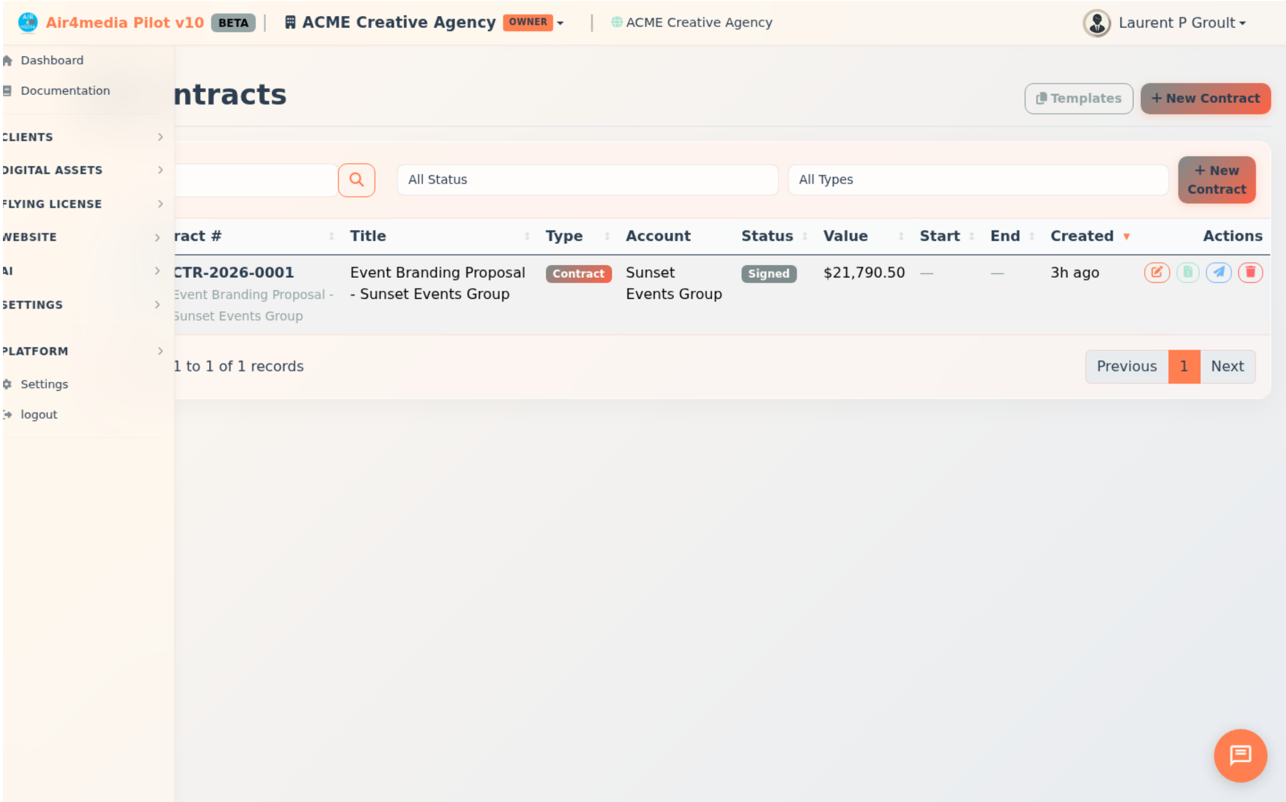

Contracts

Create, send, and sign business contracts — all in one place. Manage the full contract lifecycle from draft to completion, with built-in digital signatures and invoice generation.

Key Features

- **Contract Editor**: Full-screen editor with three panels — contract details on the left, HTML content in the center, and signatures on the right
- **Contract Types**: Contracts appear as Contract, Questionnaire, Subcontract, Lead Form, or Proposal — filter by type to find what you need
- **Templates**: Save and reuse contract templates (General, NDA, Service Agreement, SOW, Rental, Event) with dynamic variables that auto-fill with contract details
- **Digital Signatures**: Both you and your client can sign directly in the browser using a signature pad — works with mouse or touchscreen on any device
- **Status Tracking**: Track every contract through its lifecycle — Draft, Sent, Signed, Active, Completed, Void, or Expired
- **PDF Download**: Download a PDF copy of any contract that has been generated
- **Invoice Generation**: Convert a signed or active contract into an invoice with one click
- **Account & Project Linking**: Associate contracts with accounts, projects, and contacts for

full CRM context

How to Use

Create a Contract

1. Click **New Contract** in the top bar
2. Enter a title and select the account — a contract number is assigned automatically (e.g., CTR-2026-0001)
3. Optionally link a project and contact
4. Set start and end dates and a total value
5. Add internal notes (visible only to you)
6. Write the contract body in HTML, or select a template to auto-fill the content
7. Click **Save Contract** to save as a draft

Use Templates

1. Click **Templates** to manage your saved templates
2. Create a template using HTML and placeholder variables that auto-replace when applied:
    - `{{account_name}}`, `{{contact_name}}`, `{{contract_number}}`, `{{contract_title}}`, `{{total_value}}`, `{{start_date}}`, `{{end_date}}`, `{{today}}`, `{{year}}`
3. When editing a contract, select a template from the dropdown and click **Apply Template** to replace the contract body

Send to a Client

1. Open a draft contract and review the content
2. Click **Send to Client** in the footer — the contract saves automatically and the status changes to **Sent**

Sign a Contract

1. Open a contract and go to the **Signatures** panel on the right
2. Draw your signature on the Provider pad, enter your printed name, and click **Sign as Provider**
3. To record the client's signature, draw it on the Client pad and click **Record Client Signature**
4. Once both parties have signed, the status updates to **Signed** automatically

Generate an Invoice

1. From the list, click **Generate Invoice** in the row actions of a signed or active contract
2. An invoice is created and linked to the contract — you'll be prompted to open it immediately

Download a PDF

Click **PDF** in the contract editor header, or use the **Download PDF** row action in the list (only available when a PDF has been generated).

Void a Contract

1. Open any sent, signed, or active contract
2. Click **Void** in the footer — the contract is cancelled and marked as Void

Tips

- Use the **Preview** toggle in the editor to see the formatted contract before sending; existing contracts open in Preview mode by default
- Filter the list by **Status** or **Type** to quickly find specific contracts
- Search by contract number or title; click any column header to sort
- Select multiple contracts with the checkboxes to delete them in bulk
- Send a contract directly from the list using the row **Send** action — no need to open the editor first
- Contracts created from a project page automatically pre-fill the account and project fields
- The signature pad works on mobile and tablet — clients can sign on any device; each signature records the date and time for your records
- When both parties sign, any connected automations are triggered automatically
- Default system templates cannot be deleted — only custom templates you create can be removed