THE CONTRACT BOARD

USER MANUAL

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1. Introduction

Welcome to The Contract Board

Welcome to your new central hub for contract management!

This User Manual is designed as a practical, task-oriented guide for daily use.

> **Important Note**
>
> The Contract Board is a Kanban-style work management tool, not a traditional document repository. You will not upload your actual contract files or PDFs into The Contract Board. Your organization will continue to use its own secure, separate repository for the documents themselves.

Instead, The Contract Board helps you visualize the workflow, track statuses, and save time on e-mailing stakeholders — because stakeholders can get updates directly from the board.

Who Should Use This Guide?

This is a User Manual intended for day-to-day users of The Contract Board. If you need information on how The Contract Board is installed on your servers, or details about the underlying technology, please refer to the Installation Guide instead.

2. Getting Started: The Board

User Roles & Permissions

The Contract Board uses a straightforward, three-tiered permission system to keep your data secure while enabling effective team collaboration. Notably, there are no limits on the number of Read-Write Users or System Administrators your organization can have — assign roles freely to fit your workflow.

- **Read-Only Users** — The default viewing level. Can view the board and see contract statuses, but cannot make changes.
- **Read-Write Users** — The core working level. Can create Kanban Cards, edit existing ones, add notes, and update signature statuses.
- **System Administrators** — The highest access level. All Read-Write capabilities, plus the ability to promote users, delete inactive accounts, and permanently delete records.

How to Become a Read-Write User

When you first create your account, the system automatically designates you as a Read-Only User. This is a built-in security measure to ensure that only authorized team members can alter contract records.

To gain the ability to create and edit Kanban Cards, simply reach out to one of your organization's System Administrators and request that they update your account permissions. Once promoted, you will immediately have access to add and manage cards on the board.

3. Creating Kanban Cards

Creating a Contract's Kanban Card

Creating a new card is designed to be fast and flexible. You only need to enter the minimum required information to get a new Kanban Card onto the board.

At the beginning of a negotiation, you may not have all the details finalized — you might not even know who the ultimate signers will be. That is completely fine. Create the card now to start tracking the work and add the full signature plan later.

Editing a Kanban Card

As the contract progresses and more details become clear, you can easily open and edit the Kanban Card. Read-Write Users can update fields, refine the scope, and build out the signature plan as decisions are made in real time.

Handling Mistakes & Abandoned Contracts

If you create a Kanban Card by mistake, or if a contract falls through unexpectedly, you have two easy options to keep your workspace clean:

- **The Abandoned Status** — Edit the card and set its status to Abandoned. The card will instantly move off the main board and onto the designated Abandoned page until it can be permanently removed.
- **Permanent Deletion** — When you are ready to completely remove the record, contact a System Administrator. They have the permissions required to permanently delete the card from the system. (System Administrators may delete records themselves.)

4. Tracking Signatures / Completing a Contract

Updating Signature Statuses

The Contract Board is designed to operate independently of third-party e-signature platforms such as DocuSign or Adobe Sign. This keeps your data centralized and secure, but it does mean you will need to manually update the signature status on the Kanban Card when a party signs the agreement.

The system focuses strictly on actionable execution events — specifically, who "needs to sign" and who "needs to initial." There is no dedicated tracking status for someone who simply needs to receive a copy of the contract. You can track this easily by adding a Note to the Kanban Card documenting that you sent the finalized copy to the appropriate stakeholders.

Moving a Fully Signed Contract to "Completed" Status

Once the final person signs the agreement, the Kanban Card does not automatically shift from "Out for Signatures" to "Completed." A Read-Write User or System Administrator must manually change the status to "Completed" and enter the final completion date.

> **Why is this step manual?**
>
> It is common for signers to execute the main document but overlook attached addenda, schedules, or exhibits. Requiring a manual status update gives your team a built-in opportunity to review the returned file and verify that everything was signed correctly before the contract is officially closed out.

5. Managing Notes and "Hold Notes"

Putting a Contract on Hold

Sometimes negotiations stall or you need to wait on external factors before proceeding. When you change a contract's status to "Hold," adding a dedicated "Hold Note" provides a critical two-fold advantage:

- It creates a clear, timestamped record of the exact day the contract was paused.
- It explicitly conveys to any reader what the blocking issue is, so everyone remains aligned.

Editing Notes

The primary benefit of using notes is effortless communication. By consistently leaving notes on a Kanban Card, you proactively inform stakeholders of exactly what is happening with the contract — without them needing to track you down.

If the situation evolves or you spot a typo, you can update your entries at any time by clicking the edit button located next to the note. To maintain an accurate and accountable history, you may only edit your own notes — the system will not allow you to modify a note that someone else has left.

6. Settings & Preferences

The Contract Board includes a variety of user settings so you can tailor the interface to your personal workflow and visual preferences. Below is a complete list of available configurations.

Display & Accessibility

Setting	Description
Support for Visually Impaired Users	Significantly increases font sizes across the entire application (Large text mode).
Intermediate Enhanced Readability	Moderate increase of text size to enhance readability from the baseline (Medium text mode).
Compact Kanban Layout	Reduces padding on the main board. Ideal for smaller laptop screens.

Top Bar Configuration

Setting	Description
Show Full Date & Clock	Displays the current date and time in the top header bar.
Include Day of the Week	Adds 'Monday', 'Tuesday', etc. to the date display.
Minimalist Clock Mode	Hides the date and shows only the current time.

Kanban Card Options

Setting	Description
Emergency Borders	Highlights 'Emergency' contracts with a bold black border.
Show Dollar Value	Displays the financial value on the card (if greater than $0).
External Contact Names	Shows the primary point of contact for the other party directly on the card.
Quarterly Projection Icons	If a target completion quarter was entered, displays the target quarter on the card.
Notes Indicator	Displays a notepad icon if the contract has attached notes.
On-Hold Indicator	Displays a red stop sign if the contract is currently on hold.
Linked Contract Indicator	Displays a chain link icon if the contract is linked to another document.