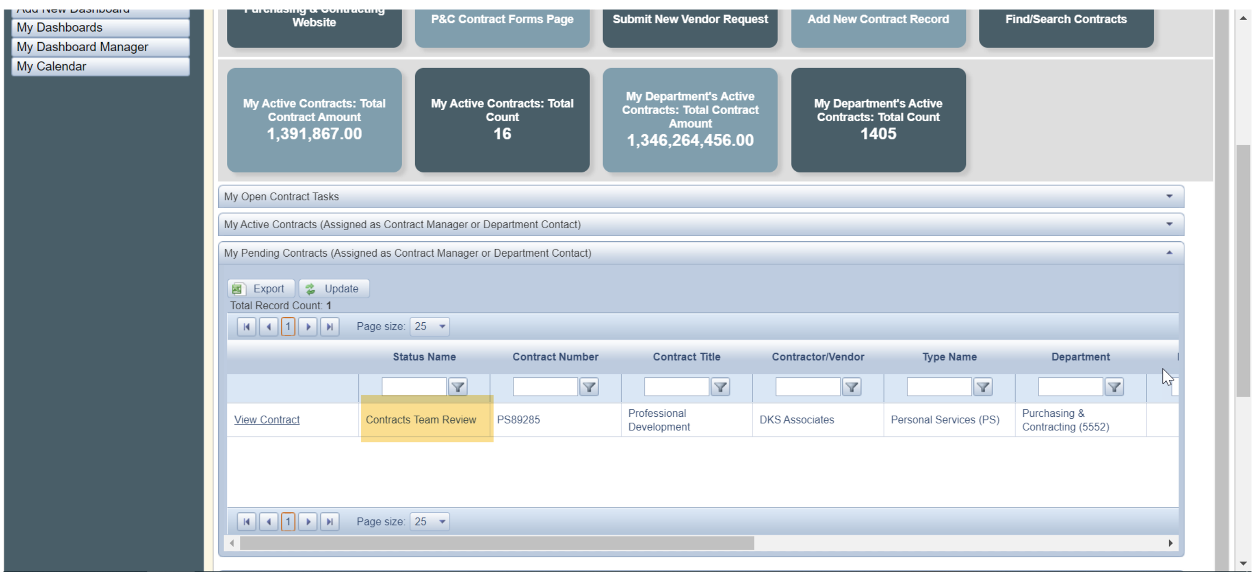
- Scroll to the right to and select Approve if all the information looks correct and all documents are uploaded



Once you have approved the task, you will see that it has been submitted to the Contracts Team in Purchasing & Contracting to start the intake process



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.