Softrader Documentation - Contract_Review_Feature_Announcement
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Contract Review – Structured Question Trees for Jobs

Softrader Cloud – New Feature

February 2026

What Is It?

Contract Review is a new module that lets you build structured checklists of questions that must be answered before a job progresses through your workflow. Instead of relying on memory or ad-hoc notes, your team works through a guided questionnaire — and the system can optionally block certain actions until the review is complete.

How It Works

Templates and Branching Logic

Administrators create **Contract Review Templates** — reusable sets of questions organised in a tree structure. Questions can branch based on previous answers, so users only see what's relevant to their job.

For example:

- "Does this job require NDE?" → **Yes**
- Follow-up: "Which NDE methods?" → **RT, UT**
- Follow-up: "RT Standard?" → appears only because RT was selected

Questions support four answer types: **Yes/No/N/A**, **Single Choice**, **Multiple Choice**, and **Free Text**.

Versioning

Templates are versioned. When you update a template, a new version is created — existing jobs keep the version they were assigned, so historical reviews are never altered. This is important for audit and compliance purposes.

Completing a Review

Users open the Contract Review from within the job screen. Answers save automatically as you work, so you can come back to it at any time. Once all required questions are answered, the review can be submitted. A completed review is locked and records who completed it and when.

A **PDF** of the completed review can be downloaded at any point after submission.

Hold Points (Optional Gating)

Administrators can configure **hold points** on a template to block specific actions until the review is complete:

Hold Point	What It Blocks
Process Job	Job cannot be processed to the next stage
Purchase Order	PO documents cannot be created
Acknowledgement	Order acknowledgements cannot be created
Pick List	Pick lists cannot be created
Delivery Note	Delivery notes and invoices cannot be created

Hold points are entirely optional — you choose which (if any) to enable per template.

Job Category Auto-Assignment

Templates can be linked to job categories. When a user creates a job and selects a category, the correct Contract Review is assigned automatically — no manual selection required.

Key Points

- **No impact on existing jobs** — the module uses its own data tables and does not modify your existing job or order data.
- **Full audit trail** — every answer, change, completion, and reopening is logged with timestamps and user details.
- **Permission-controlled** — separate permissions for managing templates and completing reviews.
- **Reopenable** — completed reviews can be reopened for amendments if needed, with full audit logging.
- **Feature toggle** — the module is enabled per tenant via a system variable, so it can be switched on when you're ready.

Getting Started

1. **Enable the feature** — ask your administrator to turn on Contract Review in system settings.
2. **Build a template** — go to Settings → Contract Review Templates and create your first question tree.
3. **Test it** — use the built-in Test mode to walk through the questions without affecting any real jobs.
4. **Link to job categories** — optionally set a default template per job category for automatic assignment.
5. **Configure hold points** — decide which job actions (if any) should be blocked until the review is done.

For detailed usage instructions, refer to the full **Contract Review User Guide**.