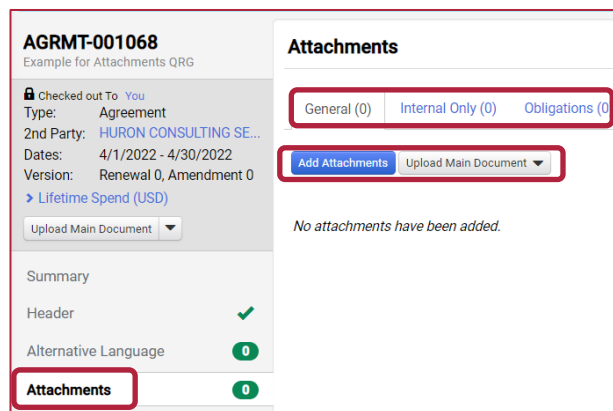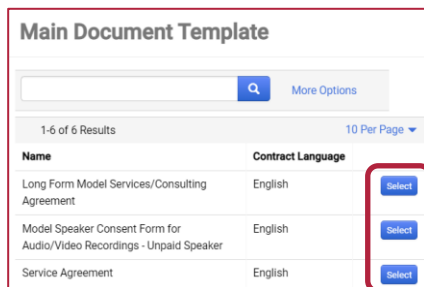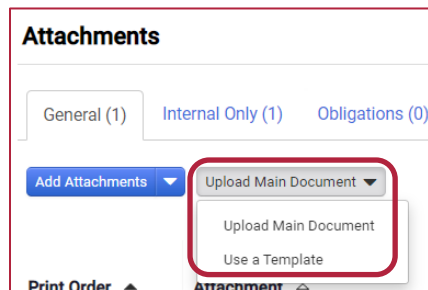# Contract Main Document and Attachments

This guide contains basic instructions for uploading the contract document and any other supporting documents. The Contract Manager uploads applicable documents to the contract record. Files (e.g., pdf, doc, docx, jpg, xls, ppt) can be uploaded at anytime.

1. From the contract record, click on the **Attachments** section. The contract document is the Main Document 👑 and will be uploaded or created on the General tab. Other Attachments can be uploaded on the General or Internal Only tab. If an Obligation was created with a document attached, it will appear on the Obligations tab.

2. To upload or create the Main Document, click Upload Main Document.

   • To use a preapproved template to create the draft contract document, select Use a Template. Available templates will display for selection. Not all Contract Types have templates and not all templates are available. The template selected will create the Main Document.

   • To upload a contract document created elsewhere, click Upload Main Document.
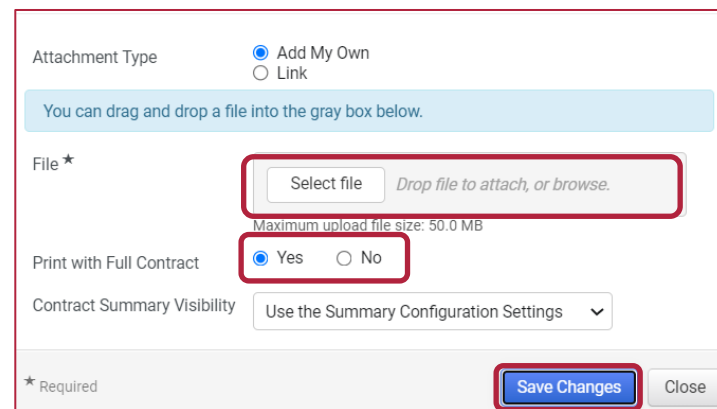

3. To upload a supporting document, click Add Attachments. For examples of supporting documents, refer to the Document Types for Indexing Resource.

4. When uploading a file, whether a Main Document or Attachment:

   • Leave Attachment Type defaulted to Add My Own.

   • For File, drag and drop or click Select file to locate and select the document.

   • If it is or will be part of the signed contract (e.g., Rider, Exhibit) leave Print with Full Contract set to Yes; if not, change to No.

   • Leave Contract Summary Visibility defaulted to Use the Summary Configuration Settings.

   • Click Save Changes.
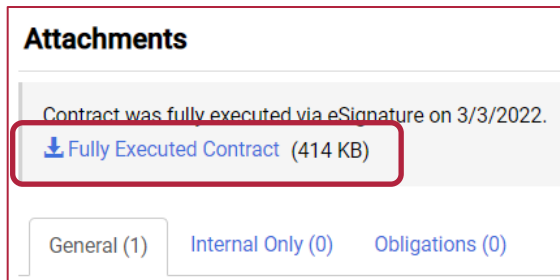

5. If needed, to restrict access to just the Contract Managers and Stakeholders listed under the Users and Contacts section of the contract record:

   • For an Attachment that isn't part of the contract, upload it or move it to the Internal Only tab.

   • For the Main Document or an Attachment that is part of the contract, refer to the Contract Record Visibility Quick Reference Guide.

Contract Main Document and Attachments

6. The fully signed Main Document may be downloaded by clicking on <u>Fully Executed Contract</u> (if signed via eSignature feature) or <u>Full Contract PDF</u> (if signed outside of B2P and uploaded after signature) at the top of the Attachments section.

   - It includes any Attachment (e.g., Rider, Exhibit) that Print with Full Contract was set to Yes.

   - The filename, when downloaded, reflects the Contract Name that was entered in the Header section of the contract record.

Attachments

Contract was fully executed via eSignature on 3/3/2022.

⬇ Fully Executed Contract (414 KB)

| General (1) | Internal Only (0) | Obligations (0) |

Contract Header

Contract Number ★	AMEND-003145
Contract Name ★	Mindtree - Amendment #1 of HBS Dev Staff Augmentation - HBSIT
Contract Type ★	Amendment

The **Search Contract Attachments** feature will return a list of files that contain the search keywords and/or other filters entered. Most file formats, but not all (e.g., tif, bmp), are searchable.

Contracts — Type to Search Contracts...

- Contracts
  - Contracts Home
  - Search Contracts
  - View Saved Searches
  - **Search Contract Attachments**
  - Create or Upload Existing Contract
- Approvals
- Libraries
- Reports