

Getting started

Review contracts, prepare and assess claims, and give notices before the time bar runs. This guide takes you from your first sign-in to your first overnight notice.



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For project managers, commercial managers, quantity surveyors and contract administrators.

1 Before you start

You need three things:

- **An invitation or a sign-up** using your work email address.
- **Your company Microsoft account**, the one you use for Outlook and Teams. There are no new passwords.
- **A current web browser** on a computer, tablet or phone. Nothing is installed.

Some companies ask their IT team to approve new apps once before anyone can use them. If yours does, the first sign-in tells you so. Send your IT team the *Set-up guide for administrators*; it takes them about two minutes.

Using a personal email address?

If you were invited with an address such as Gmail or Outlook.com, use **Sign in as a guest** under the sign-in button instead.

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2 Sign in

- 1 Go to entitleworks.ai and choose **Sign in**.
- 2 Choose **Sign in with Microsoft** and pick your work account.
- 3 The first time, Microsoft asks you to allow EntitleWorks to sign you in. Choose **Accept**.
- 4 You arrive on **Home**. That is it.

If sign-in stops

The message *Your company's IT team needs to approve EntitleWorks once* means the approval is on your company's side. Nothing is wrong with your account. Forward the administrator guide to IT, or reply to your invitation and we will contact them for you.

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3 Find your way around

There are three places, always in the same spot. On a phone they sit in a tab bar at the bottom of the screen.

Place	What it is for
Home	Work that is running, results you have not opened yet (at most three), your projects, and the button to start something new.
Your work	Everything you have done, in three tabs: Reviews, Claims and Notices, each grouped by project. Notices show their deadline and whether they were sent.
Settings	Your plan, your letterhead and templates, and the systems you have connected.

On a wide screen, a rail on the left also lists your 12 most recent pieces of work, grouped by project, with a dot that shows whether each is running, new or ready. Your browser's back button stays inside EntitleWorks, so you can move around freely.

Help on every screen

Choose the ? at the top of any screen, or press the ? key, for one-line tips about that screen and links to these guides.

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4 Set up a project and its executed contract

A project keeps the signed contract and everything done under it together. Once the executed contract is marked, every later claim and notice on that project uses it automatically, so you add it only once.

- 1 On **Home**, choose **Start something new**, then **Review a contract**.
- 2 Choose who you act for, then the project. For a new project, pick it from the list or type its name, for example *Marina Hotel Package B*.
- 3 Add the complete contract: agreement, conditions, particular conditions and schedules, all together. PDF, Word or a ZIP file all work.
- 4 When the review is finished, open it and choose **Mark as the executed contract**. The project card on **Home** now shows it.

Good to know

Mark the version that was actually signed. If the contract is later amended, review the amended version and mark that one instead. Until a project is fully set up, a **Get started** card on Home walks you through these steps.

To rename or delete a project, use the ... menu on its card. Deleting a project can keep its work (moved out of the project) or delete the work too.

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5 Review a contract

A review reads the whole contract for your side and returns the risks, suggested amendment wording, and the notices you must diarise. It usually takes about 20 minutes, and you can close the page while it runs.

When it is ready:

- For each issue, choose **Accept**, **Change** or **Reject**. Your decisions build the registers and the Schedule of Departures, so nothing has to be retyped.
- Open **Registers** for the Rights and Obligations register and the Notices and Time Bars register.
- Choose **Download all** for the report, every register and the Schedule of Departures in one ZIP file, in Word and Excel.
- Choose **Ask Jono** to ask a question about the documents. Answers come with page references.

Change a decision at any time and download again; the files are rebuilt from your latest decisions.

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6 Prepare or assess a claim

- 1 Choose **Start something new** , then **A claim** , then **Prepare a claim** or **Assess a claim** .
- 2 Choose who you act for and the project. The executed contract is used automatically (**Using the executed contract**).
- 3 Under **Add the project records** , add letters, notices, minutes, diaries, reports and the programme. A ZIP export from Aconex or TeamBinder works too. To assess a claim, include the claim you received.
- 4 Choose **Start** .

Each claim comes with notice compliance, a Scott schedule, a chronology and an evidence list. Amounts are only shown where they were found in the records you added.

Every event is also tested against the **EntitleWorks claim method**: eight principles that assessors apply, from contractual entitlement and notices to cause and effect, records, concurrency, quantum and presentation. Each event shows **Claim readiness: N of 8 principles met**, with what would close each gap; the same table is in the claim document and the Excel workbook.

Delay claims

Add the baseline and the latest updated programme: Primavera P6 (.xer), Microsoft Project (.xml) or Excel. EntitleWorks compares them and calculates the critical path from the logic. Forensic delay analysis stays with your planners.

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7 Give or reply to a notice

- 1 Choose **Start something new** , then **A notice** , then **Give a notice** or **Reply to a notice** .
- 2 Under **What happened?** , write one or two sentences in your own words. Dates help.
- 3 Under **How should it read?** , choose **Neutral** , **Collaborative** or **Firm** .
- 4 Add any letters or records that support it, then start.

The result shows the letter, the deadline calculated from the contract, how the notice must be served, and anything to fix before you send it.

- **Edit the wording** lets you change the letter. **Download in Word** puts it on your letterhead.
- Once the letter has gone, choose **Mark as sent** . Deadline reminders for that notice stop, and your notices-sent count on **Home** goes up.

Nothing goes out in your name

EntitleWorks never sends a notice. You review it, download it and serve it the way the contract requires.

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8 Automatic notices overnight

Once a project has its executed contract, EntitleWorks can read the project's new correspondence every day after a cut-off time. It keeps only contractual correspondence that puts you at risk, and drafts the notice or reply against the executed contract, ready for you in the morning.

- 1 On **Home** , find the project card. It shows **Automatic notices are off** . Choose **Turn on** .
- 2 Choose where the project's letters arrive: an Outlook folder, a Procore correspondence type, an Aconex mail box, or **Letters I forward by email**.
- 3 Choose the cut-off time (between 12:00 and 22:00), when the drafts should be ready (between 06:00 and 09:00), the most drafts per night, and the tone.
- 4 Save. A morning email lists what was drafted.

Each project watches one place. Drafts appear on the project card under **Drafted overnight** and are marked as such in **Your work** . Nothing is ever sent automatically.

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9 Forward letters by email

Every project can have its own email address, in the form **files+code@entitleworks.ai**. Choosing **Letters I forward by email** when you turn on automatic notices shows it, with a button to copy it. Forward a letter to it, or copy it in when the letter is first sent, and it is read at the next cut-off with the PDF or Word attachments.

- It works with any document system, TeamBinder included, with nothing to connect.
- Only mail from you or colleagues at your company's email domain is accepted. Anything else is ignored.
- Letters that Procore or Aconex email out for you may come from their address rather than yours, and would then be ignored. For those systems, connect them directly instead.

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10 Time-bar reminders and your backup

For every notice with a deadline, the person who owns it gets an email 7, 3 and 1 days before the deadline, on the day, and once if it becomes overdue.

From one day before, your project's **backup** and your company admins are told as well, so a missed time bar needs more than one person to miss it. Choose the backup on the project card, under **If a deadline gets close, also tell**; it must be a colleague who uses EntitleWorks.

On **Home** you also see, across your projects: time bars overdue, deadlines in the next 7 days, notices sent, and amounts claimed by you and against you. Only amounts found in the records count; nothing is estimated.

This week on site

Each project has a **This week on site** button, and the same brief arrives by email on Sunday morning: the week's deadlines, your regular duties under the contract, and the site events that start a notice period.

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11 Connect your document systems

In **Settings**, under **Connected systems**, choose **Connect** next to Microsoft 365, Procore or Aconex and sign in once. You can then pick contracts and records straight from that system, and use it for automatic notices.

System	What you can use
Microsoft 365	OneDrive, SharePoint and Outlook folders.
Procore	Project documents and correspondence. Your company admin installs EntitleWorks in Procore first.
Aconex	Project mail and documents. Your company admin registers EntitleWorks with Aconex first.
TeamBinder	Forward letters by email, or upload its ZIP exports.

EntitleWorks only reads. It never sends, changes or deletes anything in your systems. **Disconnect** removes the connection at once.

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12 Your letterhead and templates

In **Settings**, under **Your letterhead and templates**, upload your company letterhead and your report or claim template as Word files. Every notice, reply, claim and report you download is then built inside them: your logo, header, footer, fonts and margins.

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13 Credits and notices

You always know the cost before you start.

Work	Uses
Contract review, whatever its length	1 credit
Claim, prepared or assessed	2 credits
Notice or reply, by hand or overnight	1 from your monthly notice allowance (no credits)
Overnight reading of correspondence, questions to Jono	Nothing

If a job fails, its credits come back automatically. Your balance is in **Settings**, under **Your plan**. If your team needs more credits, ask your company admin to top up.

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14 Your data

- Your work is visible only to you.
- Deleting a piece of work (the **Delete** button at the top of it) erases its files from our server at once. Database backups roll off within 14 days.
- Your documents are never used to train AI.
- Connections are read-only and can be removed in one click.

EntitleWorks gives commercial decision support. It is not legal advice.

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15 If something goes wrong

You see	What to do
<i>Your company's IT team needs to approve EntitleWorks once</i>	Send IT the administrator guide, or reply to your invitation.
<i>Please sign in with your work account, not a personal Microsoft account</i>	Use your company account, or Sign in as a guest if you were invited with a personal address.
<i>Procore refused access. Connect again in Settings.</i>	Your connection expired. Choose Connect again in Settings .
<i>Your Procore account cannot see this</i>	Ask your Procore admin for access to that project or tool.
<i>A forwarded letter was not picked up</i>	Check it came from your company address and went to the project's own address. It is read at the next cut-off, not straight away.
<i>Reminders keep coming for a notice you sent</i>	Open the notice and choose Mark as sent .

Anything else: email han@entitleworks.ai.

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EntitleWorks gives commercial decision support, not legal advice. Screens and labels may change as the product improves; this guide was issued October 2026.