

Contractor Portal User Guide

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BENEVATE, INC.
DBA NEIGHBORLY SOFTWARE



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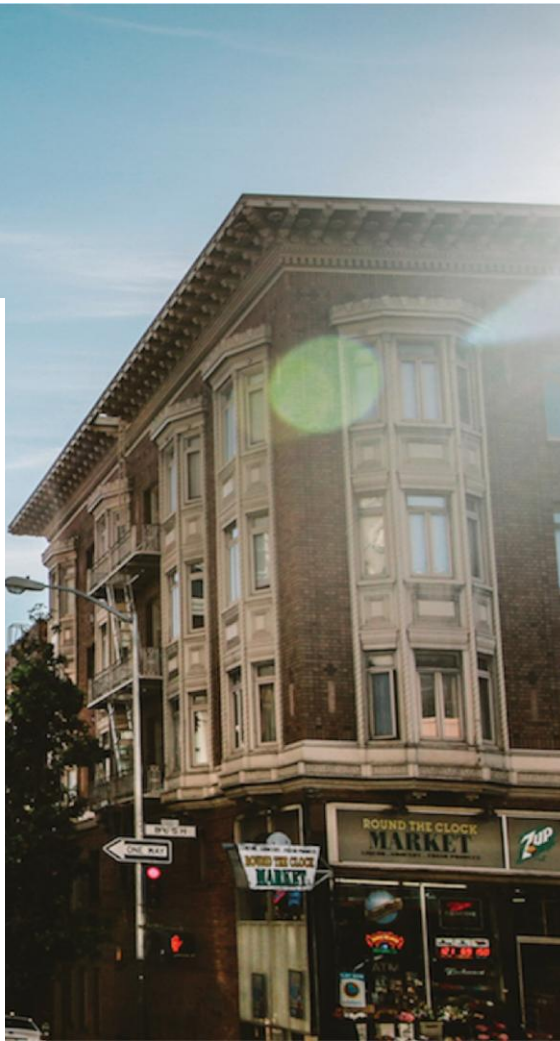


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Accessing the Contractor Portal

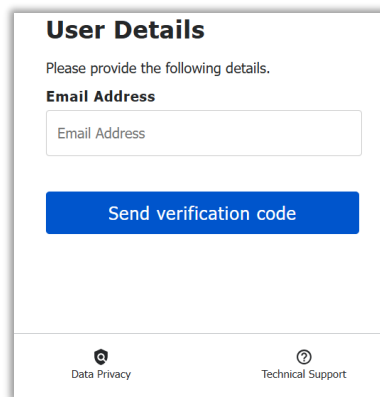
The Contractor Portal is hosted by Neighborly Software and is accessible via any internet connected device. The recommended browser is Google Chrome but will work with any modern web browser.

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](#)

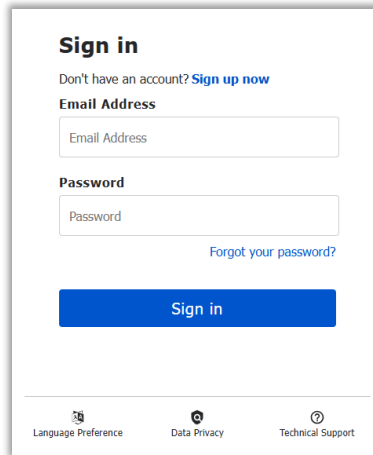
Enter the verification code into the text box and click "Verify Code."

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.



Sign in

Don't have an account? [Sign up now](#)

Email Address

Password

[Forgot your password?](#)

Sign in

[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”

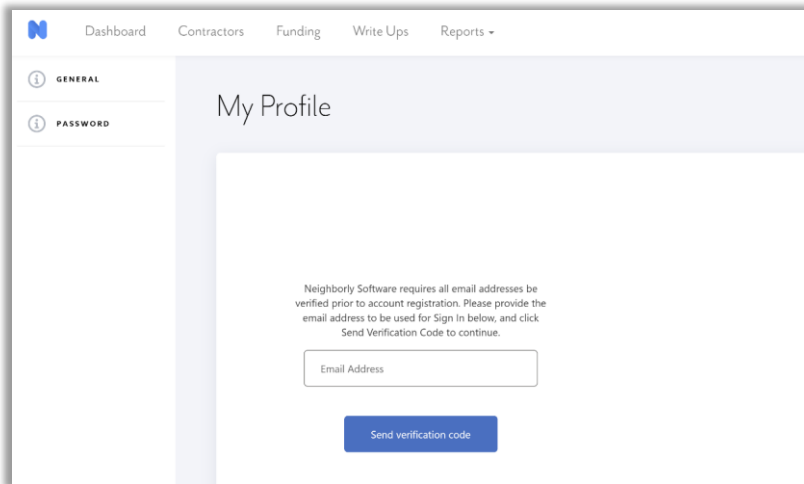
Within a few seconds, the system will send you an email containing a 6-digit code. Enter the code into the text field and select “Verify Code”

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.



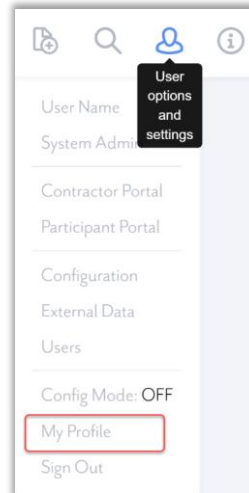
Dashboard Contractors Funding Write Ups Reports ▾

① GENERAL
① PASSWORD

My Profile

Neighborly Software requires all email addresses be verified prior to account registration. Please provide the email address to be used for Sign In below, and click Send Verification Code to continue.

Send verification code



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)

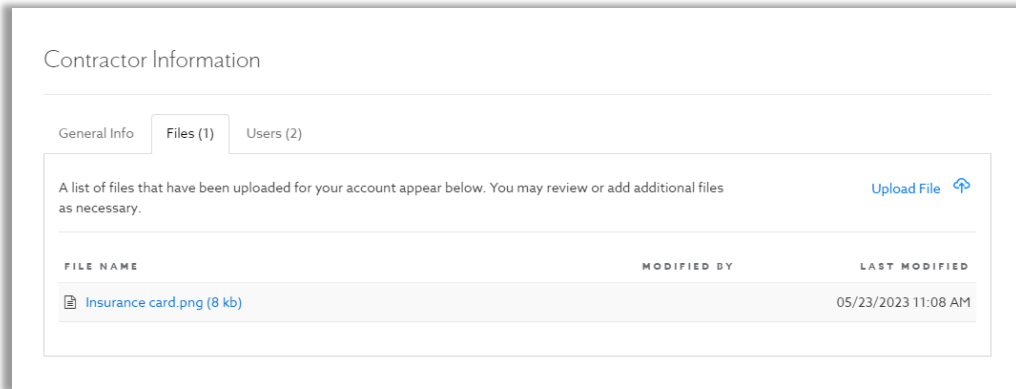
Use the form below to make updates to the your profile and then click the Save button at the bottom of the screen.

Company	Bluth Company	License LHRS Exp. #1	05/01/2022	☐ N/A
Owner Name	Michael Bluth		Upload File	
Address	121 Banana Way	Auto Insurance Exp.	08/10/2023	☐ N/A
	Address Line 2		Upload File	
	Los Angeles CA 55555	General Liability Exp.	07/05/2023	☐ N/A
Phone/Office	(555) 555-5555		Insurance card.png (8k)	
			Add Another File	
Phone/Mobile	(555) 555-5555	Workers' Comp Exp.		☒ N/A
Fax	(555) 555-5555		Upload File	
Email	bluth@bluthco.com	State License Date		☒ N/A
GC Number			Upload File	
Notes		Minority Business Enterprise	Yes	
		Women Business Enterprise	No	
		Section 3 Contractor	Yes	

Save

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.

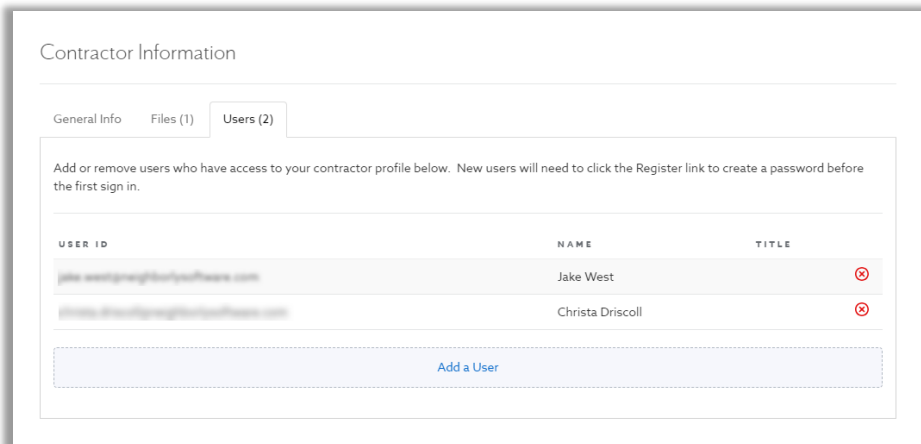


The screenshot shows the 'Contractor Information' page with the 'Files (1)' tab selected. It displays a list of uploaded files, including 'Insurance card.png (8 kb)' with a last modified date of '05/23/2023 11:08 AM'. An 'Upload File' link with a plus icon is visible in the top right corner of the file list area.

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.



The screenshot shows the 'Contractor Information' page with the 'Users (2)' tab selected. It displays a list of users with columns for 'USER ID', 'NAME', and 'TITLE'. Two users are listed: Jake West and Christa Driscoll. Each user entry has a red 'X' icon in the title column, indicating a delete or remove action. An 'Add a User' button is located at the bottom of the user list.

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.

Available Opportunities (1)				
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

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

BID DOCUMENTS

***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
8. REPAIR THE ROOF OVERHANG AND RAFTER TAILS <i>Replace severely defective, rotten and missing rafter tails, barge rafters, fascia board and roof decking at eaves and overhangs.</i> <i>Specification Id: 30.07750 Estimated Qty: 50</i>	0	LF	\$ 0.00
9. REPAIR THE CORNICE AT ROOF OVERHANGS <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> <i>Specification Id: 30.08250 Estimated Qty: 500</i>	0	LF	\$ 0.00

ROOF & ATTIC	QUANTITY	UNIT	TOTAL
10. GENERAL ROOF WORK <i>Specification Id: 35.00000 Estimated Qty: 0</i> Pictures  	0	EA	\$ 0.00
11. ADD BRACES IN ATTIC BETWEEN CEILING JOISTS AND ROOF <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> <i>Specification Id: 35.00250 Estimated Qty: 100</i>	0	LF	\$ 0.00
12. REPLACE UP TO 10% OF ROOF DECKING <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> <i>Specification Id: 35.03750 Estimated Qty: 100</i>	0	SF	\$ 0.00
13. INSTALL NEW SHINGLES ON ROOF DECKING <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>	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.

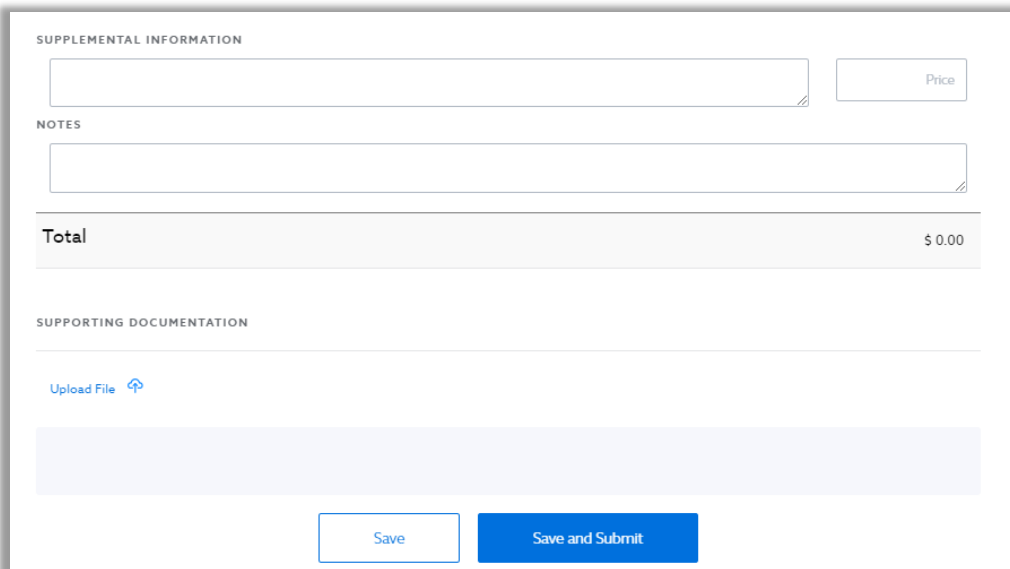
IF APPLICABLE:

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 shows a web form for submitting a bid. It includes sections for supplemental information, notes, a total amount, and supporting documentation. At the bottom are 'Save' and 'Save and Submit' buttons.

SUPPLEMENTAL INFORMATION	
	Price

NOTES

Total	\$ 0.00
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SUPPORTING DOCUMENTATION

Upload File 

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

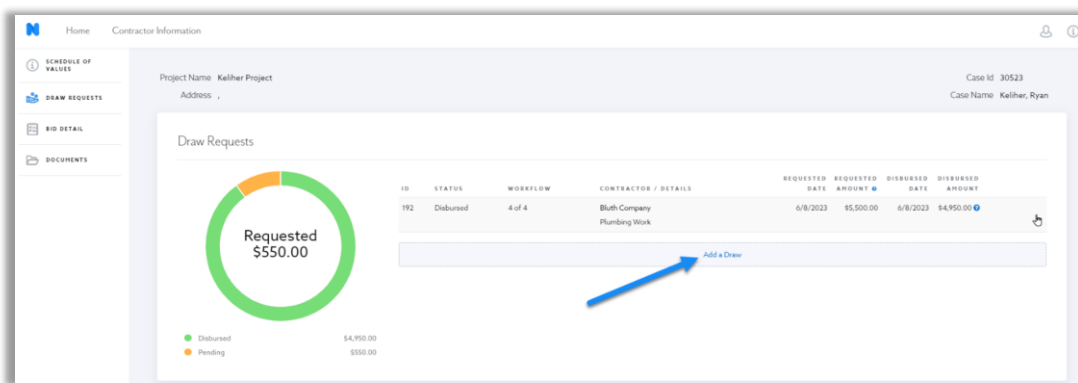
Project Name Keliher Project Case Id 30523
Address , Case Name Keliher, Ryan

Schedule of Values

#	NAME	C/O	SCHEDULED AMOUNT	PERCENT COMPLETE	EARNED	RETAINAGE	EARNED LESS RETAINAGE	BALANCE REMAINING
☐ 1.	Electrical	0	\$76.86	0 %	\$0.00	\$0.00	\$0.00	\$76.86
☐ 2.	Floors & Stairs	1	\$9,250.00	0 %	\$0.00	\$0.00	\$0.00	\$9,250.00
☐ 3.	Plumbing System	0	\$5,500.00	100 %	\$5,500.00	\$550.00	\$4,950.00	\$0.00
☐ 4.	Roof & Attic	0	\$1,000.00	0 %	\$0.00	\$0.00	\$0.00	\$1,000.00
☐ 5.	Site Work	0	\$1,000.00	0 %	\$0.00	\$0.00	\$0.00	\$1,000.00
☐ 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.



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.

ADD A DRAW

Request Date

5/24/2023

Description

Enter description

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 %	\$17,526.86	\$ 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

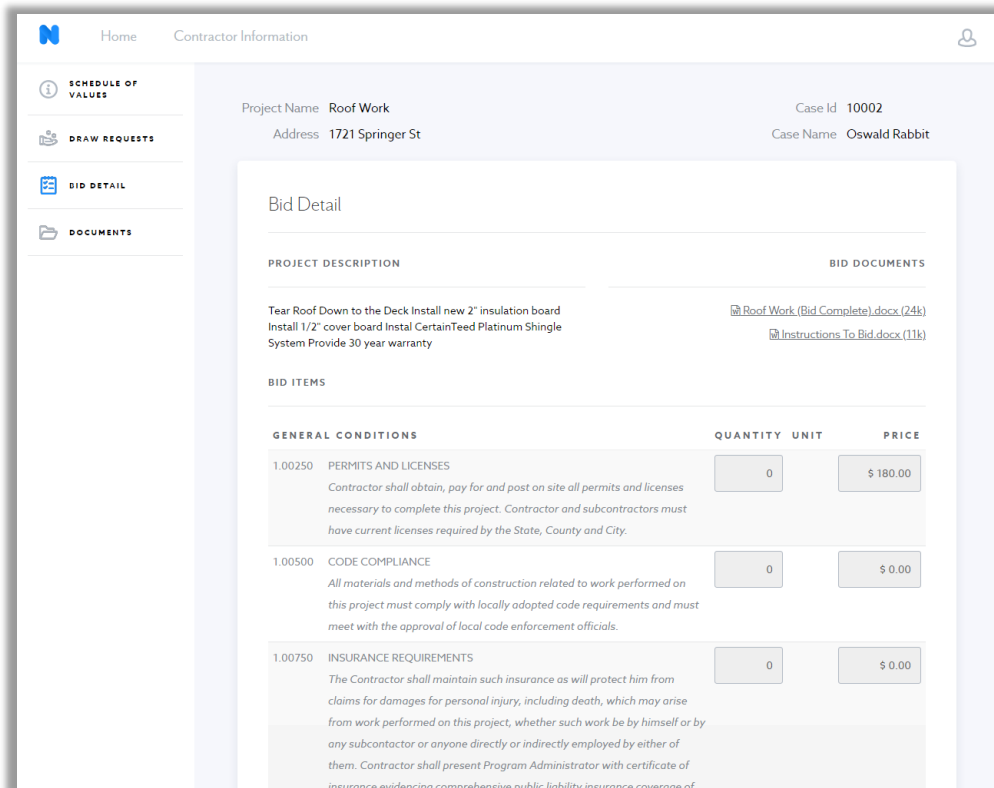
Not yet approved

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.



Home Contractor Information

SCHEDULE OF VALUES
DRAW REQUESTS
BID DETAIL
DOCUMENTS

Project Name **Roof Work** Case Id **10002**
Address **1721 Springer St** Case Name **Oswald Rabbit**

Bid Detail

PROJECT DESCRIPTION

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

BID DOCUMENTS

[Roof Work \(Bid Complete\).docx \(24k\)](#)
[Instructions To Bid.docx \(11k\)](#)

BID ITEMS

GENERAL CONDITIONS	QUANTITY	UNIT	PRICE
1.00250 PERMITS AND LICENSES 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.	0		\$ 180.00
1.00500 CODE COMPLIANCE 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.	0		\$ 0.00
1.00750 INSURANCE REQUIREMENTS 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	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.

Documents			Upload File 
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 (Id:218)

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

Active

Owner(s)

Christa Driscoll

Follower(s)

Due Date

5/29/2023

ATTACHMENTS

Upload File

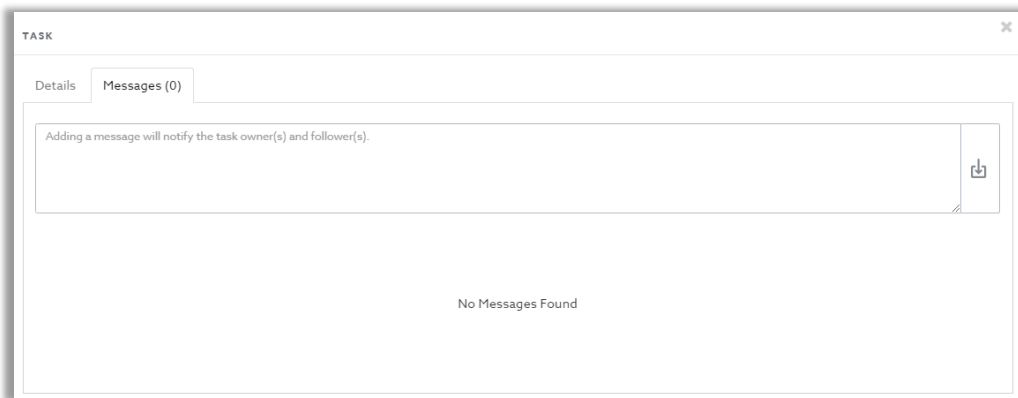
Created by christa.driscoll@neighborlysoftware.com at 5/24/2023 9:35:46 PM

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.

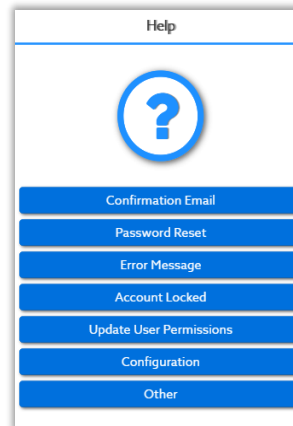


The screenshot shows a window titled "TASK" with a close button in the top right corner. Inside the window, there are two tabs: "Details" and "Messages (0)". The "Messages (0)" tab is selected. Below the tabs is a text input area with a placeholder text: "Adding a message will notify the task owner(s) and follower(s)." To the right of the text input area is a small icon of a document with an arrow pointing up. Below the text 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 blue header bar. Below the header bar is a large blue circle containing a white question mark. Below the question mark are seven blue buttons with white text, stacked vertically: "Confirmation Email", "Password Reset", "Error Message", "Account Locked", "Update User Permissions", "Configuration", and "Other".