

Managing Agreements and Compliance

User Guide 4 Creating Parties to an Agreement and adding Party Contacts

Overview

This User Guide provides instructions on how to create Parties to an Agreement in Plaza™ and add contact details for those Parties.

Plaza™ Terminology

Term	Definition and/or Example
First Party	Council, customer, or Contract Manager.
Second Party	Supplier, service provider, or contractor.
Third Party	Subcontractor, lawyer, auditor, financial institution, insurer, or client.
Owner	Account administrator who can allocate permission in Plaza™ and create new users for that account.
Agreement Creator	A user (Contract Manager) who can create an agreement in Plaza™ sets obligations, and performs assessments, etc. Unless you have acquired and paid for a licensed account, you will not have access to create or edit an Agreement.
Participant	User who is able to participate in Agreement, Party, Deliverable and Variation details
Observer	User who is able to view Agreement, Party, Deliverable and Variation details

Before creating/assigning a Party to your agreement, the Party should have an existing Plaza™ Account.

If they do not have an Account, you have a few options:

Where the Supplier/Organisation **will manage** their Account

1. If you anticipate the Party (supplier/organisation) **will manage** their own unlicensed account, send them the following URL <http://plaza.apetsoftware.com.au/> and invite them to create an account via the 'Add Organisation to Plaza' tile on the login screen. OR
2. You can create an unlicensed account for them and add a new User (a contact person who represents that Party). This will transfer ownership of this Account to the new User to maintain their new Account.

Where the Supplier/Organisation **will not manage** their Account

1. If you anticipate the Party (supplier/organisation) **will not manage** their own account, you can create an unlicensed account on the Party's behalf. You can act as an Authority over their account (i.e. manage their account and update their certification/deliverable details). OR
2. If there are multiple Accounts/Parties, please contact support@simplylogical.net for the relevant import templates.

Please refer to User Guide 2 – Configuration of an Account for detailed instructions on how to complete the above steps

It is useful to understand the different functions and filters accessible from the Parties menu (i.e. via the Parties link):



Figure 1 Parties Menu

Functions

- **Add** Add a new Party (discussed in detail below)
- **Show Deleted** Displays all Parties who have been deleted (then you have the option to hide deleted)
- **Download** Download Parties and their details into Excel

You can filter your view by selecting one of the following options:

Filters

- **Mine** Default view; Displays only the Parties who are linked to Agreements you own
- **Shared** Displays only Parties that you share an Agreement with

Create Parties to an Agreement

Parties in Plaza™ are legal entities directly involved or have an interest in any Agreement.

You can add Parties via:

1. Agreements tile or link, or
2. Parties tile or link, or
3. If you have multiple Parties to enter you can do so via the Parties import template – contact support@simplylogical.net

Via the Agreements tile or link

1. Click on the **Agreements** tile or the Agreements link in the top or bottom right-hand corners
2. **Select** your newly created Agreement from the list
3. Click **Add** and select **New Party** (Figure 2)
 - (To view existing Parties, click on **Parties** on the right hand side (Figure 2))



Figure 2 Select 'Add' or Select 'Parties'

4. Your **Agreement** will already be pre-selected
5. Select the **Level** or Role that this Party is going to play in the Agreement
6. Select whether or not the Party is the **Primary Contact** – while agreements with consortia have multiple parties, only one is primary
7. Select whether or not the party will have access to the Agreement via **Plaza Account Link**

- If you choose **Create link** and the Party **does** have an existing Plaza Account, their details will import and you'll have the option to synchronise their details from their Account
- If you choose **Create link** and the Party **does not** have an existing Plaza Account you'll have the option to add their Account details and the new unlicensed account will be under your ownership (see further details below)
- If you choose **Hide Agreement** from Account, and the Party **does** have an existing Plaza Account, their details will import but the option to synchronise their details from their Account will not be available. In addition, the Party will not be linked to an Account and not be able to view Agreement details. You can go back to this later and create a link to an existing account if you wish.
- If you choose **Hide Agreement** from Account, and the Party **does not** have an existing Plaza Account, the Party will be created but an Account won't be. It is only when you create the link will you have an option to create an Account on the Party's behalf.



*You can change from Hide Account to Create Link at any time, but you **cannot** hide an Agreement after you have created a link from Party to an Account.*



8. Add their **Legal Entity Name** by typing a new name or by selecting them from the prompt list as you type ahead
9. Click **Save** – Depending on the status Party you have just added one of two things will happen (i.e. if they have a Plaza™ Account or not) - as mentioned below.

*If the Party already **has a Plaza™** account:*

- You will have an opportunity to click on the **Synchronise** button to import the Account details across (details that were entered at the 'Create an Account' stage)
- The **Break Link** button will remove the relationship between the Party and the Account
- Add other relevant **details** and/or **attachments**
- Click **Save**

*If the Party **does not have a Plaza™** account:*

- You will be directed to enter the new **Party's details** (Trading Name, ABN, Address etc). As the creator of this new unlicensed account, you will have authority over this Account (until you hand over ownership – refer to User Guide 2 Configuration of an Account)
- Select whether you would like **details to be updated** automatically or not
- Click **Save**
- There is the option to 'Update details automatically'. By clicking on this radio button, you can **link that Party to a Plaza™ Account** (i.e. when the Plaza™ Account for that Party is updated, the changes will flow through).
- As the creator of that new Plaza Account, you can transfer ownership of that unlicensed account to the rightful User via Users.

10. Once those details are **added** and **saved**, click **Parties** to see all the Parties to the Agreement.
11. Add a Second or Third Party by repeating Steps 4-9 above.

Via the Parties tile or link

1. Click on the **Parties tile or link** in the top or bottom right hand corner
2. Click **Add** and select **New Party**
3. Select the **Agreement** that this Party will be linked to
4. Select the **Level** or Role (see Terminology above) that this Party is going to play in the Agreement
5. Select whether or not the party is the **Primary Contact** – while agreements with consortia have multiple parties only one is primary
6. Select whether or not the party will have access to the Agreement via **Plaza Account Link** (see details mentioned above)
7. Click **Save** – Depending on the status Party you have just added one of two things will happen (i.e. if they have a pre-existing Plaza™ Account or not) - as mentioned above.
8. Once those details are **added** and **saved**, click **Parties** to see all the Parties to the Agreement.
9. Add a Second or Third Party by repeating Steps 2-7 above.

Party Contacts

In order for a Party to have access to an Agreement, a Party Contact needs to be assigned to the Party. Navigate to Party Contacts via its tile on the Plaza™ home page or via the Party Contacts Link in the top and bottom right hand corners.

If you would like to add multiple Party Contacts, please contact support@simplylogical.net for the relevant import template.

Before creating a Party Contact, it is useful to understand the different functions and filters accessible from the Party Contacts menu (i.e. via the Party Contacts tile or link):



Figure 3 Party Contacts menu

Functions

- **Add** Add a new Party Contact (discussed in detail below)
- **Show Observers** Displays all Party Contacts who are assigned as an Agreement Observer (then you have the option to hide Observers, and only display Agreement Participants)
- **Show Deleted** Displays all Party contacts who have been deleted (then you have the option to hide deleted)
- **Download** Download Party contact details into Excel

You can filter your view by selecting one of the following options:

Filters

- **Mine** Default view; Displays contacts the Agreements your own
- **Shared** Displays contacts who you are associated with via an Agreement

Creating a Contact for a Party

To create a contact for a Party, you need to *Create a Party* first (instructions above).

You can create a Party Contact via:

1. Agreements tile or link, or
2. Party Contact tile or link , or
3. Parties tile or link, or
4. If you have multiple Parties Contacts to enter you can do so via the Parties Contacts import template – contact support@simplylogical.net

Via the Agreements tile or link

1. Click on the **Agreements** tile or the Agreements link in the top or bottom right-hand corners
2. **Select** your newly created Agreement from the list
3. Click **Add** and select **Party Contact** (Figure 4)
 - (To view existing Parties Contacts, click on **Part Contacts** on the right hand side of Figure 4)



Figure 4 Select 'Contacts'

4. Your **Agreement** will already be pre-selected
5. Select the **Party** the contact details will belong to
6. Adjacent to **Plaza User** is the option to select from existing Plaza™ User(s) linked to the Party. Select the appropriate User.
7. Select whether or not the Party Contact is the **Primary Contact**
8. Click **Save**
9. Select the **Role** this Party is going to play in the Agreement
10. Click the **Party Contacts** link in the top right hand corner to return to **Party Contacts** main menu, and select **Add** to add more contact details

Via the Party Contacts tile/link

1. Click on the **Party Contacts** tile or the Party Contacts link in the top or bottom right-hand corners
2. Click **Add** and select **New Party Contact**
3. Select the **Agreement** and **Party** the contact details will belong to
4. Adjacent to **Plaza User** is the option to select to select from existing Plaza™ User(s) linked to the Party. Select the appropriate User.
5. Select the **Role** this Party is going to play in the Agreement
6. Select whether or not the Party is the **Primary Contact**.
7. Click **Save**
8. Click the **Party Contacts** link in the top right hand corner to return to **Party Contacts** main menu, and select **Add** to add more contact details

Via the Parties link

1. Click on the **Parties** link in the top or bottom right hand corner
2. Click on the **name of the Party** you would like to add contact details for
3. Select '**Add Party Contact**' (option 1 in Figure 5) OR select **Contacts** on the right hand side (option 2 in Figure 5)

Party: Ange's Account

Agreement: Cafeteria fit-out

Save
Add
Delete

Agreement: [Details](#) | [Parties](#) | [Party Conta](#)

Plaza Account: [Details](#) | [Users](#) | [Certificates](#) |

Party: Details | [Contacts](#) | [Assigned](#)

Plaza account link:

Legal entity name:

Trading name:

Division/Department:

Level:

Owns agreement:

Primary at level:

No. of contacts:

Linked to Plaza Account: Ange's Account

Synchronise
Break Link

Update details automatically Do not auto-sync

Ange's Account

Ange's small business

First Party Second Party Third Party

Not owner

First point of contact Not primary

1

Add Party Contact
1. Select, or

2. Select

Figure 5 Select 'Add Party Contact' or 'Contacts'

Via 'Add Party Contact'

4. The **Agreement** and **Party** will be pre-selected
5. Adjacent to **Plaza User** is the option to select from existing Plaza™ User(s) linked to the Party. Select the appropriate User.
6. Select the **Role** this Party is going to play in the Agreement
7. Select whether or not the Party is the **Primary Contact**
8. Click **Save**
9. Click the **Party Contacts** link in the top right hand corner to return to **Party Contacts** main menu, and select **Add** to add more contact details

Via 'Contacts'

4. Click **Add** and select **Party Contact**
5. The **Agreement** and **Party** will be pre-selected

6. Adjacent to **Plaza User** is the option to select from existing Plaza™ User(s) linked to the Party. Select the appropriate User.
7. Select the **Role** this Party is going to play in the Agreement
8. Select whether or not the Party is the **Primary Contact**
9. Click **Save**
10. Click the **Party Contacts** link in the top right hand corner to return to **Party Contacts** main menu, and select **Add** to add more contact details