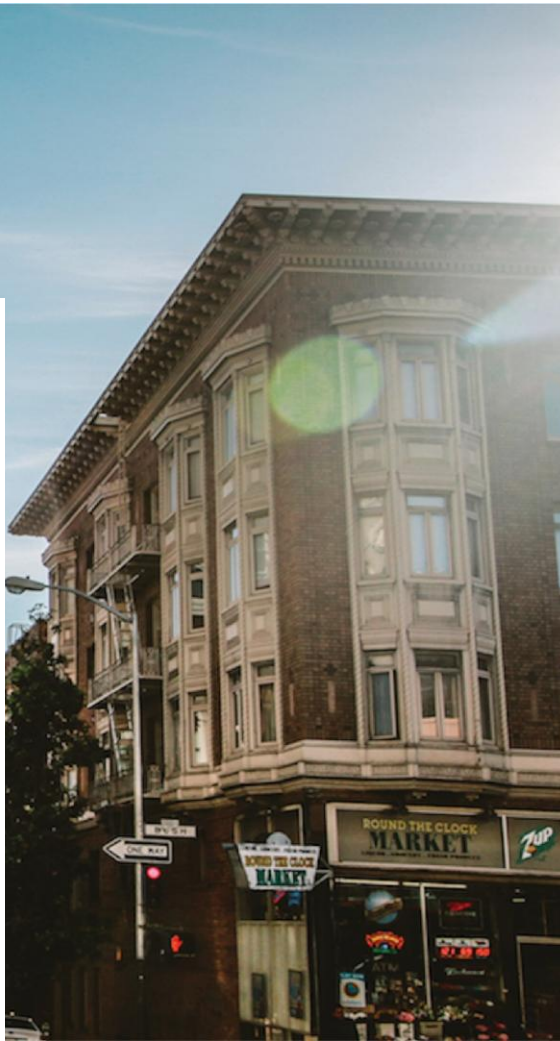


Contractor Portal User Guide

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BENEVATE, INC.
DBA NEIGHBORLY SOFTWARE



Neighborly Software

Atlanta Tech Village
3423 Piedmont Road NE
Atlanta, GA 30305
www.NeighborlySoftware.com

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Accessing the Contractor Portal

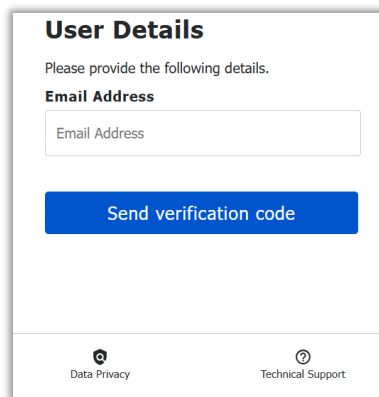
The Contractor Portal is hosted by Neighborly Software and is accessible via any internet connected device. The recommended browser is Google Chrome but will work with any modern web browser.

Contractor Portal Link: _____

Registration

To access the system, you'll need to create an account by first registering your email address. Select **Sign up now** and enter your work email address. Select "Send verification code". To verify your email address, the system will send you an email with a verification code.

Note: If you do not receive the email within 2 minutes, check your spam or junk mail folders. If the email is in either folder, mark the message as "Not Junk" or "Not Spam" to ensure you receive all future system notifications.



User Details

Please provide the following details.

Email Address

[Send verification code](#)

[Data Privacy](#) [Technical Support](#)

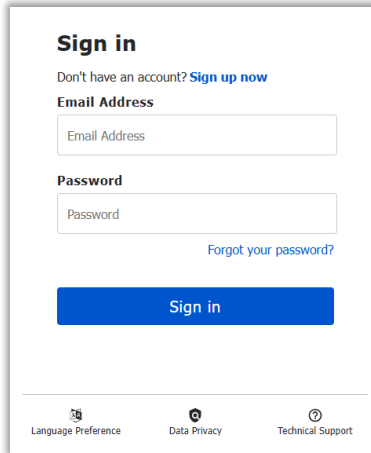
Enter the verification code into the text box and click "Verify Code."

If the code is not accepted, you may generate a new code by selecting "Send new code." Another email with a new code will be sent to your inbox.

After verifying your email address, you'll be prompted to create a password. Passwords should be at least 12 characters long and include at least one UPPERCASE letter, lowercase letter, a number, and a special character (!@#\$%^).

Signing 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 screenshot shows a 'Sign in' form with the following elements:

- Sign in** (Section Header)
- Don't have an account? [Sign up now](#)
- Email Address** (Label)
-
- Password** (Label)
-
- [Forgot your password?](#)
-
- Footer links: [Language Preference](#), [Data Privacy](#), [Technical Support](#)

Password Reset

If you forget your password, select the link "Forgot your Password?" and follow the prompts to create a new password.


Enter the email address that was used to register your account. Then select "Send Verification Code"

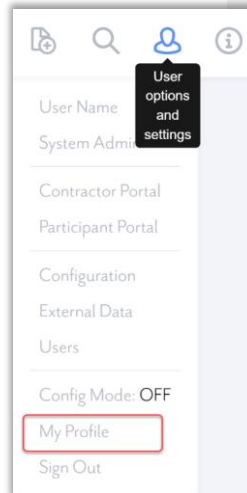
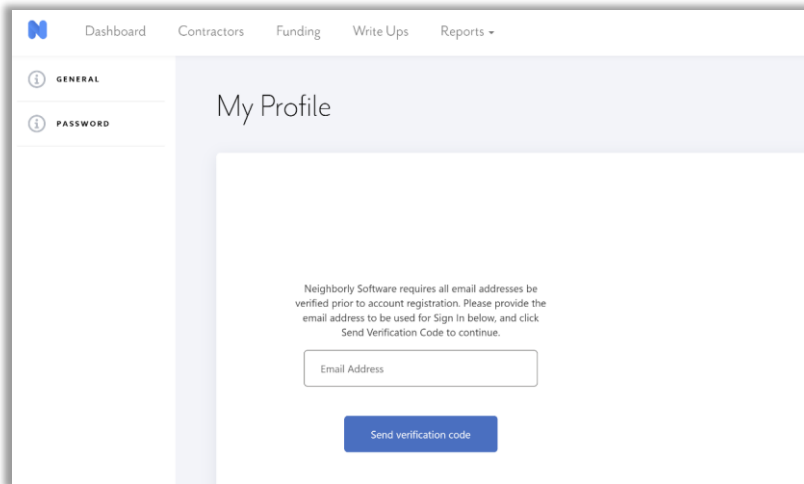
Within a few seconds, the system will send you an email containing a 6-digit code. Enter the code into the text field and select "Verify Code"

If after 2 minutes you have not received a code, you may repeat these steps to generate another code.

Be sure to check your spam and junk folders before requesting a new code. Sometimes users do not receive the code due to a simple typo when entering their email address. Verify that the email entered is indeed correct.

Changing your Password

If you feel your password may have been compromised, you may change it after logging in. To change your password, log into the Participant Portal. Select the  icon on the top right corner of the screen and select "My Profile". Next, select the "Password" option on the left side of the screen. For security purposes, you will be required to enter your email address, the system will then send you a verification code. Enter the code and follow the prompts to create a new password.



Contractor Information

General Info

The Contractor Information page serves as a primary location to manage all the information about your contractor company. This is where contact, license, as well as a variety of other information is stored. Any files uploaded here may only be edited by a Program Administrator. All information must first be verified by a Program Administrator prior to gaining full access to the dashboard and bidding opportunities.

Contractor Information

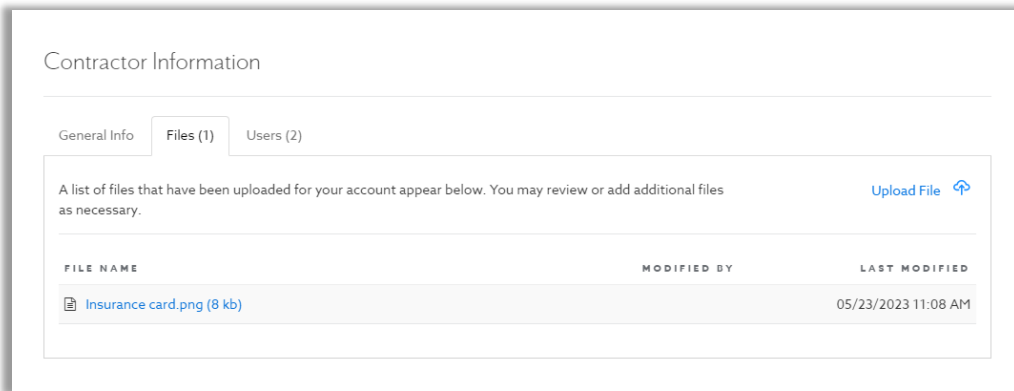
General Info
Files (1)
Users (2)

Use the form below to make updates to the your profile and then click the Save button at the bottom of the screen.

Company	<input type="text" value="Bluth Company"/>	License LHRS Exp. #1	<input type="text" value="05/01/2022"/>	<input type="checkbox"/> N/A
Owner Name	<input type="text" value="Michael Bluth"/>		Upload File	
Address	<input type="text" value="121 Banana Way"/>	Auto Insurance Exp.	<input type="text" value="08/10/2023"/>	<input type="checkbox"/> N/A
	<input type="text" value="Address Line 2"/>		Upload File	
	<input type="text" value="Los Angeles"/> <input type="text" value="CA"/> <input type="text" value="55555"/>	General Liability Exp.	<input type="text" value="07/05/2023"/>	<input type="checkbox"/> N/A
Phone/Office	<input type="text" value="(555) 555-5555"/>		Insurance card.png (8k)	
			Add Another File	
Phone/Mobile	<input type="text" value="(555) 555-5555"/>	Workers' Comp Exp.	<input type="text"/>	<input checked="" type="checkbox"/> N/A
Fax	<input type="text" value="(555) 555-5555"/>		Upload File	
Email	<input type="text" value="bluth@bluthco.com"/>	State License Date	<input type="text"/>	<input checked="" type="checkbox"/> N/A
GC Number	<input type="text"/>		Upload File	
Notes	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	Minority Business Enterprise	<input type="text" value="Yes"/>	
		Women Business Enterprise	<input type="text" value="No"/>	
		Section 3 Contractor	<input type="text" value="Yes"/>	

Files


Documents uploaded to the profile can be found in the File tab. The Upload File link may be used to upload additional files you wish to share with the Program Administrator.



Contractor Information

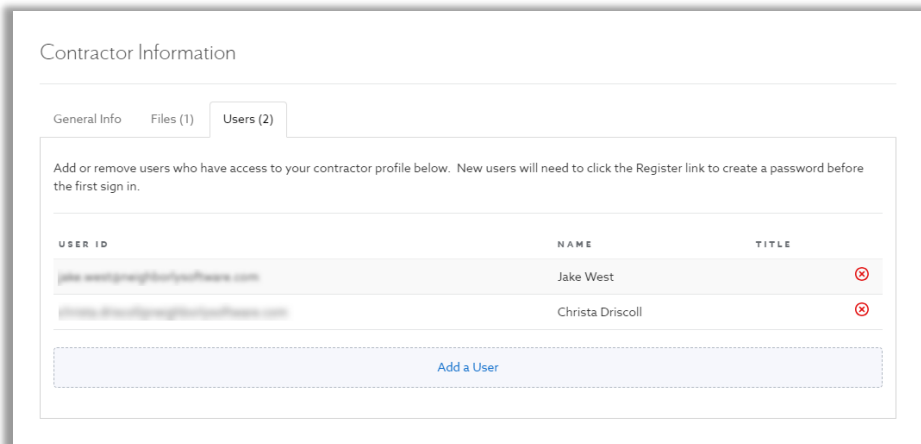
General Info Files (1) Users (2)

A list of files that have been uploaded for your account appear below. You may review or add additional files as necessary. [Upload File](#)

FILE NAME	MODIFIED BY	LAST MODIFIED
 Insurance card.png (8 kb)		05/23/2023 11:08 AM

Users



Additional users within your organization can be added on the Users tab. Once the email address has been entered, the user may then register their account in the Contractor Portal by following the Registration process outlined in this Guide. **NOTE:** the system does not send a notification to the user when they are added to the account.



Contractor Information

General Info Files (1) Users (2)

Add or remove users who have access to your contractor profile below. New users will need to click the Register link to create a password before the first sign in.


USER ID	NAME	TITLE
jake.west@neighborlysoftware.com	Jake West	
christa.driscoll@neighborlysoftware.com	Christa Driscoll	

[Add a User](#)

Responding to Bids

Available Opportunities


From the Dashboard, Bid Solicitations that are available but have not yet been viewed will be in the **Available Opportunities** card. To open the opportunity, click the arrow next to the bid solicitation to view the Bid Submission page.

ID	NAME	CASE	ADDRESS	CLOSE DATE	
30012 - 45	May Write Up	Dell, Babette	1235 Constabulary Road	6/30/2023 3:00 PM	


Reviewing Bid Information

The first part of the page will display general information about the project. This may include a Scope of Work summary as well as additional documents to download and view. The opportunity may be rendered to a PDF (which can be printed or saved on your device) by selecting the printer icon on the right-hand side of the page.

Action	Respond To Bid	Contractor	218: Bluth Company
Project Id	30006 - 4	Address	8575 Jean Ct Atlanta GA 30037
Project Name	Initial Write Up	Open Date	6/1/2023 7:00 AM
Case	Forrester, Dean	Close Date	2/1/2024 8:00 AM

SCOPE OF WORK	BID DOCUMENTS	
Tear Roof Down to the Deck Install new 2" insulation board Install 1/2" cover board Install CertainTeed Platinum Shingle System Provide 30 year warranty Open House: March 9th at 1:00PM	**No files uploaded	

Below the Bid Information the Work Items that have been specified for the project will be listed.

LOCATION: EXTERIOR			
EXTERIOR WALLS	QUANTITY	UNIT	TOTAL
<p>8. REPAIR THE ROOF OVERHANG AND RAFTER TAILS</p> <p><i>Replace severely defective, rotten and missing rafter tails, barge rafters, fascia board and roof decking at eaves and overhangs.</i></p> <p><i>Specification Id: 30.07750 Estimated Qty: 50</i></p>	<input type="text" value="0"/>	LF	\$ 0.00
<p>9. REPAIR THE CORNICE AT ROOF OVERHANGS</p> <p><i>Replace severely defective, rotten and missing cornice components including fascia boards, soffit boards, frieze boards and rafter tails. New material to match remaining material as closely as possible.</i></p> <p><i>Specification Id: 30.08250 Estimated Qty: 500</i></p>	<input type="text" value="0"/>	LF	\$ 0.00
ROOF & ATTIC	QUANTITY	UNIT	TOTAL
<p>10. GENERAL ROOF WORK</p> <p><i>Specification Id: 35.00000 Estimated Qty: 0</i></p> <p>Pictures</p> 	<input type="text" value="0"/>	EA	\$ 0.00
<p>11. ADD BRACES IN ATTIC BETWEEN CEILING JOISTS AND ROOF</p> <p><i>Construct 2" x 4" stud wall in attic to help straighten and support roof plane. Locate wall about half way between top and side of roof. Bottom plate to be fastened to top of ceiling joists and top plate to be fastened to bottom of rafters. Studs to be located directly above ceiling joists and below rafters. In no case shall studs be more than 24" apart.</i></p> <p><i>Specification Id: 35.00250 Estimated Qty: 100</i></p>	<input type="text" value="0"/>	LF	\$ 0.00
<p>12. REPLACE UP TO 10% OF ROOF DECKING</p> <p><i>Replace up to 10% of any rotten, badly warped or broken roof decking and nailers. Material shall match remaining material as closely as possible. Roofs requiring more than 10% decking shall be covered through a Change Order. Call Program Administrator for Compliance Inspection after installing new decking and nailers, and before replacing additional decking and nailers.</i></p> <p><i>Specification Id: 35.03750 Estimated Qty: 100</i></p>	<input type="text" value="0"/>	SF	\$ 0.00
<p>13. INSTALL NEW SHINGLES ON ROOF DECKING</p> <p><i>Install 15 lb asphalt saturated felt and new 220 lb or heavier class "A" three tab fiberglass self sealing strip shingles on top of roof decking using a minimum of 8 nails per shingle. Install starter course at edges of roof</i></p>	<input type="text" value="0"/>	SF	\$ 0.00

Saving & Submitting a Bid

Once all the pertinent information has been reviewed, enter the bid amounts next to each line item.

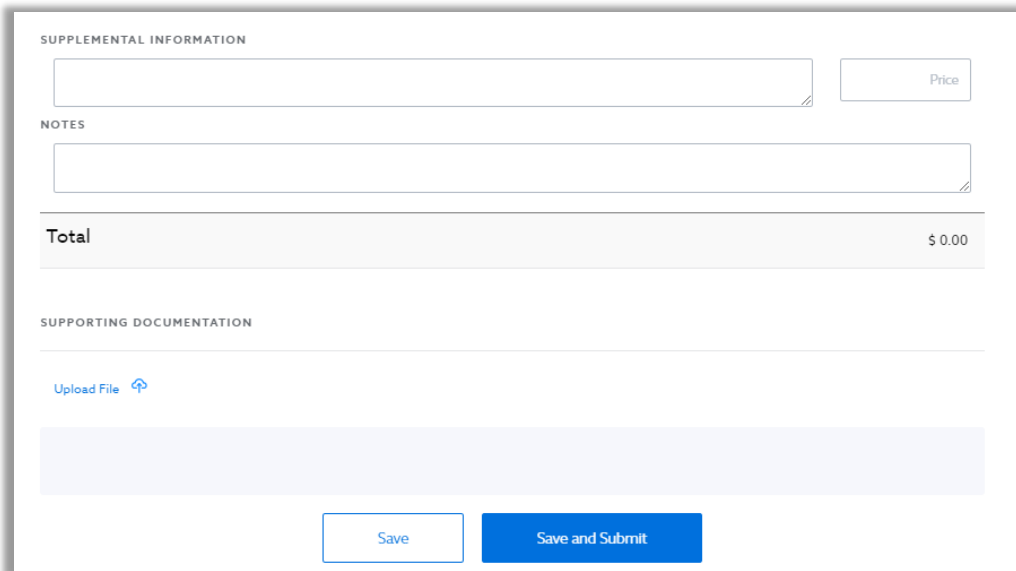
IF APPLICABLE:

If there are additional costs that are not included as a Work Item, you may include that pricing in the “Supplemental Information” section at the bottom of the bid form.

Supporting Documentation may be uploaded with the bid submission. This may or may not be required, depending on instructions from the Program.

Once all the information has been entered, save the entries by selecting the **Save** button at the bottom of the page. Once everything has been entered and finalized, submit the bid by selecting the **Save and Submit** button at the bottom of the page.

Edits and changes can be made to the bid if the bid is still open. Once the bid has officially been closed, no further changes can be made.




The screenshot displays a bid form interface with the following sections:

- SUPPLEMENTAL INFORMATION:** A text input field and a "Price" input field.
- NOTES:** A text input field.
- Total:** A summary row showing "Total" on the left and "\$ 0.00" on the right.
- SUPPORTING DOCUMENTATION:** An "Upload File" button with a file icon.
- Buttons:** "Save" and "Save and Submit" buttons at the bottom.

Active Projects

If a contract has been won/awarded, it will be listed in the **Active Projects** card. Select the arrow on the right to view the details of the project and to submit Draw Requests.

Active Projects (1)

ID	NAME	CASE	ADDRESS	% COMPLETE	
30523 - 92	Keliher Project	Keliher, Ryan		34 %	

Schedule of Values

The first page will be the Schedule of Values. These values have been set by the Program Administrator to track and manage construction progress as well as disbursements. The Scheduled values will be used to create draw requests.

Home Contractor Information

SCHEDULE OF VALUES



Project Name Keliher Project Case Id 30523
Address , Case Name Keliher, Ryan

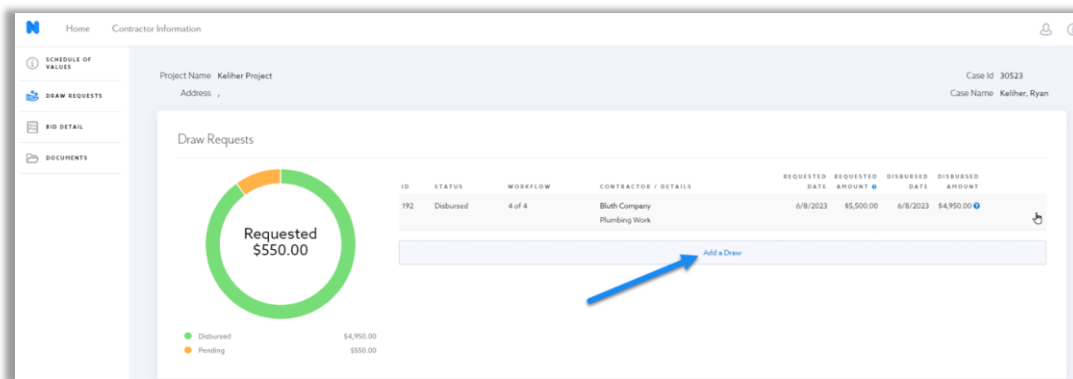
DRAW REQUESTS
BID DETAIL
DOCUMENTS

Schedule of Values

<input type="checkbox"/>	#	NAME	C/O	SCHEDULED AMOUNT	PERCENT COMPLETE	EARNED	RETAINAGE	EARNED LESS RETAINAGE	BALANCE REMAINING
<input type="checkbox"/>	1.	Electrical	0	\$76.86	0 %	\$0.00	\$0.00	\$0.00	\$76.86
<input type="checkbox"/>	2.	Floors & Stairs	1	\$9,250.00	0 %	\$0.00	\$0.00	\$0.00	\$9,250.00
<input type="checkbox"/>	3.	Plumbing System	0	\$5,500.00	100 %	\$5,500.00	\$550.00	\$4,950.00	\$0.00
<input type="checkbox"/>	4.	Roof & Attic	0	\$1,000.00	0 %	\$0.00	\$0.00	\$0.00	\$1,000.00
<input type="checkbox"/>	5.	Site Work	0	\$1,000.00	0 %	\$0.00	\$0.00	\$0.00	\$1,000.00
<input type="checkbox"/>	6.	Windows	0	\$200.00	0 %	\$0.00	\$0.00	\$0.00	\$200.00
Totals				\$17,026.86	32 %	\$5,500.00	\$550.00	\$4,950.00	\$11,526.86

Draw Requests

The Draw Requests allows you to request draws from your remaining account balance. The initial screen is a summary of any existing draw requests and disbursement data. To view an existing draw, select the  icon to the right of the draw. To render a PDF of the Draw Voucher, select the  icon.



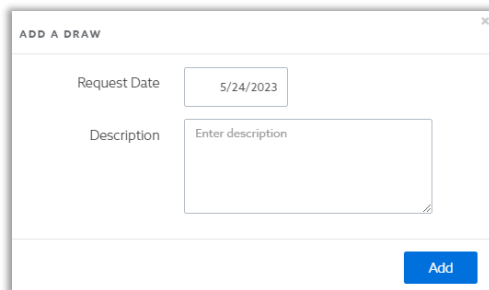
The screenshot displays the 'Draw Requests' section of the Contractor Portal. On the left, a donut chart shows the status of requests: a green segment for 'Disbursed' (\$4,950.00) and an orange segment for 'Pending' (\$550.00). The total requested amount is \$550.00. To the right, a table lists draw requests with columns for ID, Status, Workflow, Contractor / Details, Requested Date, Requested Amount, Disbursed Date, and Disbursed Amount. A single row is visible for ID 192, Status 'Disbursed', Workflow '4 of 4', Contractor 'Bluth Company Plumbing Work', Requested Date '6/8/2023', Requested Amount '\$5,500.00', Disbursed Date '6/8/2023', and Disbursed Amount '\$4,950.00'. Below the table is a light blue bar with the text 'Add a Draw' and a blue arrow pointing to it.

Submitting a New Draw

To create a new draw, select the “Add a Draw” bar.

The system will default the “Request Date” to today’s date; however, you will have the ability to update the date by clicking on the text box and using the date picker to select a new date.

Enter a description/summary of the draw. You will have the ability to update the details further on the next page.



The 'ADD A DRAW' form is a modal window with a white background and a thin border. It contains two main input fields: 'Request Date' with a date picker showing '5/24/2023' and 'Description' with a text area containing the placeholder 'Enter description'. At the bottom right, there is a blue button labeled 'Add'.


- Once the draw has been created, provide a brief description of the draw request in the Summary box.
- Attach all required supporting documentation (e.g., invoices, receipts, timesheets etc.).
- Assign the appropriate amount of money to each schedule of values that is included in the draw request.
- Click Submit to send the draw request to the Program Administrator for review.

The draw will then be in a read-only mode where no further edits/changes can be made.


Request: Workflow 0 of 4"


****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**

June 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	Electrical	\$76.86	0 %	\$76.86	\$ 76.86	100 %	\$ 7.69	\$ 69.17
2	Floors & Stairs	\$9,250.00	0 %	\$9,250.00	\$ 5,000.00	54 %	\$ 500.00	\$ 4,500.00
3	Plumbing System	\$5,500.00	100 %	\$0.00		100 %		
4	Roof & Attic	\$1,000.00	0 %	\$1,000.00	\$ 0.00	0 %	\$ 0.00	\$ 0.00
5	Site Work	\$1,000.00	0 %	\$1,000.00	\$ 0.00	0 %	\$ 0.00	\$ 0.00
6	Windows	\$200.00	0 %	\$200.00	\$ 0.00	0 %	\$ 0.00	\$ 0.00
Totals		\$17,026.86	32 %	\$11,526.86	\$ 5,076.86	62 %	\$ 507.69	\$ 4,569.17
							Retainage to be released 	\$ 0.00
							Amount to be paid	\$ 4,569.17

Track the draw request review process by selecting the "Workflow" tab. You may also render a PDF of the Draw Request by selecting the  icon in the upper right.

Draw Requests > Draw Id: 11 

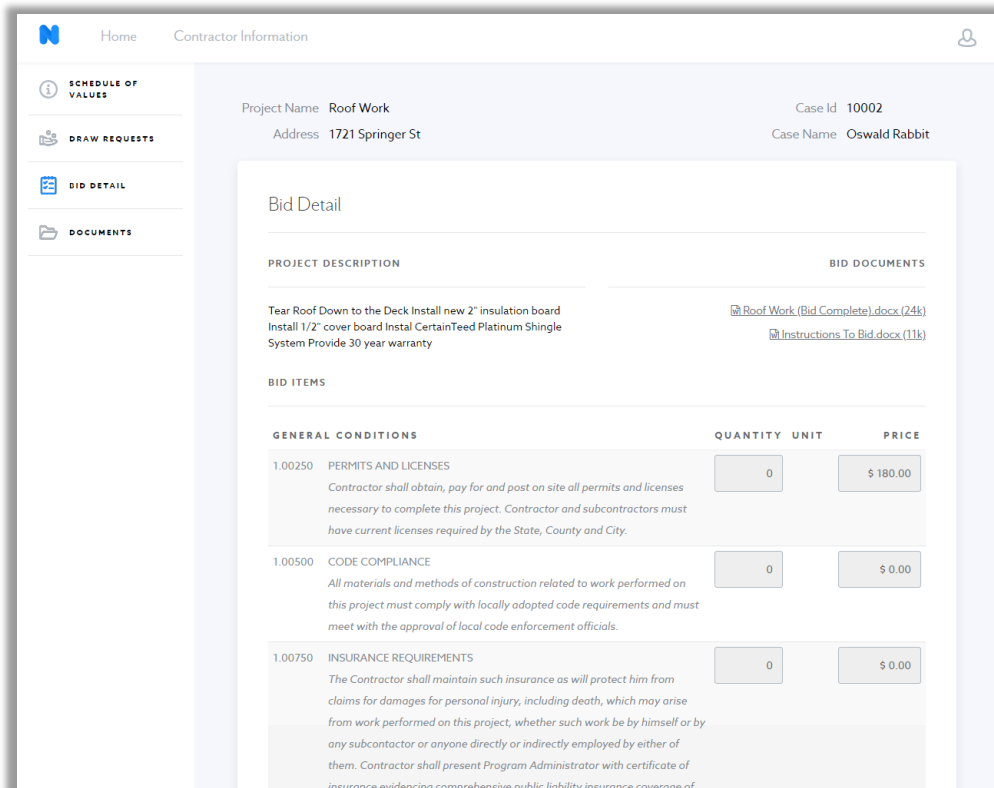
Status: Not Submitted Amount Requested: \$0.00
Date Requested: 5/24/2023 Amount Approved: \$0.00

Request: Workflow 0 of 3" 

ACTIVITY	DATE COMPLETED	COMPLETED BY
Senior Financial Analyst Lead	Not yet approved	
PIER Contract Manager	Not yet approved	
Accounting	Not yet disbursed	

Bid Detail

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

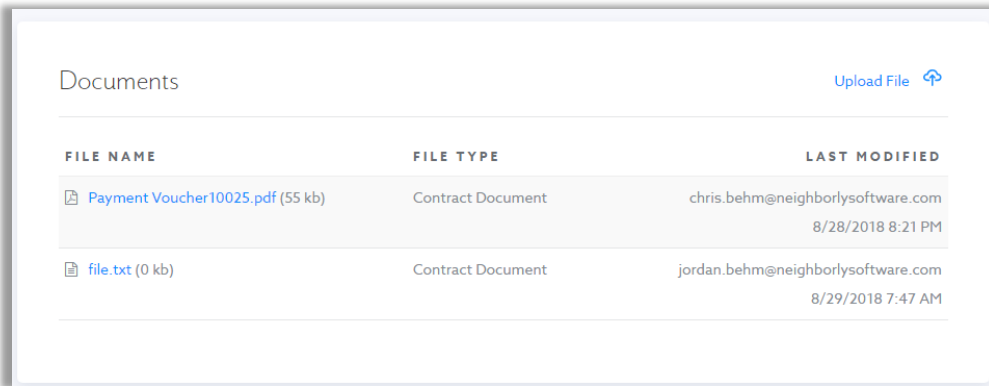


The screenshot displays the 'Bid Detail' page for a project named 'Roof Work'. The page includes a sidebar with navigation options: SCHEDULE OF VALUES, DRAW REQUESTS, BID DETAIL (selected), and DOCUMENTS. The main content area shows project details: Project Name (Roof Work), Address (1721 Springer St), Case Id (10002), and Case Name (Oswald Rabbit). Below this, there are sections for PROJECT DESCRIPTION, BID DOCUMENTS, and BID ITEMS. The BID ITEMS section contains a table with columns for GENERAL CONDITIONS, QUANTITY, UNIT, and PRICE.



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


The **Documents** tab may be used to upload documents related to this project. Files can only be removed by a Program Administrator.

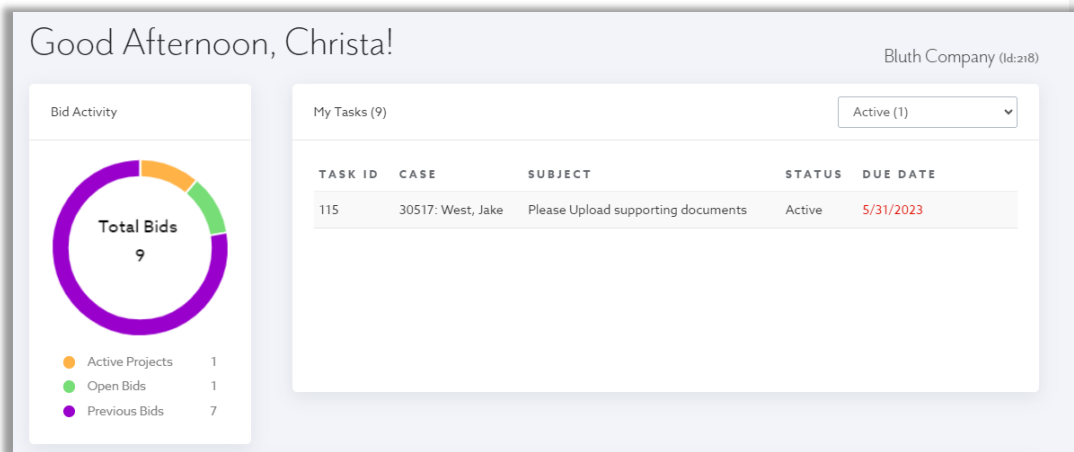


The screenshot shows a web interface for the 'Documents' tab. At the top left is the word 'Documents' and at the top right is a blue 'Upload File' button with a plus icon. Below this is a table with three columns: 'FILE NAME', 'FILE TYPE', and 'LAST MODIFIED'. The table contains two rows of data.

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

Tasks

You may be assigned a task by a Program Administrator. Tasks will be displayed on the Portal Dashboard. To open a task, select the  to the right of the task.



Good Afternoon, Christa! Bluth Company (11:21:18)

Bid Activity

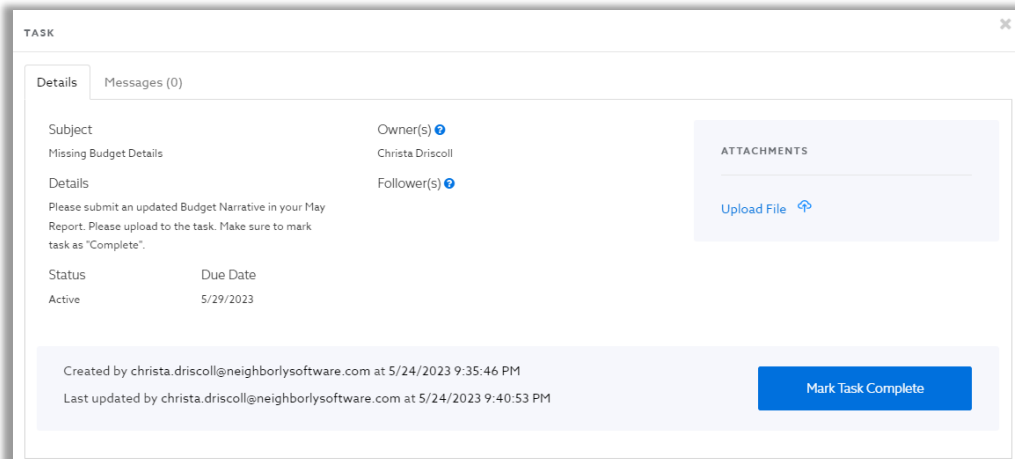
Total Bids
9

- Active Projects 1
- Open Bids 1
- Previous Bids 7

My Tasks (9) Active (1) ▾

TASK ID	CASE	SUBJECT	STATUS	DUE DATE
115	30517: West, Jake	Please Upload supporting documents	Active	5/31/2023

Once inside the task, view the details and complete the request. You may upload any supporting files by selecting the "Upload File" hyperlink.



TASK ✕

Details Messages (0)

Subject
Missing Budget Details

Details
Please submit an updated Budget Narrative in your May Report. Please upload to the task. Make sure to mark task as "Complete".

Status **Due Date**
Active 5/29/2023

Owner(s)
Christa Driscoll

Follower(s)

ATTACHMENTS


[Upload File](#)

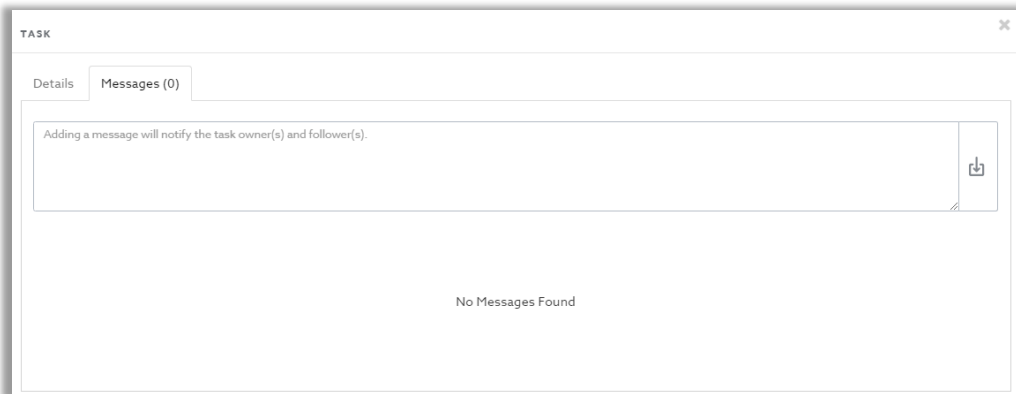
Created by christa.driscoll@neighborlysoftware.com at 5/24/2023 9:35:46 PM

Last updated by christa.driscoll@neighborlysoftware.com at 5/24/2023 9:40:53 PM

[Mark Task Complete](#)

Additionally, if there are follow up questions regarding the task, you may send a message in the task to the Program Administrator who originally assigned the task. Select the Messages Tab, enter a detailed message in the

text area, then select the  icon to post the message. You will be notified via email once a response has been posted. Once the task has been completed, select the “Mark Task Complete” button.

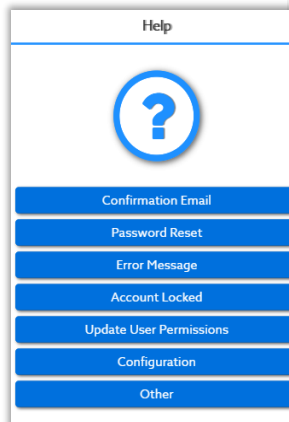


The screenshot shows a window titled "TASK" with a close button in the top right corner. Below the title bar are two tabs: "Details" and "Messages (0)". The "Messages" tab is active. Inside the tab, there is a text input area with a placeholder text: "Adding a message will notify the task owner(s) and follower(s)." To the right of the input area is a post icon. Below the input area, the text "No Messages Found" is displayed.

Technical Difficulties

If at any point you run into technical difficulties with the software, use the help icon located in the **bottom right corner of your screen** to contact our Support Team. Support is available Monday – Friday from 8am to 7pm Eastern Time.

**For questions related to the program, your bids, draws, or payments, please contact your Program Administrator.



The screenshot shows a "Help" menu with a question mark icon at the top. Below the icon are seven blue buttons with white text: "Confirmation Email", "Password Reset", "Error Message", "Account Locked", "Update User Permissions", "Configuration", and "Other".