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Contract Management

Template Set Getting Started Guide

With the Contract Management template set, you can manage your contracts for different departments, track contract status, get notified when new contracts are submitted or about to expire, and get an overall view of all of your current contracts.

smartsheet.com
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Contract Management

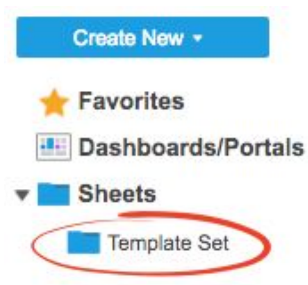
Template Set Getting Started Guide

REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. Click here to see a list of discontinued plans.

Get the Template Set

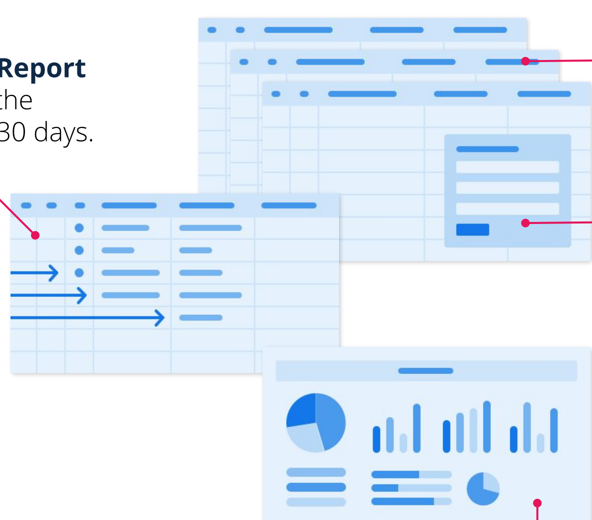
Click the link below and the template set will be added to your Sheets folder. You can find this folder on the left side of the screen under Sheets.

Contract Management Template Set



What's Included in the Set

With the Contract Management Template Set, you can manage your contracts for different departments, track contract status, get notified when new contracts are submitted or about to expire and get an overall view of all of your current contracts.



Contracts Expiring - 30 Days Report
Is a live filter that displays all of the expiring contracts upcoming in 30 days.

Contract Management Sheet (x3)
Tracks and maintains all of your contracts. Each department has it own sheet.

New Contract Form (x3)
Allows your team members to submit new contracts for each department.

Contract Rollup Sheet
A central repository that summarizes data on contract health and totals.

Contract Management Dashboard
IA dashboard that summarizes your contract values and statuses.

Contract Management

Template Set Getting Started Guide

Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

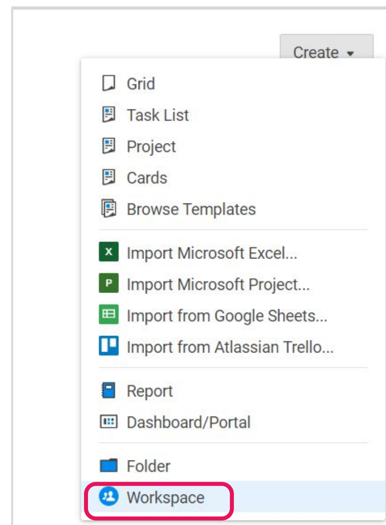
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

Workspaces Overview, Workspace Sharing, Home Tab



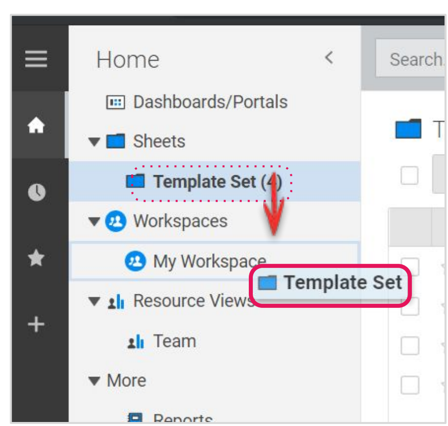
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

Manage Items in a Workspace (Add, Move, Remove)



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Contract Management

Template Set Getting Started Guide

Customize

Step 3:

Format Contract Management Sheets (x3)

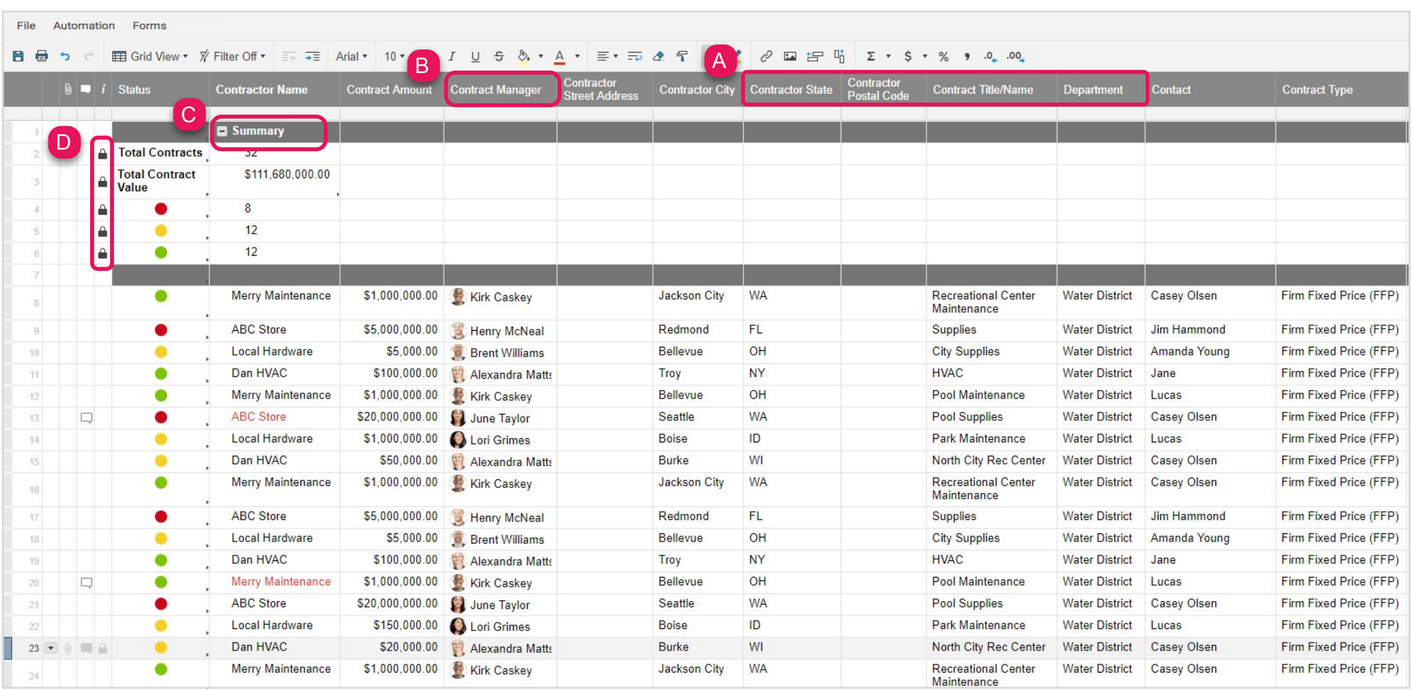
Use the Contract Management sheets to track and maintain all of your current contracts. You can keep record of contract status, key contacts, contractor information, key dates, and notes about the contracts.

A. Add or delete any columns to accommodate your team's unique process: right-click on any column and select *Edit column properties* or *Delete*.

B. Enter your team members' names in the *Contract Manager* column to make it easier for your team to assign the manager when using the form: click on the *Contract Manager* column header, select *Edit column properties*, and add the managers under *Values*.

C. The +/- sign next to Summary allows you to expand and collapse the summary section.

D. Summary Section rows are locked so that editors cannot accidentally change the formulas. The Length of Contract, Notify Days to Cancel/Renew, and Next Contract Review Date columns are also locked so that editors cannot accidentally change the formulas.



Learn more:

[Formulas & Functions](), [Locking & unlocking columns](), [Inserting, deleting & renaming columnsç]()

Contract Management

Template Set Getting Started Guide

Step 4:

Sheet Bonus: View or Edit Your Project Summary Data

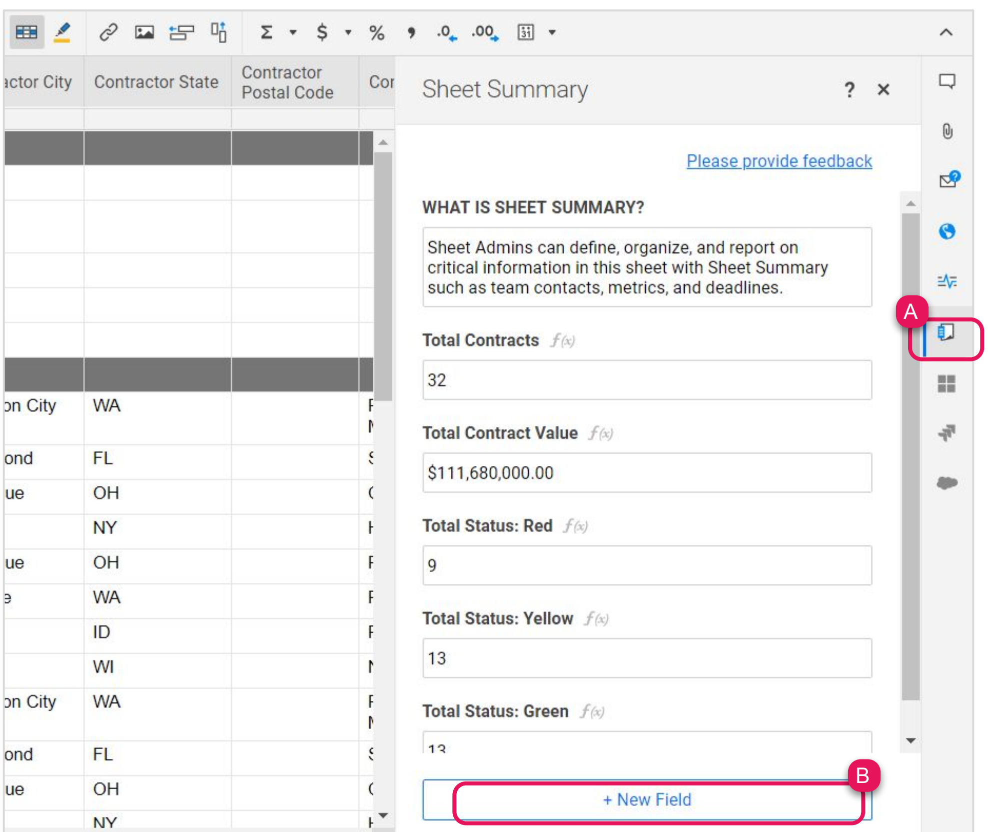
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. All of your Contract Management w Form sheets include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of total number of contracts, contract value, and contract status. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.



Learn more:

Define Your Work with Sheet Summary, Maximize Your Sheet Summary Usage, Create a Portfolio View with a Summary Report

Contract Management

Template Set Getting Started Guide

Step 5:

Modify the Contract Forms (x3)

The New Contract form is how people submit new contracts. Each Contract Management sheet is built with its own form, and when contracts are submitted they are added to the respective sheet.

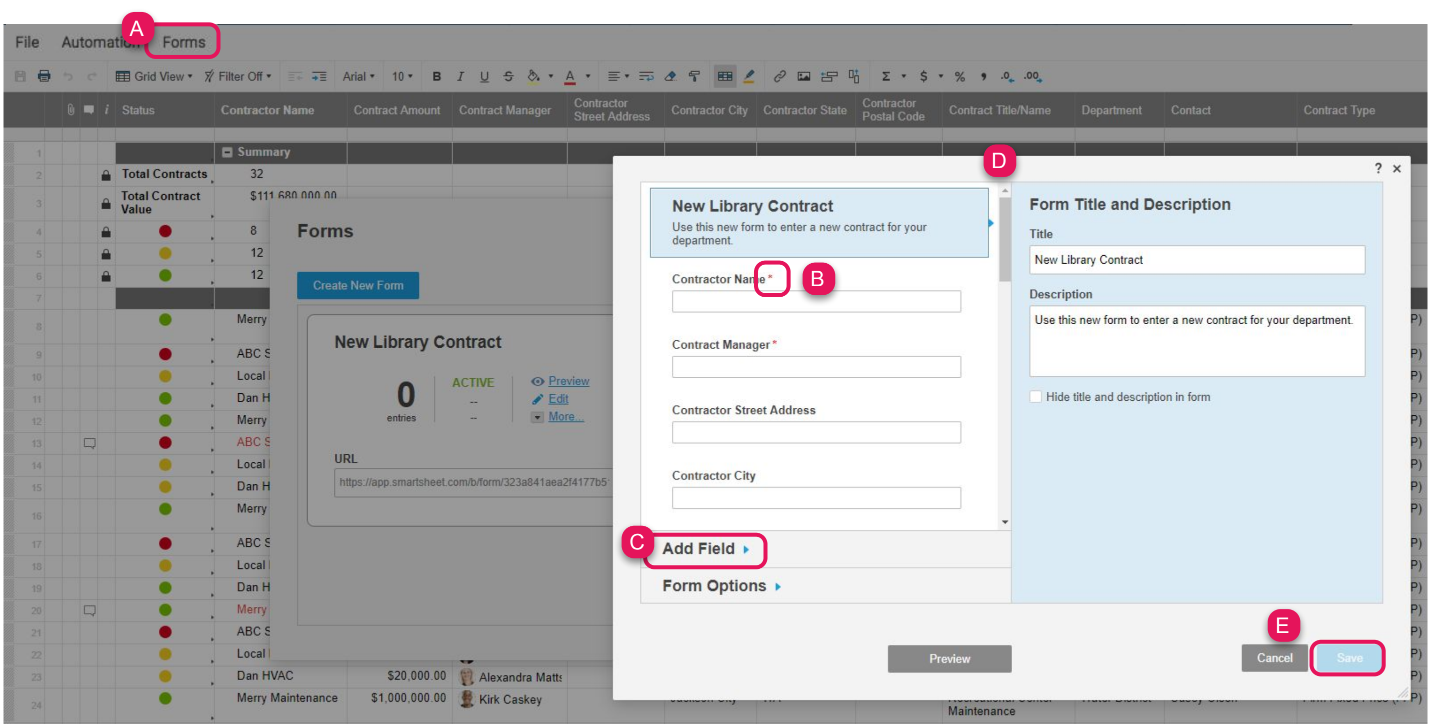
A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options.*

B. Mark fields as *Required Field* that you want to require contract managers to complete.

C. Click on *Add Field* to add a new field to your form. By adding a new field, you are also adding a new column to the Inspection Submissions sheet. Drag the field into the position where you want place your new field.

D. Set your form to be filled out by a *registered Smartsheet user* to ensure that the *Contract Manager* column is automatically populated.

E. Click *Save* to close the form builder and copy, and save the URL displayed. Give this URL to contract managers who will be submitting new contract forms. You can also share it via email, hyperlink, or embed it on a website or dashboard.



Learn more:

[Forms, Edit Existing Fields]()

Contract Management

Template Set Getting Started Guide

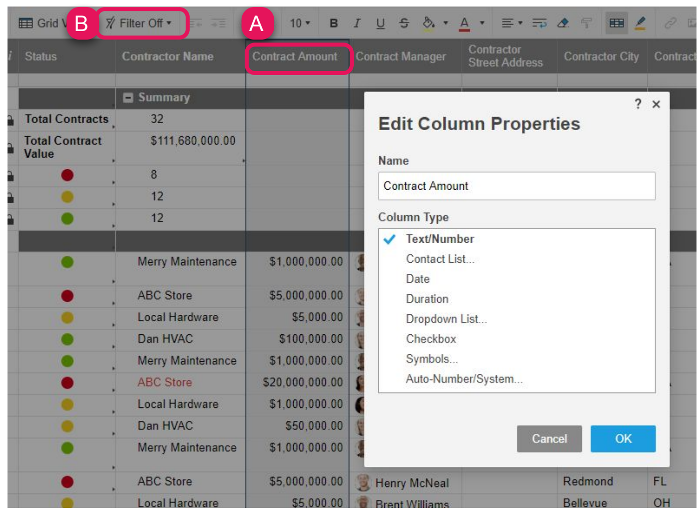
Step 6:

Update Contract Information and Use Filters

After a contract has been added to the sheet, people with editor permissions or higher can modify contract information in unlocked columns. Anyone viewing the sheet can create filters to see contracts that meet certain criterias. An example is to create a filter for contracts that each contract manager owns.

A. To modify column types and names, double-click on the column headers. To modify the options in the dropdown list, double-click on the *Contract Type* column header and edit the options under *Values*.

B. Select the *Filter Off* button in the toolbar to create, use or modify filters.



Learn more:

[Dropdown List](), [Filters](), [Shared Filter]()

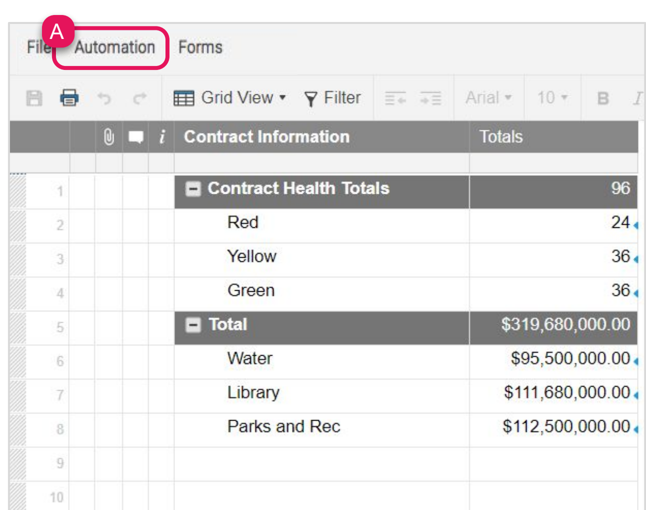
Step 7:

Set Automations

Automated workflows are a great way to keep track of changing information on your sheet. Each Contract Management sheet is set up with a reminder to notify the contract manager 30 days before a contract expires and an alert to the contract manager when a new contract assigned to them has been added or changed.

A. Modify the workflow by going to *Automation* and select *Manage Workflows* in the dropdown menu.

B. Then double-click on the workflow in order to open the editor window.



Learn more:

[Save Time and Work Faster With Automated Workflows]()

Contract Management

Template Set Getting Started Guide

Step 8:

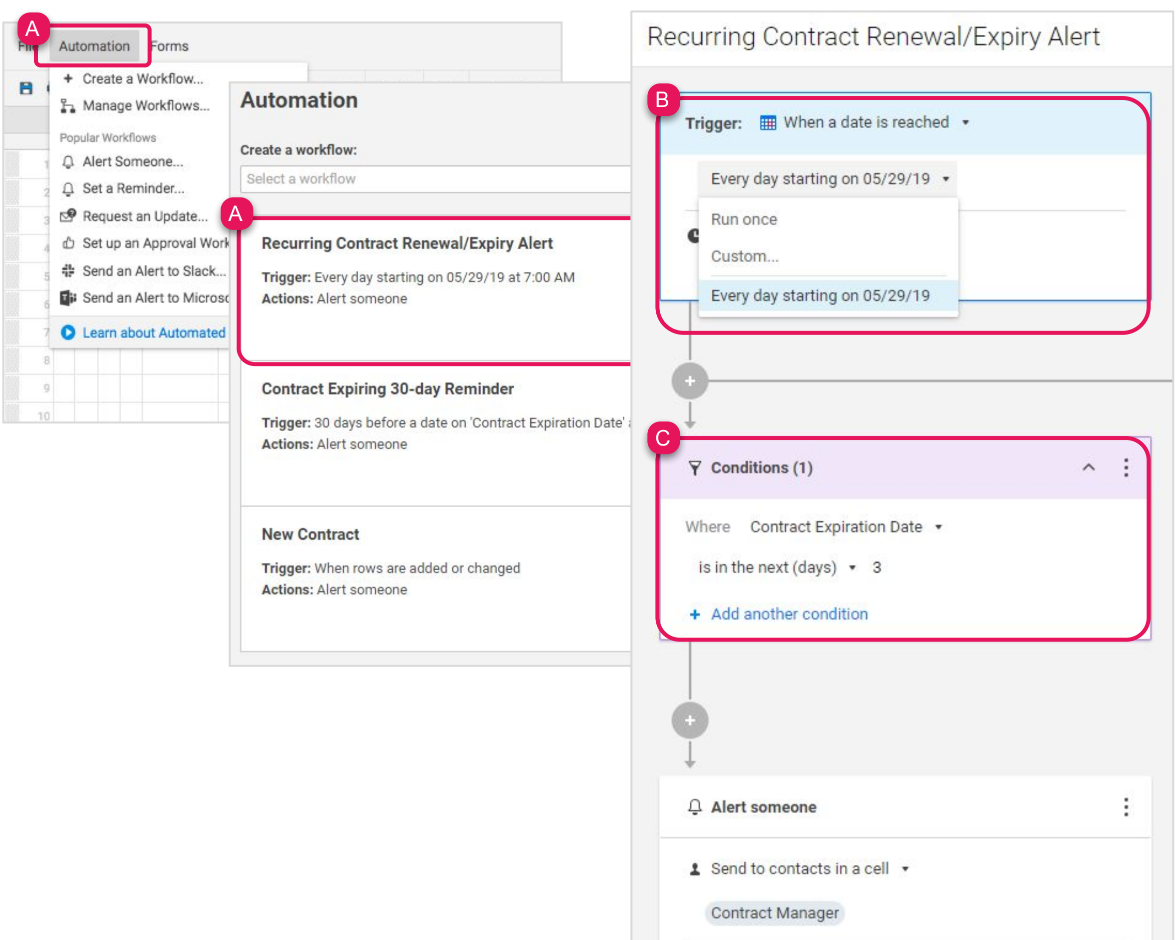
Recurring Reminder

An automated recurring reminder is a great way to save time and keep track of deadlines. The Recurring Contract Renewal/Expiry alert will notify the contact listed in the Contract Manager column every day when the Contract Expiration Date is in the next 3 days. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

A. Modify the reminder by going to *Automation* and selecting *Manage Workflows* in the dropdown menu. Then double-click on the workflow to open the editor window.

B. To customize the workflow's schedule (trigger box), click on the dropdown that begins with *Every day starting on* and select Run once to trigger on a single date, or choose Custom to edit the recurrence schedule.

C. Customize the workflow conditions (condition boxes) to add criteria and then click *Save.*



Learn more:

[Alerts & Reminders]

Contract Management

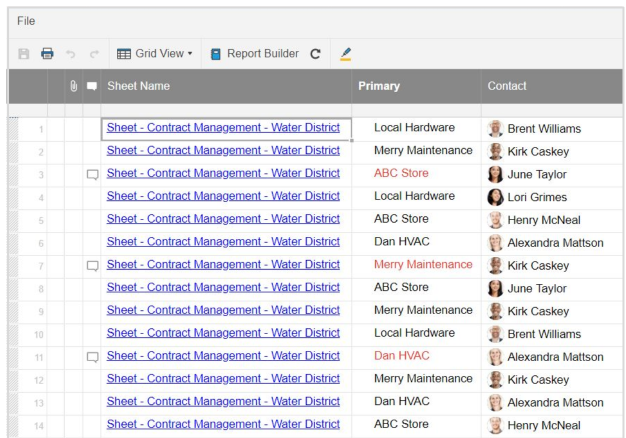
Template Set Getting Started Guide

Step 9:

Open Contracts Expiring - 30 Days report

Use reports to create cross-sheet filtered lists of the contracts that meet certain criteria. For instance, the Contracts Expiring - 30 Days report shows all contracts from your three Contract Management sheets for Library, Parks and Rec, and Water District that are currently expiring in 30 days. Reports are live, so as the contracts expiration date is updated, so will the data on the report. This report is surfaced in the Contract Management dashboard.

A. The report is already set up. If you want to make changes to the criteria or add another sheet used for the report, open the report and click on the Report Builder and set your criteria.



File

Grid View Report Builder

	Sheet Name	Primary	Contact
1	Sheet - Contract Management - Water District	Local Hardware	Brent Williams
2	Sheet - Contract Management - Water District	Merry Maintenance	Kirk Caskey
3	Sheet - Contract Management - Water District	ABC Store	June Taylor
4	Sheet - Contract Management - Water District	Local Hardware	Lori Grimes
5	Sheet - Contract Management - Water District	ABC Store	Henry McNeal
6	Sheet - Contract Management - Water District	Dan HVAC	Alexandra Mattson
7	Sheet - Contract Management - Water District	Merry Maintenance	Kirk Caskey
8	Sheet - Contract Management - Water District	ABC Store	June Taylor
9	Sheet - Contract Management - Water District	Merry Maintenance	Kirk Caskey
10	Sheet - Contract Management - Water District	Local Hardware	Brent Williams
11	Sheet - Contract Management - Water District	Dan HVAC	Alexandra Mattson
12	Sheet - Contract Management - Water District	Merry Maintenance	Kirk Caskey
13	Sheet - Contract Management - Water District	Dan HVAC	Alexandra Mattson
14	Sheet - Contract Management - Water District	ABC Store	Henry McNeal

Learn more:

[Reports]

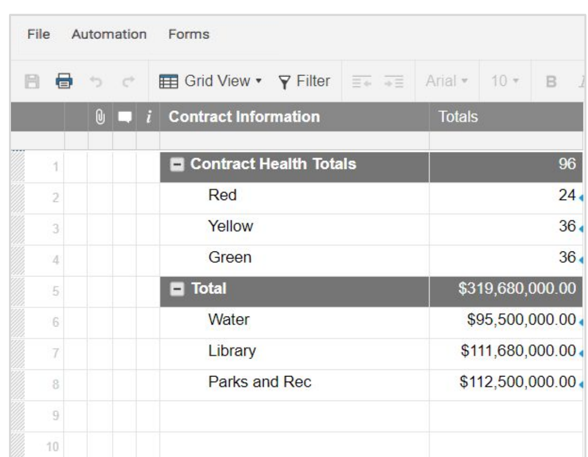
Step 10:

Review the Contract Roll-up sheet

The "Contract Roll-Up" sheet is a central repository where metrics you want to track across all contract management sheets are rolled-up. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real-time, the information in the underlying sheets.

A. Overwrite the categories under each section to match your dropdown lists in the "Work Order Requests" sheet. Replace the names of the assignees under the "Resource Metrics" section.

B. If you added new types in the "Work Order Type" column in the "Work Order Requests" sheet, insert a new row to the "Tasks by Work Order Type" hierarchy and copy the formula. The formulas will automatically recognize the work order type you enter in this section.



File Automation Forms

Grid View Filter Arial 10 B

	Contract Information	Totals
1	Contract Health Totals	96
2	Red	24
3	Yellow	36
4	Green	36
5	Total	$319,680,000.00
6	Water	$95,500,000.00
7	Library	$111,680,000.00
8	Parks and Rec	$112,500,000.00
9		
10		

Learn more:

[Cross-sheet Formulas]

Contract Management

Template Set Getting Started Guide

Step 11:

Update your Contract Management Dashboard

The Contract Management Dashboard is where you can get an overall view of all of your current contracts. Use it to track total contract values, statuses, contracts expiring in the next 30 days, and to access contract sheets and forms.

A. Click *Edit* in the upper left corner to begin customizing. Then hover over any widget and select the *pencil icon*.

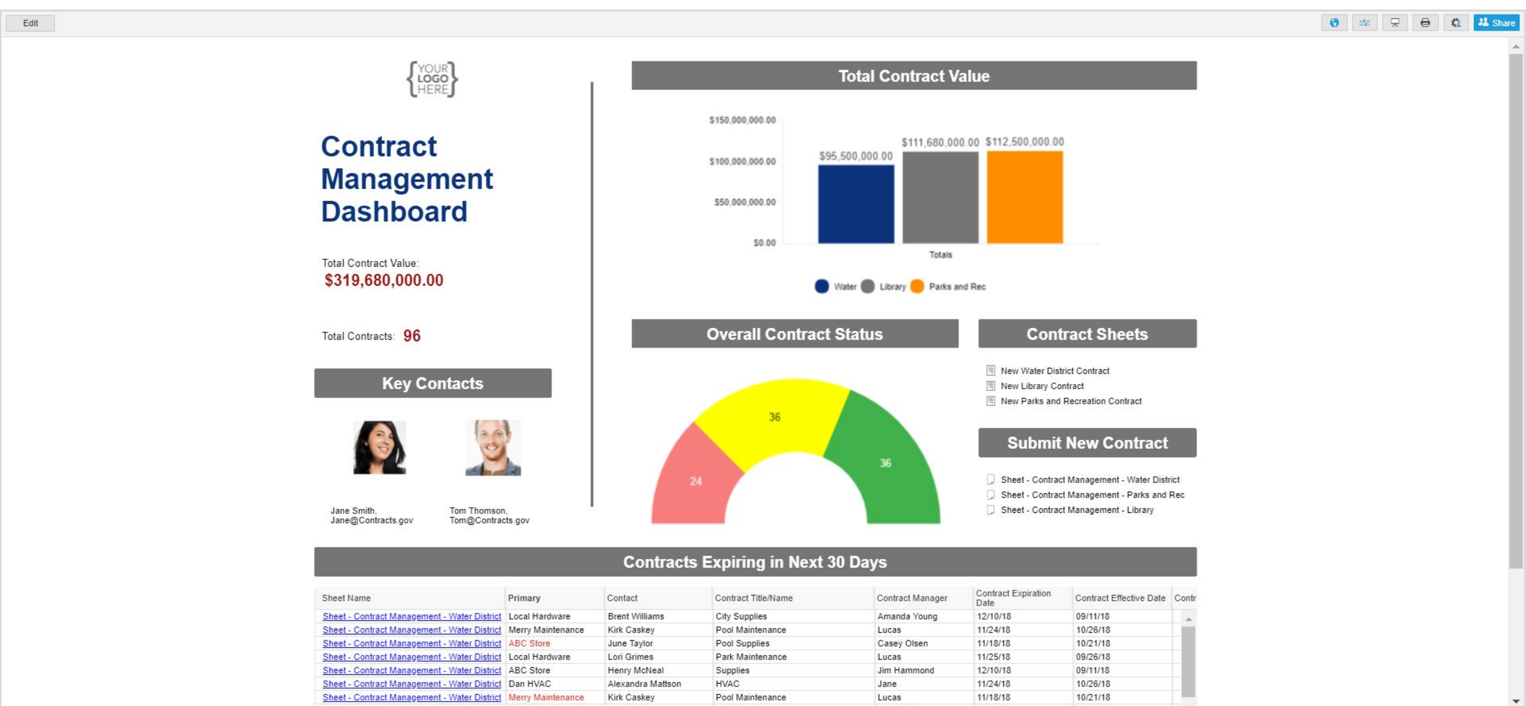
B. Replace the logo placeholder with your own logo in the *Image* widget.

C. The The Total Contract Value and Total Contracts are *Metric* widgets from the Contract Rollup Sheet.

D. The charts under Total Contract Value and Overall Contract Status are *Chart* widgets creating column and donut charts from the formulas on your Contract Rollup sheet.

E. Contract Sheets takes you directly to your Water District, Library and Parks and Rec sheets. Submit New Contract takes you directly to the form to submit a new contract for new Water District, Library and Parks and Rec contracts.

F. Contracts Expiring in Next 30 Days is a *Report* widget that displays the Report - Contracts Expiring - 30 Days.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

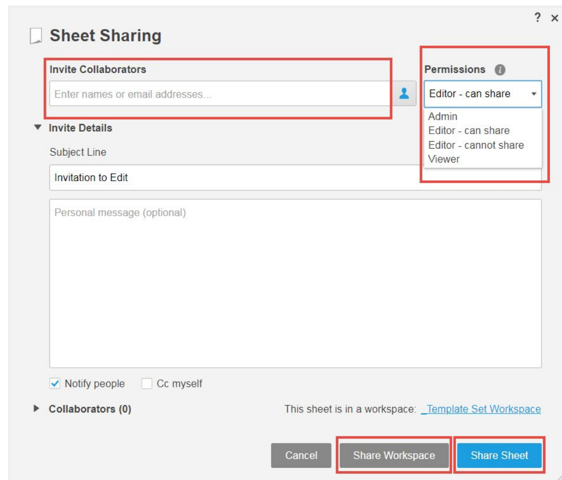
Contract Management

Template Set Getting Started Guide

Step 12:

Share your Contract Management Template Set

Sharing is the best way to collaborate with others involved in your contract management process. You can share your entire workspace with members of your department, or you can simply share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the Contract Management Template Set! Share your feedback **here**.