**Activate an Agreement**



**Work Instructions:**

**Send the Agreement Out for Signing**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To send the agreement out for signing, click on **Send Out for Signature** under **My Current Actions**.

* *Reviewers can elect to collect Internal and External Signatures in any order.*

1. The organization will pre-populate from the SmartForms. Enter information regarding a specific contact, if necessary.
2. Click the **OK** button.
3. The agreement will move to the **Out for Signature (Signing)** state.

**Revise the Agreement**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To upload a signed version of the agreement, click on **Revise Agreement** under **My Current Actions**.
4. Click the **Choose File** button and upload the signed version of the agreement. The version number will automatically populate.
5. Type **Notes**, if necessary.
6. Click the **OK** button.
7. The agreement will not change states.

**Convert the Agreement to PDF and Activate It**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation menu.
2. Click the **All Agreements** tab, and then click on the agreement’s **Name** to open it.
3. To convert the file, click on **Convert to PDF** under **My Current Actions**.
4. Click **OK**. The agreement will be converted to a read-only PDF document.
5. To activate the agreement, click on **Activate** under **My Current Actions**.
6. Click the **Add** button, and select an individual that signed the agreement.
7. Click **OK**, and then click **OK** once more. Repeat the process to add the names of all signatories.
8. Enter an **Internal signing date** and **External signing date**.
9. The **Effective** and **Expiration** dates will automatically pre-populate.
10. Click **OK**.
11. The agreement will move to the **Active** state.