

**CUSTOMER INSTRUCTIONS FOR PROPRIETARY WEBSITE BASED CONTRACT MANAGEMENT SYSTEM**

**CONSTITUTION RISK MANAGEMENT SERVICES**

As part of its risk management services, Constitution Risk has provided certain contract documents, including contractual terms and conditions with state specific risk management language for your use. These instructions will help you understand how to implement these contract documents in your daily work flow and operations.

**INCORPORATION CONCEPT**

- Your daily work has been and will be driven by the daily work ticket. You also communicate with your customers and potential customers through email proposals and/or acceptances and through other documents, such as quotes or bid package responses.
- As you know, the work ticket format, as well as other customer communication, does not provide much room for including important contractual language to protect your interests.
- Through the simple system described below, you will be able to maintain a traditional work flow, but still incorporate important contractual terms that serve to protect your business.

**INCORPORATION METHOD**

- This protection is accomplished by placing the provided terms & conditions and/or other contract documents on your website and adding simple incorporation language to your work tickets, your emails, your quotes and bid responses.
- This language serves to advise your customers that your work is subject to the terms and conditions posted to your website. (The sample work tickets provided or made available to you already contain this type of language.)

**EXAMPLE INCORPORATION LANGUAGE**

ALL WORK, QUOTES, BIDS OR OTHER AGREEMENTS SHALL BE SUBJECT TO THE TERMS AND CONDITIONS FOUND AT URL: \_\_\_\_ [insert web address] \_\_\_\_ . THESE TERMS AND CONDITIONS OF CONTRACT SHALL PREVAIL OVER ANY INCONSISTENT CONTRACT DOCUMENTS, INCLUDING ANY PURCHASE ORDERS. CUSTOMER SHALL BE DEEMED TO HAVE ACCEPTED THESE TERMS AND CONDITIONS, UPON THE SIGNING OF ANY WORK TICKET, THE ACCEPTANCE OF ANY BID OR QUOTE OR THE PERFORMANCE OF ANY WORK FOR CUSTOMER.

#### **WEBSITE SETUP INSTRUCTIONS**

- Your IT department or IT vendor will need to work with you to implement this project.
- Your IT group will need to create an area on your website to house the Terms and Conditions and/or other contract documents.
- This website area should be a directory under – public html – and should be reachable by clicking on a tab entitled “Contracts.” Your IT personnel will understand how to do this.
- All hosted documents should be put in your chosen final form and in .pdf format and added to this directory.
  
- The exact web address of the particular hosted document that you want to direct your customers to, must be included in your work tickets, emails, quotes, bids, or other agreements.
- This address must be accurate, so your customers can find and review the terms and conditions under which you are performing your work.
- You should train you personnel to include the suggested incorporation language in all work tickets, emails, quotes, bids, or other agreements.
- You should assign a staff member to check the URL(s) on a regular basis to make sure they are working correctly.