

QUICK GUIDE

CONTRACT WRITER



CONTRACT WRITER

1. Use a template in contract, open Contract, and select Contracts Tab.

ID	Description	Type	Status	Approval	Contract	Vendor	Current	Paid to
7400001214	223124 Test	Material c...	Executed	Not ap...	Success	Business C...	\$1,960...	\$8,378.00

2. Select a contract ID to pen a contract.

<input type="checkbox"/>	7400001254	AB Structural	Material con...	Draft	In appro...	
<input type="checkbox"/>	7400001253	Structural St...	Material con...	Draft	Not start...	

3. The contract Details Opens for the selected contract

Details

Contract status: Draft

Approval status: Not approved

Additional details

Generate contract document

4. From the Actions drop-down menu, select **Generate contract document**.

Actions

- View import history
- Generate contract document
- Run report

5. Select the template type from the submenu. Only template types applicable to the Contract tab you are currently on are enabled.
6. Move one or more templates from the available templates column to the selected templates column

CONTRACT DETAILS

Select contract templates

Contract template details

Individual Documents

In the Contract template details section choose one:

- **Individual Documents** to get a separate document for each template you selected.
- **Merged document (PDF only)** to merge the templates into a single PDF document.

1. Use the toggle to indicate whether to save the contract in supporting documents tab. Add the name of the document
2. Select the watermark text. (required at Organization-level)
3. Click **Next**

NOTE: Choose the template you want to review from the Review templates list. The template tags display as fields in the display area.

CONTRACT REVIEW

The Review templates dialog box lets you edit or add information to the fields that populate the document after it is generated

1. Make changes and additions to the contract information.

Review templates

Template Name

Project ID

Contract ID

Company code

Blank1

Vendor name

Company code name

Vendor address

Preview document

1. After you have reviewed all changes. Click the **Preview document button**.
- If you selected Download as a PDF the preview contains all of the templates in the order you specified
- If you selected Download as individual documents when you generated the document, the preview contains only the template that was displayed when you clicked preview document
3. Click Finish

NOTE: Changing data in Review contract fields updates the data published in the contract document but does not update the data field in Contract.