CONTRACT WRITER

InEight® CONTRACT
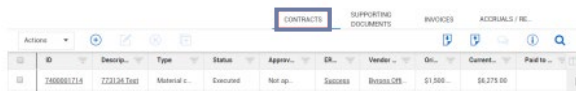
CONTRACT WRITER
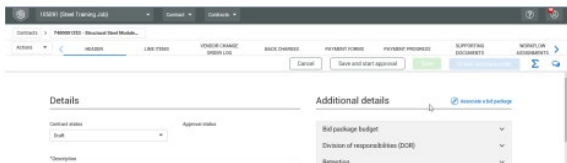
1. Use a template in contract, open Contract, and select Contracts Tab.
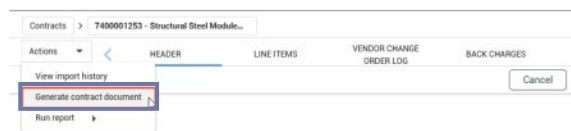

2. Select a contract ID to open a contract.

3. The contract Details opens for the selected contract.

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

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
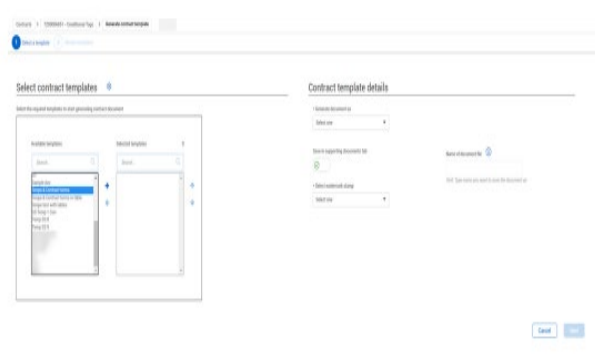
In the Contract template details section choose one:

- **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 all changes and additions to the contract information.
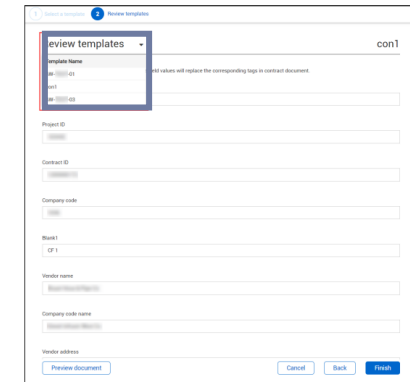
After you have reviewed all changes, click the **Preview document button.**

- 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.