

Managing Agreements and Compliance

User Guide 5 Adding Deliverables to an Agreement

Overview

This User Guide provides instructions on how to establish Deliverables to an Agreement in Plaza™. Deliverables in Plaza™ are the formal commitment(s) as agreed by both/all Parties (i.e. tasks, compliance requirements, and other scheduled items).

Now an Agreement has been created, Deliverables can be assigned.

Navigate Deliverables by selecting the Deliverables tile or link.

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

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

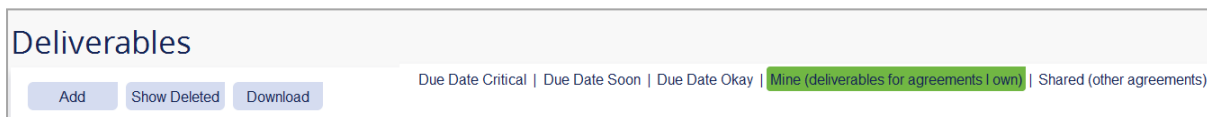


Figure 1 Deliverables menu

Functions

- **Add New** Manually add a new Deliverables (discussed in detail below)
- **Show Deleted** Displays all Deliverables that have been deleted (then you have the option to hide deleted)
- **Download** Download Deliverable details into Excel

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

Filters

- **Due Date Critical** Displays the Deliverables which are due
- **Due Date Soon** Displays the Deliverables which are due soon
- **Due Date Okay** Displays the Deliverables which are not due yet
- **Mine** Default view; Displays only the deliverables assigned to Agreements you own
- **Shared** Displays only Deliverables that you share with other Parties to an Agreement

Adding Deliverables

You can add Deliverables via:

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

Via the Agreements tile/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 on **Deliverables** on the right hand side (Figure 2)



Figure 2 Select 'Deliverables'

4. Click **Add** and select **New Deliverable**
5. The **Agreement** will already be pre-selected
6. Select the **Responsible Party**
7. Add the **Clause, Title** and **Description**
8. Click **Save**
9. Now you can add more **specific details** (type, status, active or not, dates, attachments) about the Deliverable
10. Click **Save**
11. If you would like to add another deliverable to an Agreement, Click **Add** and repeat steps 2-10.
12. Click the **Deliverables** link in the top right hand corner to return to the main Deliverables view

Via the Deliverables tile/link

1. Click on the **Deliverables** tile or the Deliverables link in the top or bottom right-hand corners
2. Click **Add** and select **New Deliverable**
3. Select the **Agreement**
4. Select the **Responsible Party**
5. Add the **Clause, Title** and **Description**
6. Click **Save**
7. Now you can add more **specific details** (type, status, active or not, dates, attachments) about the Deliverable
8. The Red warning date sends a message advising that the Deliverable is late
9. The Amber warning date sends a message advising that the Deliverable is due soon
10. Click **Save**

11. Click the **Deliverables link** in the top right hand corner to return to the main Deliverables view

Via the Accounts tile

Because Deliverables are linked to a responsible Party (and those Parties are linked to Accounts), deliverable details can be added via the Accounts tile from the My Account link.

1. Click on the **Plaza Accounts** tile
2. Select the **Account** that will be responsible for this deliverable
3. Select **Deliverables** on the right hand side (Figure 3)



Figure 3 Select 'Deliverables'

4. Click **Add** and select **New Deliverable**
5. Select the **Agreement** the deliverable will be assigned to
6. Select the **Responsible Party**
7. Add the **Clause, Title** and **Description**
8. Click **Save**
9. Now you can add more **specific details** (type, status, active or not, dates, attachments) about the Deliverable
10. Click **Save**
11. Click the **Deliverables link** in the top right hand corner to return to the main Deliverables view