



# Docs

# 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

The screenshot shows the top of the Master Builders website. On the left is the logo for Master Builders Australian Capital Territory. To its right is the text "For training bookings and enquiries call (02) 6175 5900". In the center, an orange button labeled "eDocs" is circled in red. To the right of the button are links for "Contact", "Keep Up to Date", "About MBA", and "Site Map", along with social media icons for Facebook, Twitter, YouTube, and LinkedIn. A search bar is located on the far right. Below the header is a dark navigation bar with the following menu items: TRAINING, EMPLOYMENT, MEMBERSHIP, EVENTS, CALENDAR, NEWS & MEDIA, CONSUMER ADVICE, and INDUSTRY RESOURCES. The main content area features a large banner for the "MASTER BUILDERS AND ASSET CONSTRUCTION HIRE Excellence Awards" with a graphic of a house frame. Below the banner is an orange button that says "Click here to enter now!". To the right of the banner is a "Course Finder" sidebar with dropdown menus for "Category" and "Type", a "Keywords" search field, and a blue "SEARCH" button.

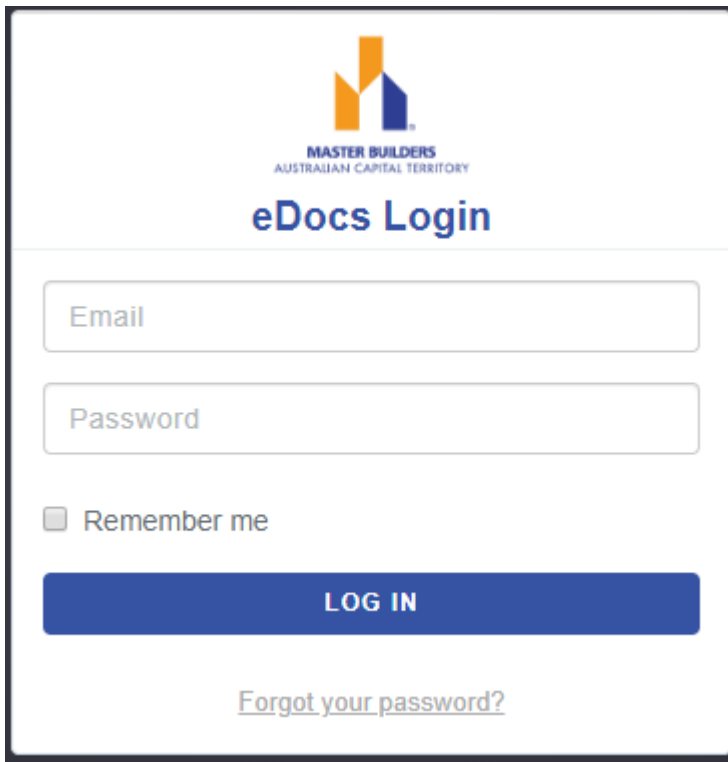
### Step two

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](mailto:kgibbs@mba.org.au) or 0261 755 944 and one will be created for you

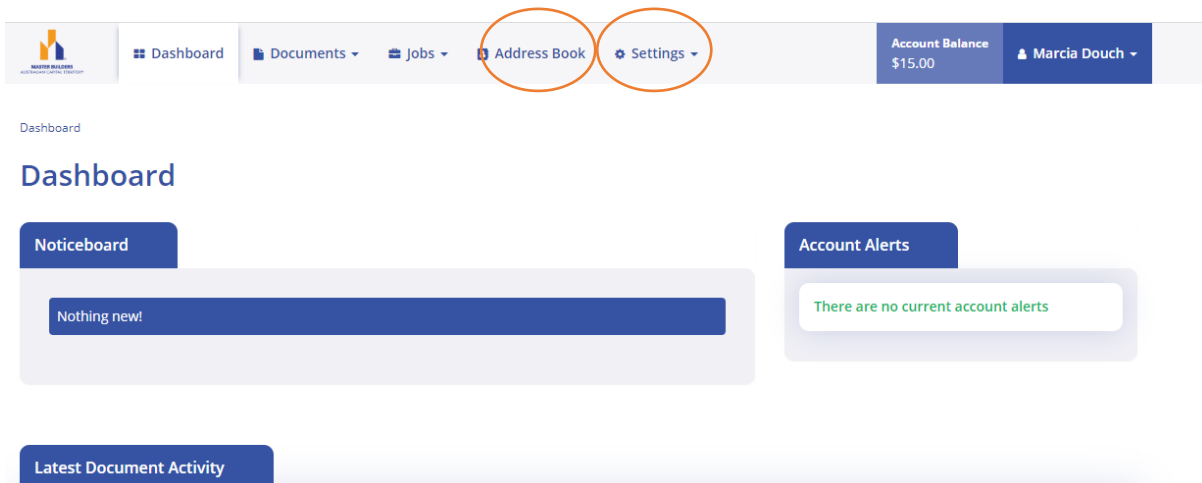
The banner features a blue background with a white computer monitor in the center. The text "Click here to access eDocs" is written in white above the monitor. Below the monitor is a white desk with a keyboard, mouse, and a white mug. At the bottom of the banner, the text "eDocs Login" is displayed in white on a dark blue background, followed by a white right-pointing arrow.

### 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 profiles: 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

**Credit Top-up** Cancel

Step 1 Choose amount    Step 2 Payment method    Step 3 Payment Confirmation    Step 4 Payment Result

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Current Account Balance    **\$66.00**

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Select a top up option



- \$20.00 for \$20 credit
- \$67.50 for \$75 credit (10% off)
- \$85.00 for \$100 credit (15% off)
- \$225.00 for \$300 credit (25% off)
- \$325.00 for \$500 credit (35% off)
- Custom amount

Powered by **stripe**

All credit top-up options are GST inclusive and will incur a transaction fee

**Next** →

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 

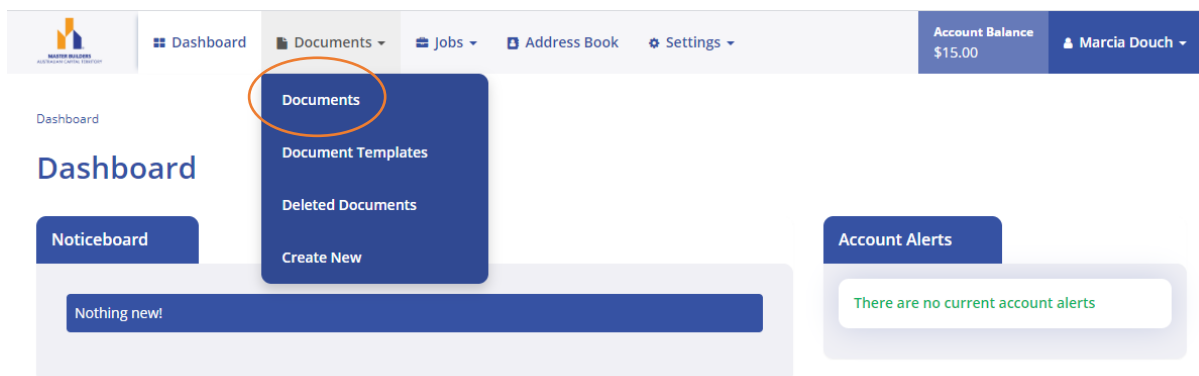
If **extra help** is required or you are experiencing issues:

- Please contact Kayla (02)61 755 944 or
- At the bottom of the eDocs webpage there is a link to **“Help Videos”**


## Creating a contract

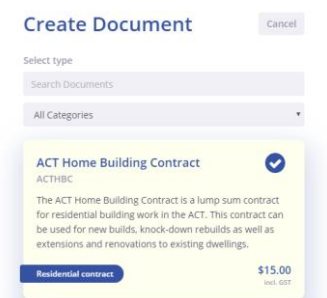
**Step one-** Finding the contracts section:

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 
- Select the contract you need



- Then select “Next” in the bottom right hand corner

The screenshot shows a 'Create Document' form. At the top, there is a 'Cancel' button. Below it, the text 'Add information to the document.' is displayed. The 'Document' section shows 'ACT Home Building Contract' with a 'Change' link. Three orange boxes highlight the following fields: 'Document Name' (an empty text input), 'Save to Job' (a dropdown menu with the text 'Start typing to select a job...' and a blue '+' button), and 'Create this documents as:' (a text input containing the name 'Marcia'). Below these fields, a note states: 'Your document will be created as a draft. You will not be charged until the draft is finalised.' At the bottom, there is a blue bar with a 'Back' button on the left and a yellow 'Create Document' button on the right. Three orange arrows point from the 'Create Document' button to the three highlighted fields.

- 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 mandatory)
- 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

### 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:

The screenshot shows a progress bar at the top with four stages: Draft, Purchased, Prepared for Signing, and Marked as Signed. The 'Draft' stage is highlighted in yellow. Below the progress bar is a 'Steps' sidebar with a search bar and a list of 11 items, with 'Finalise' at the bottom. The main content area is titled 'Purchase and prepare for signing' and contains the following text: '\*After purchasing your document, signature options will become available at the 'Prepare for Signing' step\*'. Below this is a disclaimer: 'If there is any doubt about the completion of this document, professional advice should be obtained. Members of Master Builders Association of the ACT may obtain free guidance from the association. Phone us on (02) 6175 5900.' A copyright notice follows: '© Copyright Master Builders Association of the ACT. All rights are reserved. No part of this publication may be reproduced, copied, stored in a retrieval system, distributed or transmitted in any form, or by any means, including photocopying, scanning or other mechanical or electronic methods without the prior written permission of the copyright holder.' The Master Builders logo is centered below the text. At the bottom left is a 'Previous Step' button, and at the bottom right is a 'Purchase - \$15.00' button, which is highlighted with an orange arrow pointing to it.

- 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

The screenshot shows the same progress bar as in Step four, but now the 'Purchased' stage is highlighted in orange. The 'Steps' sidebar remains the same. The main content area is titled 'Purchase and prepare for signing' and contains the same text as in Step four. At the bottom right, the 'Prepare for Signing' button is now highlighted in orange and has an orange arrow pointing to it from below.

- 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 signatories 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