

# Contractor Guide for Neighborly Software



Last Updated:

October 1, 2019

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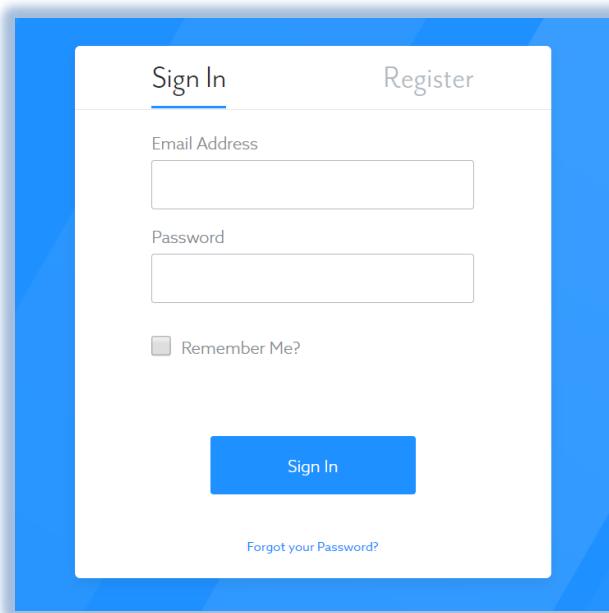
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## Getting Started

### Accessing the Contractor Portal

The Contractor Portal is hosted by Neighborly Software and is accessible via any internet connected device. The recommended browser is Google Chrome, but will work with any modern web browser (i.e. Internet Explorer v10+, FireFox, Safari).

**Contractor Portal Link:** <https://portal.neighborlysoftware.com/wilsonnc/Contractor>



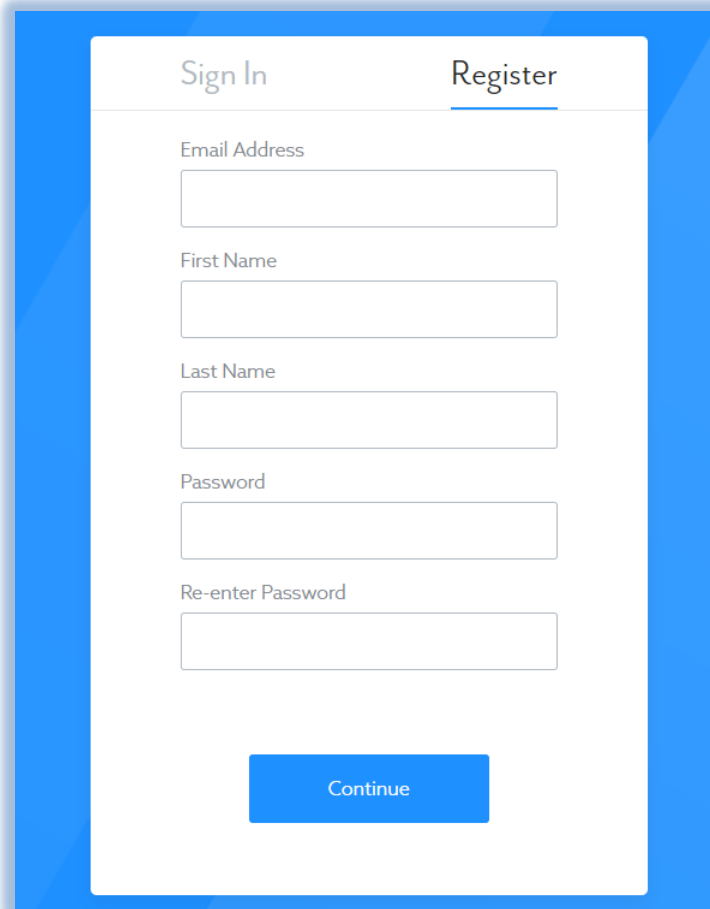
The image shows a screenshot of the Contractor Portal login page. The page has a white background with a blue border. At the top, there are two tabs: "Sign In" (which is underlined) and "Register". Below the tabs, there are two input fields: "Email Address" and "Password". Below the "Password" field, there is a checkbox labeled "Remember Me?". At the bottom of the form, there is a blue button labeled "Sign In". Below the button, there is a link that says "Forgot your Password?".

### Registering your Account

When you access the Portal for the first time, you'll need to Register your account by clicking on the Register link. The registration process will create a user name (which is your email address) and password that will be used for future logins. The email address you choose will also be used for system emails/notifications, so it is recommended to use your work email address. For security purposes, the system will validate that you own the registered email address by sending an email with a validation link.

**Note:** If you do not receive the system email within 2 minutes, check your spam or bulk mail folder. If the email appears in that folder, you should right click on the email to indicate "Not Junk" or "Not Spam" to ensure you receive any other system notifications. Occasionally, for new clients, we may

need to work with the IT/Email Administrator to ensure spam filtering does not inadvertently block valid system messaging.

A screenshot of a web registration form. The form is titled "Sign In" and "Register", with "Register" being the active tab. It contains five input fields: "Email Address", "First Name", "Last Name", "Password", and "Re-enter Password". A blue "Continue" button is located at the bottom of the form.

Sign In      Register

Email Address

First Name

Last Name

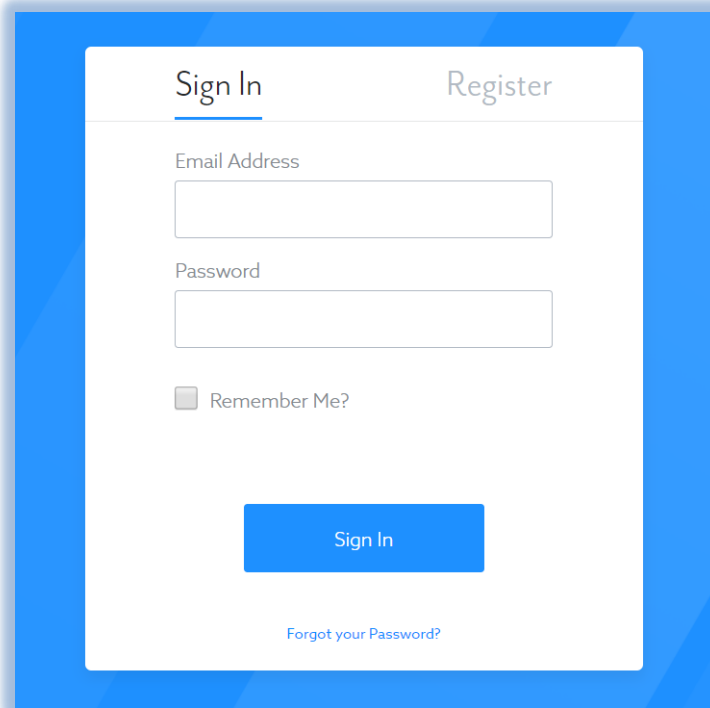
Password

Re-enter Password

Continue

### Logging In

Once your account has been registered, you may login (using the same link above) by entering the email address and password used during registration.




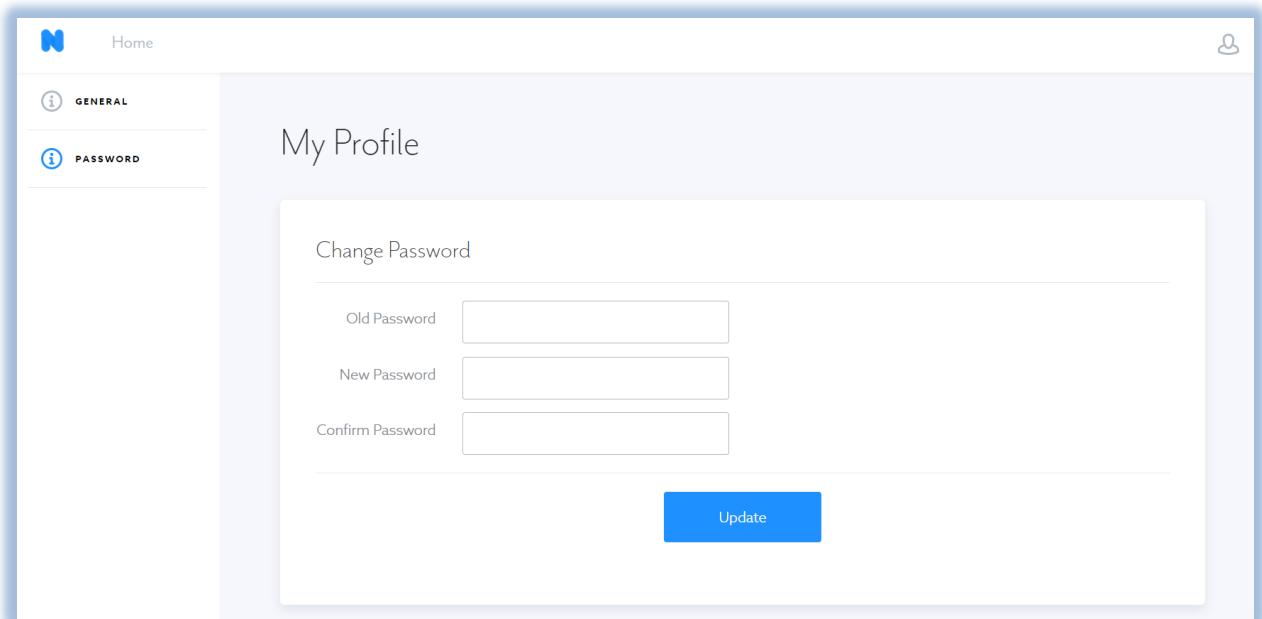
The image shows a login and registration interface. At the top, there are two tabs: "Sign In" (which is underlined) and "Register". Below the tabs are two input fields: "Email Address" and "Password". Under the "Password" field is a checkbox labeled "Remember Me?". At the bottom of the form is a blue "Sign In" button. Below the button is a link that says "Forgot your Password?".

### [Forgot your Password](#)

If you forget your password, click on the link at the bottom of the login screen that says “Forgot your Password?” and follow the prompts to create a new password. For security purposes, the system will send an email to the registered email address with a link to reset your password.


## [Changing your Password](#)

To change your password, log into the Contractor Portal. Click on the  icon on the top right corner of the screen, and select “My Profile”. Then select the Password option on the left side of the screen. For security purposes, you will be required to enter your Old Password before selecting a New Password.



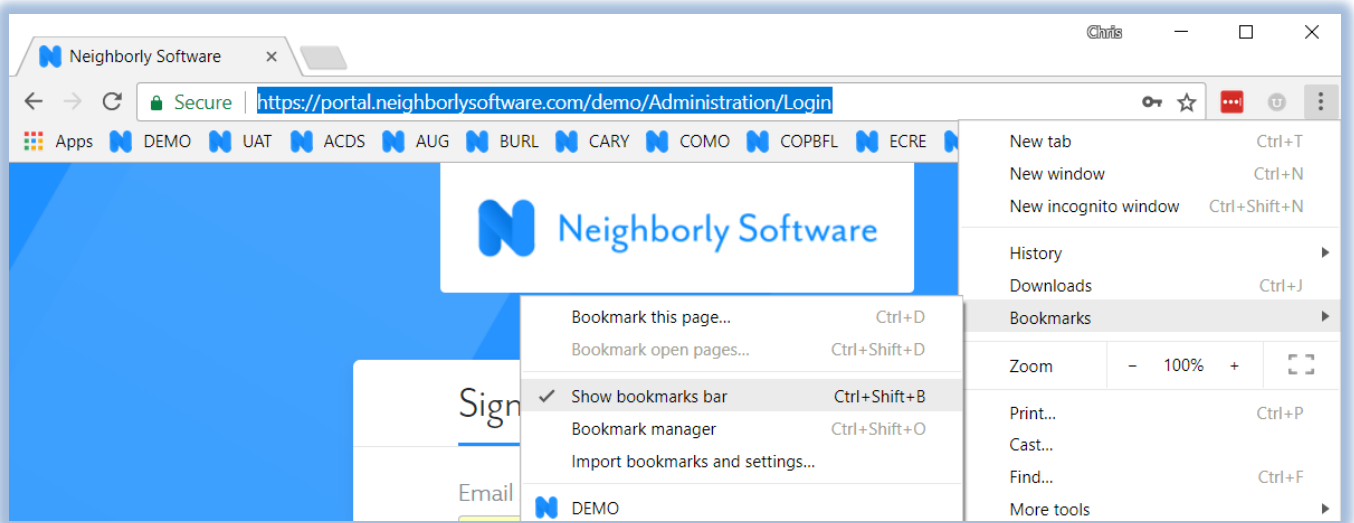
The screenshot shows the 'My Profile' page in the Contractor Portal. The page has a light blue header with the Wilson logo and 'Home' text on the left, and a user profile icon on the right. A left sidebar contains two menu items: 'GENERAL' and 'PASSWORD', with 'PASSWORD' selected. The main content area is titled 'My Profile' and contains a 'Change Password' form. The form has three input fields: 'Old Password', 'New Password', and 'Confirm Password'. Below the fields is a blue 'Update' button.

## [Signing Out](#)

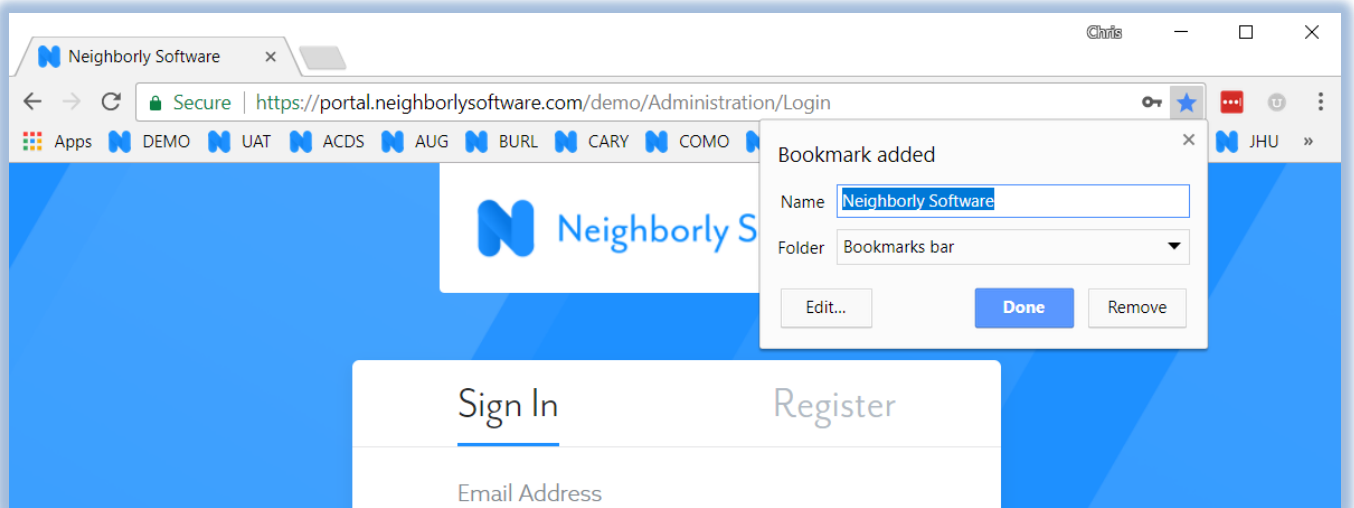
To sign out (aka log out) of the system, click on the  icon on the top right corner of the screen and select “Sign Out”. It is important to note that the system will automatically log a user out after 30 minutes of inactivity.

### Creating a Desktop Link (with Google Chrome)

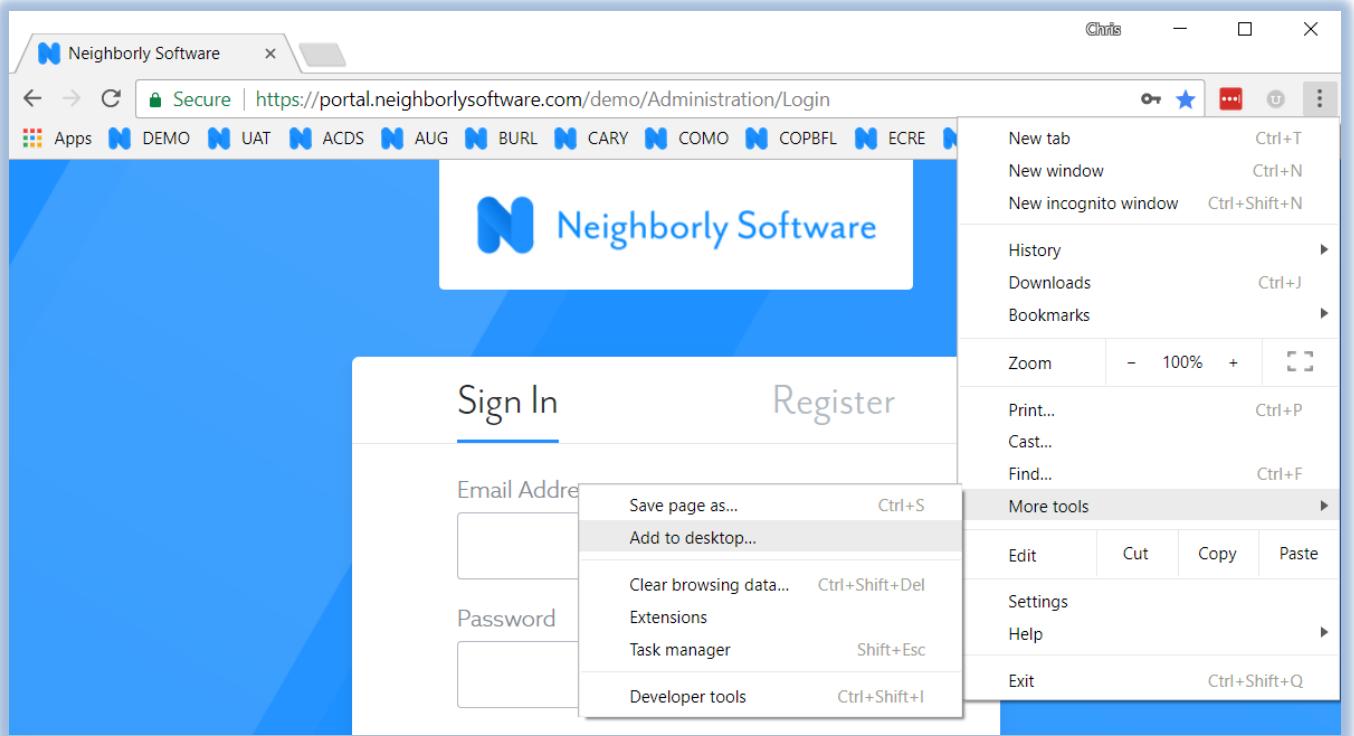
1. Launch Google Chrome (recommended browser for Neighborly Software)
2. Copy and Paste the Administrator Portal link into the Google Chrome navigation bar
3. Create a bookmark on the bookmarks bar
  - a. First, ensure your bookmarks bar is enabled: Click on the icon with the three vertical dots to the right of the navigation bar (see image below). Make sure Show bookmarks bar is checked.



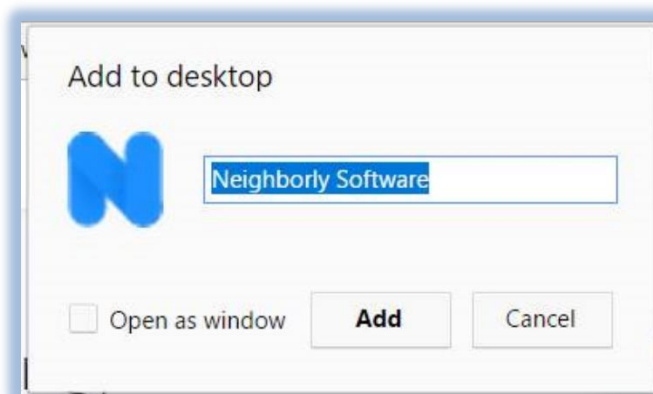
- b. Next, we'll create the bookmark: To the right of the navigation bar, click the star icon to create a new bookmark. Ensure the "Folder:" is Bookmarks bar.



4. Now we can create a desktop icon link to the application. Click again on the icon with the three vertical dots, but this time, highlight More tools and then Add to desktop:



5. You should see a popup box similar to below. Create a shortcut name and click Add. Once complete, the icon should appear on your desktop.



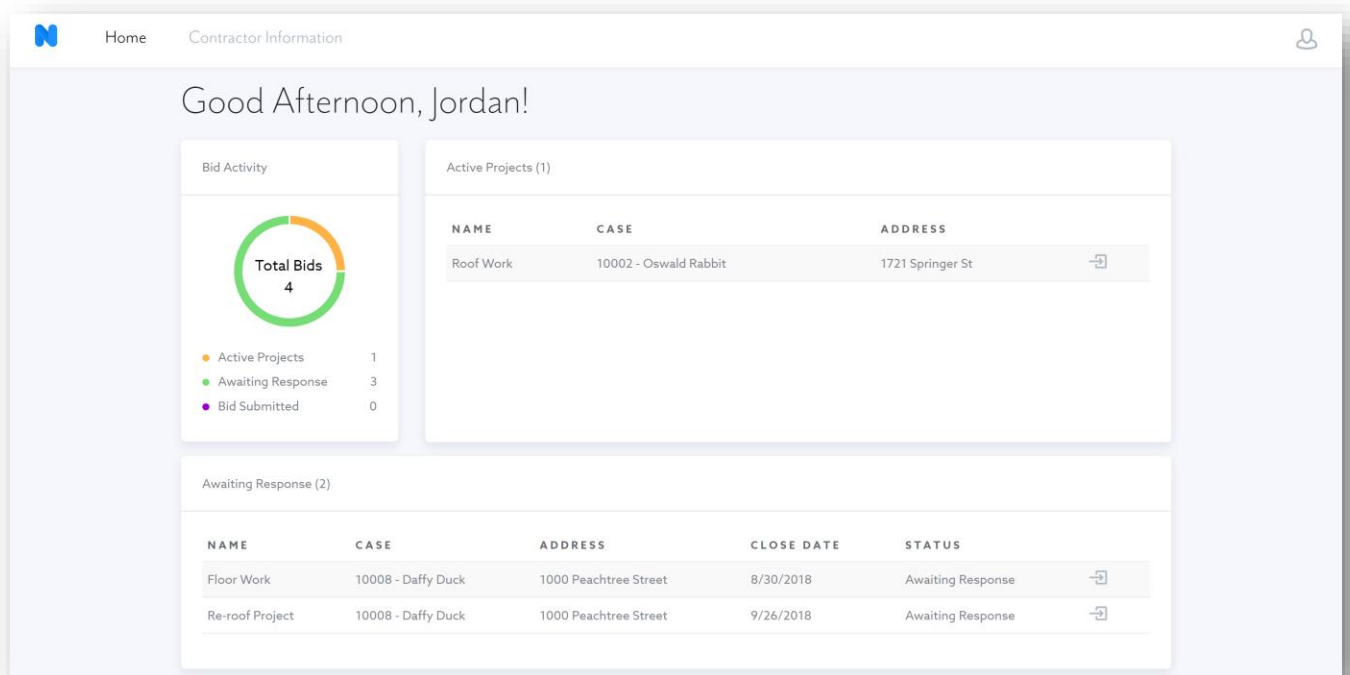


## Contractor Portal Dashboard

The dashboard provides an overview of all Open Bids, Active Projects, and access to Contractor Information.

### [Navigating the Portal](#)

Once you are logged in to the Contractor portal, you will be taken to the Dashboard. At the top of the screen is the Navigation Bar. The navigation bar is the primary way to navigate through the different modules in the portal. This navigation bar will be present throughout the system. You *\*cannot\** use the browser's back and forward buttons within the application. Rather, use the links within the tool to navigate forward and backward.



Screenshot: Dashboard

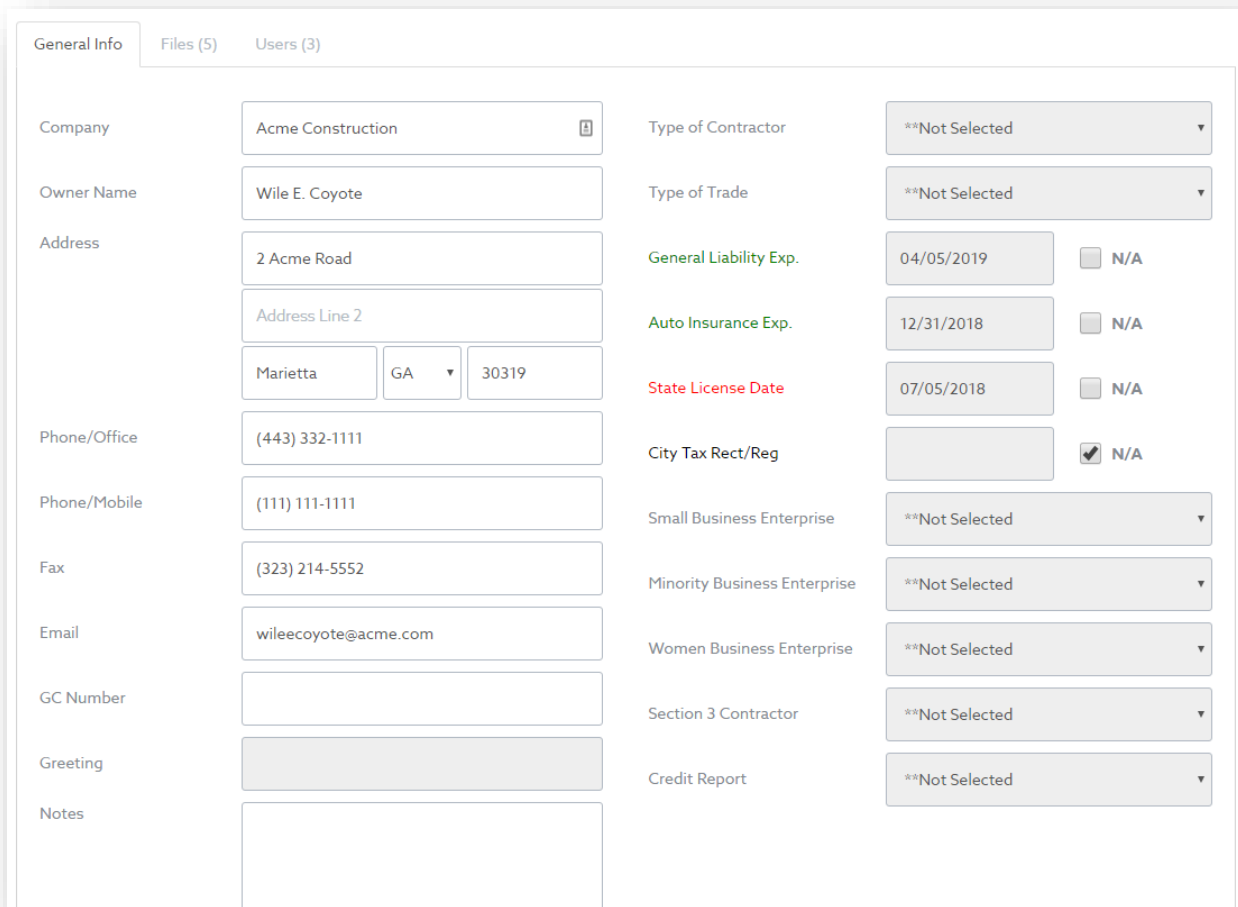
## Contractor Information Module

The Contractor Information screen serves as a primary location to manage all of your information with Wilson, NC.

By selecting the “Contractor Information” link from the Navigation Bar, you will have access to the Contractor Information screen. This is where you can manage your information, track and upload your Files (Insurance Documents, Tax Information, etc), and manage the users for your account.

### Managing and Editing General Contractor Information

The General Info tab is where you manage all your company information that has been requested by Wilson, NC. Once you upload the appropriate license or insurance files, the Wilson, NC Administrator will verify the documents and update the appropriate expiration dates in the system.



The screenshot shows the 'General Info' tab of the Contractor Information screen. It features a form with two columns of fields. The left column contains contact and identification information, while the right column contains business and compliance details. Each field is either a text input, a dropdown menu, or a date selector.






Field Name	Value	Field Name	Value
Company	Acme Construction	Type of Contractor	**Not Selected
Owner Name	Wile E. Coyote	Type of Trade	**Not Selected
Address	2 Acme Road	General Liability Exp.	04/05/2019 <input type="checkbox"/> N/A
	Address Line 2	Auto Insurance Exp.	12/31/2018 <input type="checkbox"/> N/A
	Marietta GA 30319	State License Date	07/05/2018 <input type="checkbox"/> N/A
Phone/Office	(443) 332-1111	City Tax Rect/Reg	<input checked="" type="checkbox"/> N/A
Phone/Mobile	(111) 111-1111	Small Business Enterprise	**Not Selected
Fax	(323) 214-5552	Minority Business Enterprise	**Not Selected
Email	wileecoyote@acme.com	Women Business Enterprise	**Not Selected
GC Number		Section 3 Contractor	**Not Selected
Greeting		Credit Report	**Not Selected
Notes			

### Uploading Files

Any files that you need to share with Wilson, or Wilson, NC needs to share with you can be found on the “Files” tab.

General Info | **Files (5)** | Users (3)

[Upload File](#)




FILE NAME	FILE SIZE	MODIFIED BY	LAST MODIFIED
 <a href="#">Acme-Certificate-of-Insurance.jpg</a>	143 kb	jason.rusnak@neighborlysoftware.com	05/19/2018 3:07 PM
 <a href="#">Acme Business License.jpg</a>	164 kb	jason.rusnak@neighborlysoftware.com	05/19/2018 3:08 PM
 <a href="#">Acme Auto Insurance.jpg</a>	8 kb	jason.rusnak@neighborlysoftware.com	05/19/2018 3:09 PM
 <a href="#">20170420_081849.jpg</a>	511 kb	jordan.behm@neighborlysoftware.com	07/31/2018 9:00 PM
 <a href="#">20170420_081849.jpg</a>	511 kb	jordan.behm@neighborlysoftware.com	08/01/2018 4:08 PM

### Adding Account Users

Additional users within your organization can be added on the “Users” tab. Once their User ID is entered (email), they can register their account in the Contractor portal by following the Getting Started Instructions outlined earlier in this Contractor Guide.

General Info | Files (5) | **Users (3)**

### Users

USER ID	NAME	TITLE
jordan.behm@neighborlysoftware.com	Jordan Behm	
chris.behm@neighborlysoftware.com	Chris Behm	
jason.rusnak@neighborlysoftware.com	Jason Rusnak	

[Add a User](#)

## Responding to Bids

From your Dashboard, you can view all Bid Solicitations that are “Open.” Click the arrow next to the bid solicitation to view the Bid Submission screen.

Awaiting Response (2)

NAME	CASE	ADDRESS	CLOSE DATE	STATUS	
Floor Work	10008 - Daffy Duck	1000 Peachtree Street	8/30/2018	Awaiting Response	→
Re-roof Project	10008 - Daffy Duck	1000 Peachtree Street	9/26/2018	Awaiting Response	→

## Reviewing Bid Information

On the top part of this screen you will see all of the general information about the project:

Action: Respond To Bid	Address: 1000 Peachtree Street
Project Name: Re-roof Project	Open Date: 08/01/2018
Case: Daffy Duck	Close Date: 09/27/2018

<p><b>SCOPE OF WORK</b></p> <hr/> <p>Tear Roof Down to the Deck Install new 2" insulation board Install 1/2" cover board Instal CertainTeed Platinum Shingle System Provide 30 year warranty</p>	<p><b>BID DOCUMENTS</b></p> <hr/> <p><a href="#">Instructions To Bid.docx (11k)</a></p>
--	---

Below the Bid Information you will see a section labeled “Bid Items.” This is where you can view the specific Work Items that have been specified for this project.

**BID ITEMS**

ROOF & ATTIC	QUANTITY	UNIT	PRICE
35.00750 INSTALL NEW RAFTERS <i>Remove defective rafters and install new rafters sized and installed to comply with building code requirements.</i>	<input type="text" value="0"/>	LF	<input type="text" value="\$ 0.00"/>
35.01000 FRAME-UP AND DECK NEW GABLE ROOF <i>Remove existing roof. Construct and tie a new gable roof into the building structure. Construction methods and materials to comply with building code requirements. Roof pitch match pitch of roof being replaced. Rafters to be at least 2" x 6" spaced 16" on center. Use at least 1/2" plywood or wafer board sheathing containing exterior glue. Stagger joints of sheathing and nail sheathing to rafters no less than 8" on center. Provide necessary gable end wall framing and sheathing. Eave and/or cornice detail to match detail found on house. Square foot area equals SF of area covered by roof.</i>	<input type="text" value="0"/>	SF	<input type="text" value="\$ 0.00"/>

**[Saving & Submitting a Bid](#)**

Once you have reviewed all of the pertinent bid information, you may enter the bid amounts next to each line item. If you have additional costs that are not included as a Work Write Up Item, you can include that pricing in the “Supplemental Information” section at the bottom of the bid form.

You can also upload any Supporting Documentation with your bid submission. This may or may not be required depending on Wilson, NC’s bid instructions.

Once you have completed your bid entry, you may either Save your work for later, or Save and Submit to finalize your submission. **Once you submit a bid, it can’t be re-opened.** Once the bid closing date is passed, no changes can be made to the proposed bid.

**BID ITEMS**


ROOF & ATTIC	QUANTITY	UNIT	PRICE
35.00750 INSTALL NEW RAFTERS <i>Remove defective rafters and install new rafters sized and installed to comply with building code requirements.</i>	<input type="text" value="0"/>	LF	<input type="text" value="\$ 0.00"/>
35.01000 FRAME-UP AND DECK NEW GABLE ROOF <i>Remove existing roof. Construct and tie a new gable roof into the building structure. Construction methods and materials to comply with building code requirements. Roof pitch to match pitch of roof being replaced. Rafters to be at least 2" x 6" spaced 16" on center. Use at least 1/2" plywood or wafer board sheathing containing exterior glue. Stagger joints of sheathing and nail sheathing to rafters no less than 8" on center. Provide necessary gable end wall framing and sheathing. Eave and/or cornice detail to match detail found on house. Square foot area equals SF of area covered by roof.</i>	<input type="text" value="0"/>	SF	<input type="text" value="\$ 0.00"/>

**SUPPLEMENTAL INFORMATION**

---

**Total** **\$ 0.00**

**SUPPORTING DOCUMENTATION**

[Upload File](#) 


Last modified by jordan.behm@neighborlysoftware.com on 8/10/2018 12:28:12 PM

Screenshot: Bid Submission

## Active Projects

If a contract has been awarded to your company, you will see it listed in the “Active Projects” section of the Dashboard. Click the arrow to view the details of the Project.

Active Projects (1)

NAME	CASE	ADDRESS	
Roof Work	10002 - Oswald Rabbit	1721 Springer St	

## Schedule of Values

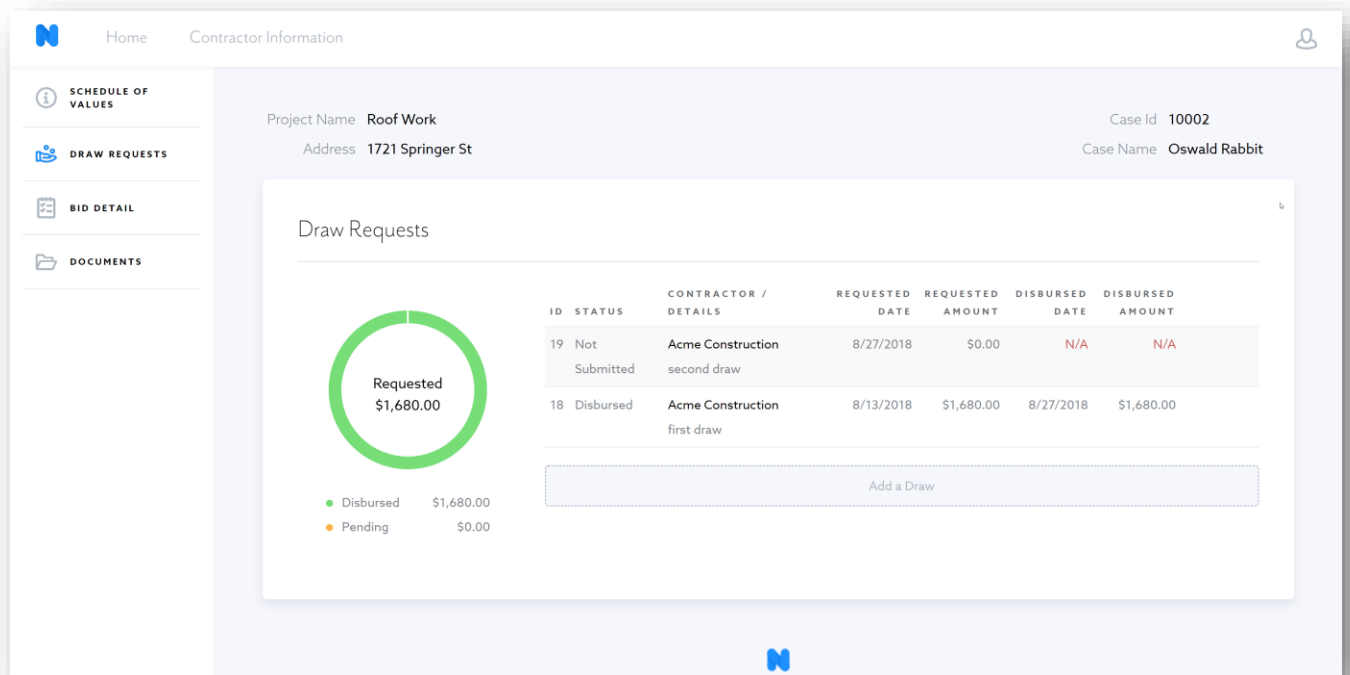
The first screen you will see when you access a Project is the Schedule of Values. These values have been set up by the Wilson, NC Administrator to track and manage construction progress and disbursements. You will use these scheduled values to create draw requests.

Schedule of Values

ITEM NO.	NAME	SCHEDULED AMOUNT	PERCENT COMPLETE	EARNED	RETAINAGE	EARNED LESS RETAINAGE	BALANCE REMAINING
1	General Conditions	\$180.00	100 %	\$180.00	\$18.00	\$162.00	\$0.00
2	Roof & Attic	\$2,900.00	52 %	\$1,500.00	\$150.00	\$1,350.00	\$1,400.00
3	Floors & Stairs	\$380.00	0 %	\$0.00	\$0.00	\$0.00	\$380.00
Totals		\$3,460.00	49 %	\$1,680.00	\$168.00	\$1,512.00	\$1,780.00

## Submitting Draw Requests

On the Draw Requests tab, you can request draws based on construction completion as well as view previous draw requests and their corresponding approval status. To create a new draw request, click on the “Add a Draw” button and follow the steps below.



ID	STATUS	CONTRACTOR / DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
19	Not Submitted	Acme Construction second draw	8/27/2018	\$0.00	N/A	N/A
18	Disbursed	Acme Construction first draw	8/13/2018	\$1,680.00	8/27/2018	\$1,680.00

1. Provide a brief description of the draw request.
2. Attach all required supporting documents for the draw request (e.g. invoices, receipts, timesheets). Note, you can add (upload) as many files to the draw request as necessary.
3. Assign the appropriate amount of money to each schedule of values that is included in the draw request. Note that the system will not allow you to request more money than what is available in the “Remaining Balance” column.
4. Click “Submit” to send the draw request to the Wilson, NC Administrator for review.

Once a draw request is submitted, you can track Wilson, NC’s approval process by clicking on the “Workflow” tab.



Home
Contractor Information

- SCHEDULE OF VALUES
- DRAW REQUESTS
- BID DETAIL
- DOCUMENTS

Project Name **Roof Work**

Address **1721 Springer St**

Case Id **10002**

Case Name **Oswald Rabbit**

[Draw Requests](#) > Draw Id: 20

Status	Not Submitted	Amount Requested	\$0.00
Date Requested	8/28/2018	Amount Approved	\$0.00

Request Workflow (0 of 3)\*

\*\*ACTION REQUIRED: This draw request has NOT yet been submitted. In the form below, provide a summary of the draw request, enter the amount requested by category, upload any supporting documentation, and then click Submit.

SUMMARY
DOCUMENTATION

Third Draw

[Upload File](#)

DETAILS

ITEM NO.	DESCRIPTION	TO DATE			THIS DRAW			
		SCHEDULED VALUE	CURRENT % COMPLETE	BALANCE REMAINING	AMOUNT REQUESTED	NEW % COMPLETE	RETAINAGE	EARNED LESS RETAINAGE
1	General Conditions	\$180.00	100 %	\$0.00		100 %		
2	Roof & Attic	\$2,900.00	52 %	\$1,400.00	\$ 0.00	52 %	\$ 0.00	\$ 0.00
3	Floors & Stairs	\$380.00	0 %	\$380.00	\$ 0.00	0 %	\$ 0.00	\$ 0.00
<b>Totals</b>		<b>\$3,460.00</b>	<b>49 %</b>	<b>\$1,780.00</b>	<b>\$ 0.00</b>	<b>49 %</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

Retainage to be released

\$ 0.00

Amount to be paid

\$ 0.00

Last updated by jordan.behm@neighborlysoftware.com on 8/28/2018 2:29:22 PM


Cancel


Submit





Screenshot: Draw Request

## Bid Detail

The “Bid Detail” tab provides an overview of your initial bid submission for this project. This is a read-only screen.


Home Contractor Information



-  SCHEDULE OF VALUES
-  DRAW REQUESTS
-  **BID DETAIL**
-  DOCUMENTS

Project Name **Roof Work**

Address **1721 Springer St**

Case Id **10002**

Case Name **Oswald Rabbit**

### Bid Detail

**PROJECT DESCRIPTION**

Tear Roof Down to the Deck Install new 2" insulation board  
Install 1/2" cover board Instal CertainTeed Platinum Shingle  
System Provide 30 year warranty

**BID DOCUMENTS**

[Roof Work \(Bid Complete\).docx \(24k\)](#)


[Instructions To Bid.docx \(11k\)](#)

**BID ITEMS**



GENERAL CONDITIONS	QUANTITY	UNIT	PRICE
<p>1.00250 PERMITS AND LICENSES</p> <p><i>Contractor shall obtain, pay for and post on site all permits and licenses necessary to complete this project. Contractor and subcontractors must have current licenses required by the State, County and City.</i></p>	0		\$ 180.00
<p>1.00500 CODE COMPLIANCE</p> <p><i>All materials and methods of construction related to work performed on this project must comply with locally adopted code requirements and must meet with the approval of local code enforcement officials.</i></p>	0		\$ 0.00
<p>1.00750 INSURANCE REQUIREMENTS</p> <p><i>The Contractor shall maintain such insurance as will protect him from claims for damages for personal injury, including death, which may arise from work performed on this project, whether such work be by himself or by any subcontractor or anyone directly or indirectly employed by either of them. Contractor shall present Program Administrator with certificate of insurance evidencing comprehensive public liability insurance coverage of</i></p>	0		\$ 0.00

## [Documents](#)

In the Documents tab, you can upload documents related to this project.

Documents [Upload File](#) 

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FILE NAME	FILE TYPE	LAST MODIFIED
 <a href="#">Payment Voucher10025.pdf</a> (55 kb)	Contract Document	chris.behm@neighborlysoftware.com 8/28/2018 8:21 PM
 <a href="#">file.txt</a> (0 kb)	Contract Document	jordan.behm@neighborlysoftware.com 8/29/2018 7:47 AM