eDocs

Welcome to eDocs!

In this guide you will find the basics of how to access and use your eDocs account and how to create a contract.

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Accessing eDocs

Step one

Access the eDocs page through the MBA website using the orange button at the top of the webpage
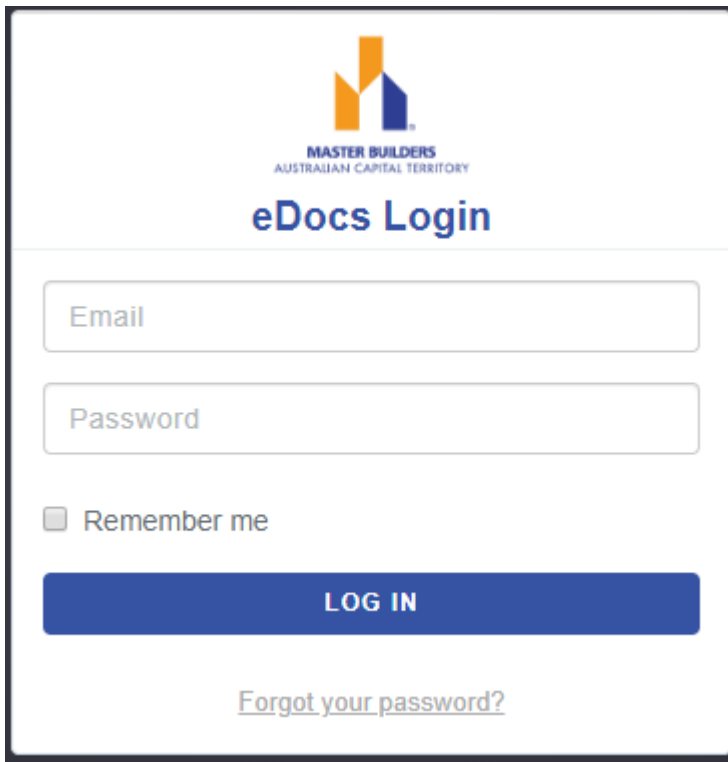

Step two

If you already have an eDocs login scroll down to the "**Click here to access eDocs**"

If you do not have a login please contact Kayla Gibbs at kgibbs@mba.org.au or 0261 755 944 and one will be created for you
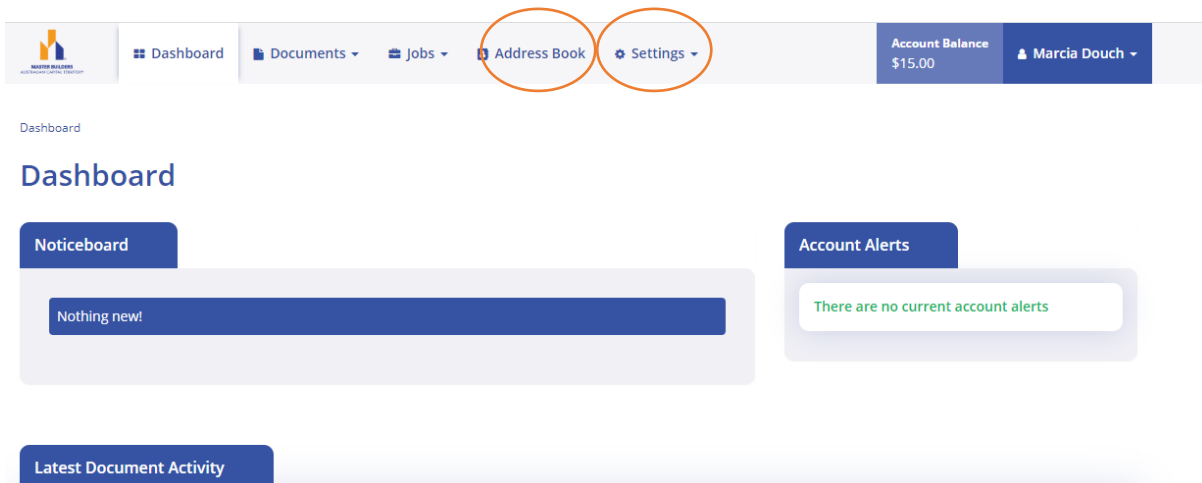
Step three: Login using your email and password

Setting up your account

When the login is created the business profile and the business contact is set up with the details that we have listed from the membership details on file. To see what details we have entered please go to the Address Book tab at the top of the webpage. To purchase credit or make changes to users please see Settings tab.

In the **Address Book** tab you can see the details that have been entered on behalf of your business.

- To make changes to the **Business Profile** information listed: click ▪▪▪, this will then give you the option to edit the information. Once you have clicked on edit you can make changes to

the information listed and even add a business logo. Once you are happy with the changes select **Save Profile** in the bottom right hand corner.

- The user is permitted two business profiiles: if you wish to add another profile you can click on **+ Create Business Profile** .

- You can also add subcontractors and clients into the address book
  - By adding in a **clients** details you can then use this to Autofill into the contract when entering party details

To **Add Credit** to your account:

- Go to the **Settings** tab at the top of the page and select "**Account & Transactions**"

- Click on the **Add Credit ▾** to add funds to your account and click "**Purchase Credit**"

- Click on the amount you would like to add to your account and then click the "**Next**" button down in the bottom right hand corner to proceed with payment

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To **Add Users** to the account:

- Go to the **Settings** tab at the top of the page and select "**User Management**"
- This is where you can see and edit the users that we have entered on your behalf
- To edit the details of the users or disable a user already listed click [···] next to their profile
- To create a user please click [**+ Create User**]

If **extra help** is required or you are experiencing issues:

- Please contact Kayla (02)61 755 944 <u>or</u>
- At the bottom of the eDocs webpage there is a link to "**Help Videos**"

Creating a contract

Step one- Finding the contracts section:

On your dashboard, go to the document tab at the top of the page and from the drop down menu select " Documents"
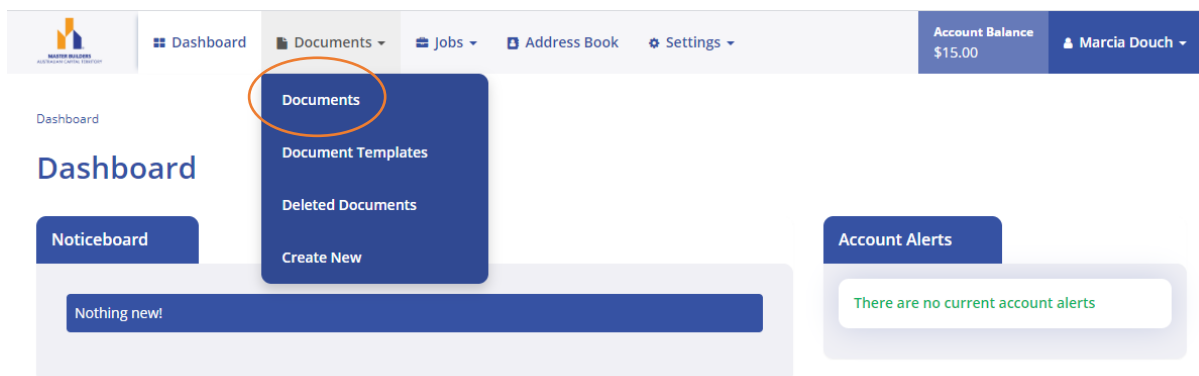
Step two- Selecting the contract**:**

- Select [**+ Create Document**]
- Select the contract you need

- Then select "**Next**" in the bottom right hand corner

Create Document   Cancel

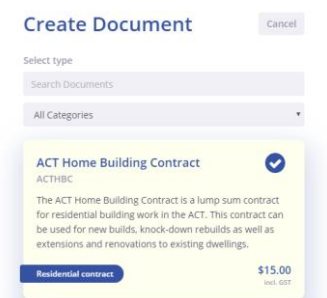Add information to the document.

Document
ACT Home Building Contract   Change

Document Name

Save to Job

Start typing to select a job...   ▼   [+]

Create this documents as:

Marcia

Your document will be created as a draft. You will not be charged until the draft is finalised.

← Back   Create Document

- Name the document (this is so you can find it easier later- we suggest the name/address of the project)
- Save to Job - you can create a job either by going to the "Job" section on the Dashboard or by selecting the "+" next to the drop down menu (this is not manadtory)
- Create this document as: This will automatically be set to the person who was originally marked down as the point of contact for the eDocs account. You can add in other users following the steps in this link : **Add Users**
- Click the "**Create Document**" in the bottom right hand corner

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Step three- Filling in the contract:

- Fill in all required fields of the contract
- Each step is listed on the left hand side, if there is an orange number listed next to a step this means it is a **required field** and you cannot proceed until completing this section
- You can track the progress of the document at the top
- When you have completed one step you can use the "**Next Step**" button in the bottom right hand corner to proceed through the contract
- When entering in: *Appendix A- Party Details*. In section A2 you can use the "**Use my Business Profile**" to automatically fill in the fields. You can edit your business profile using steps listed Business **Profile** . You can also do this for client details if you have added them into the address book as mentioned **clients.**

Step four- Purchasing the contract**:**

- When you are happy with the contents of the contract then proceed to "**Purchase**" the contract
- If you do not have enough credits to purchase the contract then please see **Add Credit**
- If you are ready for the contract to be signed please move on to the next step

Step five- Signing the contract

- Select the "Prepare for Signing" button in the bottom right hand corner

- Once you have selected your preferred method click the "**Next**" button in the bottom right hand corner
- Ensure the Signatories are correct- you can add sigantaories if needed by clicking the "**Add Signatory**" button. If correct, proceed by clicking the "**Next**" button
- You are now given the option to include what documents you would like to print/send with the contract. When happy with selection: click the "**Next**" button
- Confirm that the details are correct then click the "**Prepare For Signing**" button in the bottom right hand corner
- Please note at this point if you need to go back and make changes to the document you will need to click the "**Revoke Signing Request**"- the document will take you back to the purchased stage. *You will not be re-charged for the document*

- You can either **Print** or **Share** the contract to attain the necessary signatures
- To share the document, select the "**Sharing**" button

- This will then give you the option to "**Create Share Link**"

  - Click on the box that pops up- this will then open a notice box which will have the URL needed to send to the person you are sharing the document with
  - They will be prompted to enter their name and enter an email address

Step 6- Finalising the contract

- When you have the necessary signatures click the "**Marked as Signed**" button
- You will be prompted to confirm that you want to continue as you can no longer make changes once clicking Mark as Signed. After this point everything is read only
- Once you have marked as signed you can print or share the contract

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