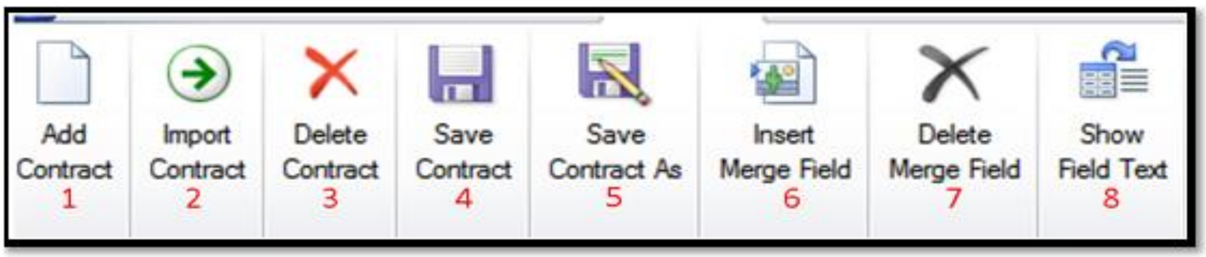
LEARNING THE CONTRACTS TAB

Hi and welcome to this tutorial on "Contracts". This tutorial is going to show you each function and their uses that reside in the Contract tab bar.

The Contracts tab offers 16 different options to choose from. The first 10 in order are Add Contract, Import Contract, Delete Contract, Save Contract, Save Contract As, Inset Merge Field, Delete Merge Field, Show Field Text, Show Preview, and Spell Check. The next 3 are grouped into 'Find Contracts' and the last 3 are Print Contract, Email Contract and Close Contract.

Lets have a look at the first eight functions



1. **'Add Contract':** Is used to create a new contract to be added to the contract templets. Which allows you to use at any time for any estimate.

2. **'Import Contract'**: Is used if you have a contract saved on your computer you would like to be included in to your estimate. Select 'Import Contract' and you will be directed to your file manager where you can locate your contract.

3. **'Delete Contract':** An estimate can have several contracts, the 'Delete Contract' allows you to choose which ones you want to delete from the estimate.

4. **'Save Contract':** When choosing a contract to use with your existing open estimate, use the 'Save Contract' option to save the contract to the current estimate you are working with.

5. **'Save As':** When creating a new contract or editing one of the existing template contracts, use the 'Save As' option to give it a new name adding it for future use to the template menu.

6. **'Insert Merge Field**': When editing or creating a contract, while in 'show field text mode' select an area on the contract that you would like to add a merge field and select 'Insert merge field'.

7. '**Delete Merge Field':** Allows you to delete a merge field in your contract you do not want to keep. Select the merge field on the contract and select "Delete Merge Field"

8. **'Show Field Text':** Shows where all your merge fields are. Merge fields are actually place holders that tell the program what data needs to be placed there for example: {Client Name} If you click 'Show Preview', where all the place holders are will now show the actual data from your estimate. When you click on 'Show Field Text' you can edit any of the merge fields.

Now lets look at the last eight sections of the contracts tab.

9. **'Show Preview':** After selecting all merge fields to be added to your contract select "Show Preview" and all fields will be filled in automatically showing you what your completed contract will look like.

10. **'Spell Check':** When finished creating your contract, selecting "Spell Check" will show you all incorrect spelling errors, then give you the chance to correct them.

The next three are grouped together in the section called 'Find Contracts'. Use 11 thru 13 to better assist you in locating an existing contract.

11. **'By Estimate':** Locating a contract using the estimate title.

12. **'By Customer':** Locating a contract using the customer's name

13. **'By Title'**: Locating a contract using the contract name

14. **'Print Contract'**: Use this option to print a contract listed in this section

15. **'Email Contract'**: Use this function to email a contract to your customer

16. **'Close Contract'**: When you are done with your contract, or if you choose to use a different one be sure to close the current contract open to prevent any confusion later on.