

## Contracts Dashboard Overview

A quick guide and overview for working with Bonfire.

🕒 26-Jun-2025 Knowledge

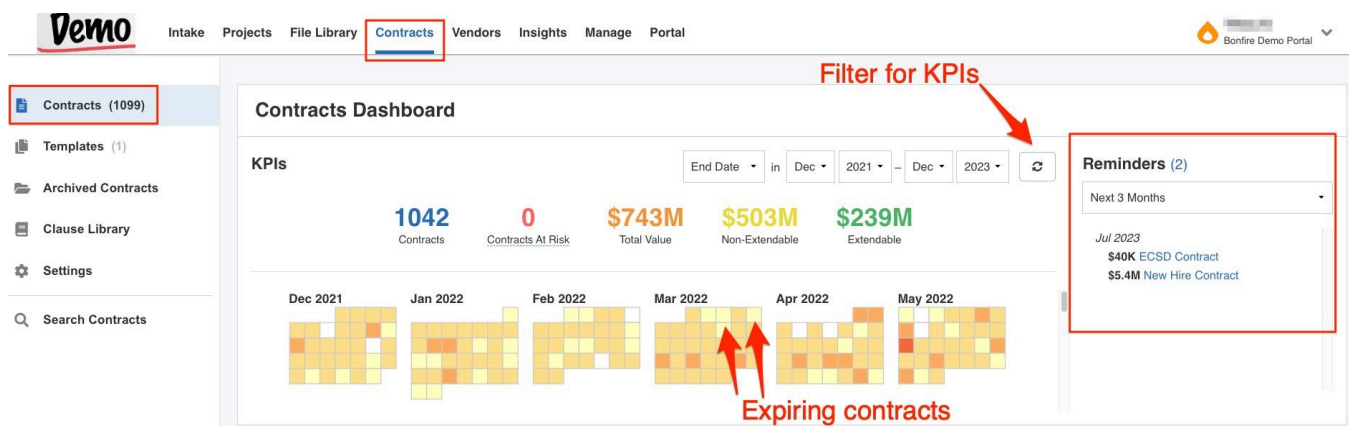
### Content

## Contracts Dashboard Overview

When the Contracts module is enabled you will see a new heading titled **Contracts** across the top heading banner:



Let's take a closer look at the first section of the Contracts Dashboard, the **KPIs** (Key Performance Indicators):



The values that are displayed on the dashboard are populated based on the date range defined by the user:

Start Date  
Lead Time  
✓ End Date

in
Sep
2021
Feb
2022

Refresh

- **Start Date:** contract start date
- **Lead Time:** the amount of time you need in days in order to prepare / take action before the end of the contract (defined by the user per contract at the time of creation)
- **End Date:** contract end date

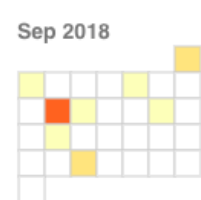
To filter based on your range, click on the **refresh button**:

Start Date  
Lead Time  
✓ End Date

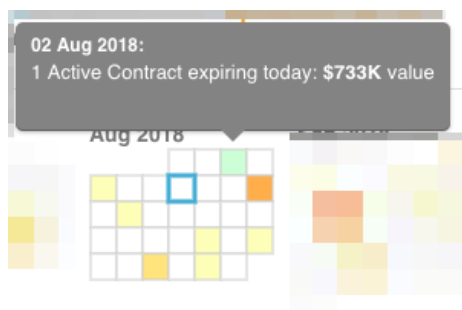
in
Sep
2021
Feb
2022

Refresh

Note how the months are displayed using a 'heat map' colour range. The darker (hotter) the shaded day, the higher the number of contracts with respective actions on that day.



You can hover your mouse over the shaded dates to view a Tooltip outlining the number of Active Contracts expiring/starting as well as the Total Value (\$) expiring/starting on that particular date:



In the upper-right you will see a Reminders section outlining your own upcoming reminders. You can change the timeframe by clicking on the dropdown menu:

## Reminders (2)

Next 3 Months

Dec 2021

\$567K HQ Building Renovations

\$450K HQ Building Maintenance

Scrolling down, you will see the **Contracts** section, located beneath the KPI's. In this chart, you will see all of your current contracts, their status, and an overview of their important information. The columns that are displayed can be sorted by clicking on the column heading.

**Contracts (27)**

Type: All

Change displayed columns

Add/remove people to multiple contracts

Renewable

Auto-renewable

Status	Contract	Vendor	Value	Start Date	Lead Date	End Date	Progr...	Renewable	Auto-renewable
PENDING	Electronic Monitorin...	Htc Global Services ...	\$10,748.00	27 Oct 2021	18 Aug 2022	16 Nov 2022	0%		
ACTIVE	Boots	Demo Inc	\$0.00	05 Nov 2019	06 Aug 2021	04 Nov 2021	97%		
ACTIVE	Restart Sr. Program...	Company B	\$440,448.00	07 Jan 2021	09 Sep 2021	07 Jan 2022	76%		
ACTIVE	Higher Education E...	Company C	\$54,862.00	05 Feb 2021	06 Nov 2021	04 Feb 2022	68%		
ACTIVE	High Speed Digital P...	Xerox Corporation	\$32,948.00	15 Jan 2021	16 Oct 2021	14 Jan 2022	74%		
ACTIVE	Gasoline & Fuel Oil ...	Gary Oil Co Inc	\$58,776.00	07 Dec 2017	08 Sep 2021	07 Dec 2021	96%		
ACTIVE	Agric. Grounds & Ro...	Alamo Sales Corp	\$108,535.00	22 Jan 2018	24 Oct 2021	22 Jan 2022	93%		
ACTIVE	Soil Prep	Fraser Inc.	\$0.00	28 Apr 2021	28 Feb 2024	28 Apr 2024	15%		
ACTIVE	Radiation Safety Trai...	Engelhardt & Associ...	\$161,081.00	23 Dec 2018	07 Nov 2021	22 Dec 2021	93%		
ACTIVE	Grounds & Roads	Power Equipment Di	\$808,535.00	11 Jan 2020	12 Oct 2021	10 Jan 2022	07%		

Scroll to see more

Note: If you have the **Vendor Performance Management** module enabled, and performance scores have been recorded for a vendor, a coloured dot will appear next to the Vendor's name. The colour of the dot is associated with the rating of the Vendor's performance.

Before we move on here's a quick breakdown of the different contract statuses:

**Pending** - used until the contract reaches its current Term Start Day,

**Active** - contract is active and taking submissions for the period of time initially setup

**Expired** - contract is "closed" and there isn't intended to renew

**Term Expired** - the current contract term is expired and can be auto-renewed if the setting is enabled

**Terminated** - status reserved for when Org Admins cancel the contract manually

If you click on the **Show/Hide** button it will allow you to configure which fields to display in the columns (your selections will also save and persist for the next time you access it):

Contracts (27)

Add ContractImport

Type: AllBulk ActionsShow/HideDownloadSearch...

<input type="checkbox"/>	Status	Contract	Vendor	Value	Start Date	Lead Date	End Date	Progress
<input type="checkbox"/>	PENDING	Electronic Monitorin...	Htc Global Services ...	\$10,748.00	27 Oct 2021	18 Aug 2022	16 Nov 2022	0%
<input type="checkbox"/>	ACTIVE	Boots	Demo Inc	\$0.00	05 Nov 2019	06 Aug 2021	04 Nov 2021	97
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<input type="checkbox"/>	ACTIVE	Grounds & Roads in	Power Equipment Di...	\$808,535.00	11 Jan 2020	12 Oct 2021	10 Jan 2022	97

☒ Status  
☒ Contract  
☐ Department  
☐ Project  
☒ Vendor  
☐ Vendor Documents  
☐ Contract Type  
☒ Value  
☐ Currency  
☐ Description  
☐ Notes  
☒ Start Date  
☒ Lead Date  
☒ End Date  
☒ Progress  
☐ People  
☒ Renewable

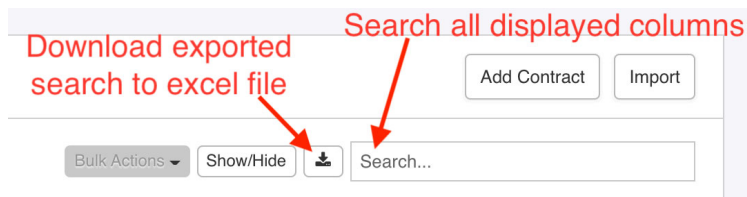
If you click on the filters beside each column name, you will be able to search through your contracts by values that are unique to that column. For example, you can filter the **Value** column by dollar amount.

**NOTE:** Any Custom Fields you create can be viewed in this chart (see [Contract Settings - Custom Contract Fields and Contract Types](https://support.gobonfire.com/hc/en-us/articles/222784288-Contract-Settings-Custom-Contract-Fields-and-Contract-Types) (<https://support.gobonfire.com/hc/en-us/articles/222784288-Contract-Settings-Custom-Contract-Fields-and-Contract-Types>) to learn more).

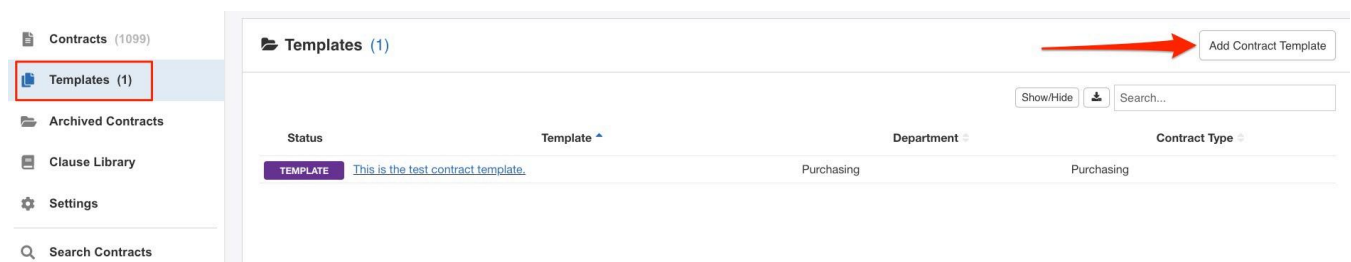
The option to show which contracts have expired Vendor Documents can be toggled on using the Show/Hide button.

Next to the **Show/Hide** button is a **Bulk Actions** dropdown. This allows you to add or remove people en masse to multiple contracts (see [Bulk Editing Contracts](https://support.gobonfire.com/knowledge/articles/360009014034/en-us?brand_id=1302036) ([https://support.gobonfire.com/knowledge/articles/360009014034/en-us?brand\\_id=1302036](https://support.gobonfire.com/knowledge/articles/360009014034/en-us?brand_id=1302036))).

On the other side of the **Show/Hide** button is a download button icon. Clicking this will allow you to download an Excel spreadsheet containing all fields that are currently displayed in the Contracts window. If you have defined a specific search string in the search bar, it will display only the search results along with all fields you have listed as "shown" (made visible).



**Templates** is a place that can hold all of your contract templates and allows you to add new contract templates. A template can be used as a starting point when creating a number of contracts with similar attributes. For more information on **Templates**, see our article on [How to Create a Contract Template](https://support.gobonfire.com/hc/en-us/articles/360001023794). (<https://support.gobonfire.com/hc/en-us/articles/360001023794>)



The **Archived Contracts** section will hold contracts that were manually added to this area should you not want it to appear in your contracts chart:

Contracts (1099)

Templates (1)

Archived Contracts

Clause Library

Settings

Search Contracts

Archived Contracts (1)

Type: All

Show/Hide

Search...

Status

Contract ID

Contract

Depart...

Project

Vendor

Value

Start Date

Lead Date

End Date

EXPIRED

114539

Species And Individual Geneti...

Purchasing

Wildlife Genetics International

\$119,537.00

08 Nov 2018

23 Sep 2021

07 Nov 202

The **Settings** section is where you can define Custom Contract Fields and Contract Types (<https://support.gobonfire.com/hc/en-us/articles/222784288>):

Contracts (1099)

Templates (1)

Archived Contracts

Clause Library

Settings

Search Contracts

Custom Contract Fields

Contract Types

Custom Contract Fields

Custom Contract Fields allow you to add your own Fields to a Contract beyond the default attributes in Bonfire. If you assign a Custom Field to one or more Contract Types, it will be available when creating Contracts of only those specific Contract Types, otherwise it will be available for all Contracts.

Add a Custom Contract Field

Show/Hide

Search...

Field Name	Value Type	Value Options	Contract Types	Required?	Adjustable?	Public	Allow Multiple Options?	Actions
DBE Status	Short Text			✓	✗	✗	✗	Actions
Department Comme...	Long Text			✗	✗	✗	✗	Actions
End Date	Date			✓	✓	✓	✗	Actions
Sourcing Type	Short Text			✗	✗	✓	✗	Actions
Spend Comments	Long Text			✗	✓	✗	✗	Actions
Start Date	Date			✓	✓	✓	✗	Actions
Value	Number			✓	✓	✗	✗	Actions

The final section of the Contracts dashboard is the **Search Contracts** section where you can easily search for contract names, contract details (excluding Custom Contract Fields and values), People, and Contract documents. To learn more, see Search Contracts (<https://support.gobonfire.com/hc/en-us/articles/360001859573-Search-Contracts-Tool->).

Contracts (1099)

Templates (1)

Archived Contracts

Clause Library

Settings

Search Contracts

Search Contracts

Search...

You can search for details, documents and people

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**Title**

Contracts Dashboard Overview

Bonfire

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