

Costapp

Getting started for contractors and subcontractors

A friendly, step-by-step guide to creating an account, setting up the correct project relationship and inviting the other contracting party.

I act for the Contractor

Create the Client-to-Contractor project, add subcontractor packages to the Supply Chain, then invite named subcontractor contacts.

I act for the Subcontractor

Create the Contractor-to-Subcontractor project, enter both company names, then invite a named contractor contact.

- ✓ Use your normal work email address
- ✓ Choose the party your company acts for
- ✓ Invite named people using their own work email

01

Before you begin

Allow about 10 minutes. Keep the signed contract, subcontract or purchase order nearby.

- ✓ **Your work email** Use an address only you can access.
- ✓ Your company's full legal name
- ✓ The other contracting party's full legal name
- ✓ Project title and contract or subcontract reference
- ✓ Value, start date and completion date
- ✓ **Form of contract and main option** If unsure, check the signed agreement.
- ✓ The other party's named contact and work email

One shared workspace per contract

Agree which party will create the Costapp project. Invite the other party into that workspace. Do not create two separate projects for the same contract, because the records will not merge automatically.

Choose your route**I act for the Contractor**

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02

Create or join a Costapp account

Open costapp.co.uk in Microsoft Edge, Google Chrome or another modern browser.

1

Start or sign in

To create a new customer account, select Start free trial. If you have already been invited to a project, open the invitation link instead.

2

Use your work email

Select Continue with work email, enter your work address and follow the secure sign-in instructions sent to you.

You do not need a ChatGPT account.

3

New customer, enter your company name

Enter the full legal company name, choose Costapp Solo or Costapp Team, accept the business terms and complete secure checkout. Companies needing a purchase order can select Request invoice billing.

4

Invited participant, accept the project

Use the same email address that received the invitation. An external project guest does not use one of the inviting company's paid internal seats.

Keep every login personal

Invite each person using their own work email. Do not share one login between several people. This protects the project history and audit trail.

If the email does not arrive

Check Junk, Spam and your company's email quarantine, then try Continue with work email again.

03

Contractor route, create the main project

Use this route when your company holds the main contract with the Client and will manage its subcontractors in Costapp.

1

Choose Live project

Use Live project for a real job. Use Test project only for training, because automated project emails are suppressed in test mode.

2

Enter the project identity

Add Project title, Contract / project reference and Project value. Business division and Framework are optional reporting labels.

3

Choose Contractor

Under Who do you act for?, select Contractor.

Costapp should then ask for Client and Contractor company names.

4

Name the main contracting parties

Enter the employer in Client company name and your company in Contractor company name.

5

Add contract details and dates

Select the Form of contract and Main option, add applicable delay damages and enter the key dates. Then select Create project workspace.

6

Add the subcontractor package

Open Supply Chain, add the subcontractor's company, trade, order reference, subcontract form, option, value and dates. Save the package before inviting its contact.

Important check

The project should say that your Costapp team acts for the Contractor. The subcontractor must be added to Supply Chain before you can assign a contact to its package.

04

Subcontractor route, create the subcontract project

Use this route when your company is the subcontractor and wants to manage its own subcontract records with the contractor.

1

Choose Live project

Use Live project for a real subcontract. Use Test project only for training.

2

Enter the project identity

Add Project title, Subcontract / project reference and Subcontract value. Business division and Framework are optional.

3

Choose Subcontractor

Under Who do you act for?, select Subcontractor.

This is the most important choice on the page.

4

Name both contracting parties

Enter the main contractor in Contractor company name and your own company in Subcontractor company name.

5

Add subcontract details and dates

Select the Form of contract and Main option shown in the signed subcontract. Add applicable delay damages and enter the key dates.

6

Create the workspace

Check that Costapp says your project team acts for the Subcontractor, then select Create project workspace.

Important check

The contracting parties should read Contractor and Subcontractor. If you see Client company name, go back to Who do you act for? and select Subcontractor.

05

The two routes at a glance

Use this page as a quick check before you create the project or send an invitation.

Costapp question	Contractor route	Subcontractor route
Who do you act for?	Contractor	Subcontractor
First company box	Client company name	Contractor company name
Second company box	Contractor company name	Subcontractor company name
Other party is added	After the project, in Supply Chain	Directly in Project team & access
Invited contact represents	Subcontractor, select their package	Contractor

The party choice controls official records

Contract party represented controls the From and To direction on notices, replies, quotations and project communications. Project responsibility controls what the person is allowed to do.

Use the signed agreement

Enter company names exactly as they appear in the signed contract or subcontract.

Use the correct contract form, main option, value and dates.

Costapp organises the project record, but it does not replace the signed agreement.

06

Invite the other contracting party

Open the project, go to Project team & access and find Add a project participant.

1

Enter a named person

Add their Name and Work email. Use the exact address they will use to sign in.

2

Choose their responsibility

Quantity Surveyor suits day-to-day commercial work. Commercial Manager can also manage project access and team members. Director has full visibility and CVR approval, with commercial records read-only.

3

If you are the Subcontractor

For Which contract party do they represent?, select Contractor.

4

If you are the Contractor

Select Subcontractor, then choose the correct subcontractor package from Supply Chain.

5

Send the invitation

Select Send project invitation. If company email filters it, use Resend email or Copy link and send the secure link directly.

What the invited person should do

Open the invitation, sign in with the same invited work email and choose Continue with work email if they do not use ChatGPT. Check that YOU ARE ACTING FOR shows the correct party.

Who can add project participants?

The project owner, Project Manager and Commercial Manager can manage the project team.

Quantity Surveyors, Directors and Project Team Members do not see the Add a project participant box unless their responsibility is changed.

07

Final checks and quick help

Complete these checks with a contact from each contracting party, if possible.

- ✓ The project names the correct contracting parties
- ✓ Your screen says YOU ARE ACTING FOR the correct party
- ✓ The other party's named contact appears in Project team & access
- ✓ The invited person signs in with the exact invited email
- ✓ The invited person's screen shows the correct party
- ✓ Both parties can open the same project and see its reference

If something does not work

"Username not found"	Choose Continue with work email. A ChatGPT account is not required.
No invitation email	Check Junk, Spam and company quarantine, then use Resend email or Copy link.
Project not visible	Sign out and use the exact email address that received the invitation.
No participant box	Ask the owner, Project Manager or Commercial Manager to add the person.
Wrong party shown	Ask a team manager to correct Contract party represented in Project team & access.

Still need help?

Email kevin.morley@costapp.co.uk and include the project name, the email address being used and a short description of what is on the screen.