

# Export Options Guide (PDF/Word) (1 of 6)

## Export

PDF / Word JSON

**Include In Header:**

Unique Reference

Company logo

Company Name

**Sections:**

RISK DETAILS

Restart page numbering

Remove page breaks

PLACING DATA

INFORMATION

SUBSCRIPTION AGREEMENT

Restart page numbering

Remove page breaks

FISCAL AND REGULATORY

Restart page numbering

Remove page breaks

BROKER REMUNERATION AND DEDUCTIONS

Restart page numbering

Remove page breaks

SECURITY DETAILS

**Settings:**

Custom top margin?

Blank pages after stamps?

One underwriters agreement per page? ⓘ

Include Internal Review Details

Include Attachments (PDF only)

Defined Data Supplementary Document

Questionnaire

Apply Draft Watermark

Add Page Numbers

Include Date/Time

**File Format:**

PDF

Word

**Font Style:**

Sans-serif

Serif

**Alignment:**

Align with top of Heading

Align with bottom of Heading

**Line Item Heading:** ⓘ

Font Size:

**Stamp Layout:** ⓘ

Naturalistic (Default)

Horizontal

**Proceed**

1. These tick boxes control the elements that appear in the exported document's header- the contract's unique reference, the broking company logo and broking company name.
2. This section controls which Section Headings and their associated contract headings will appear in the finalised export.
3. For each included Contract Section there is the option to restart page numbering at the beginning of that section. **Please note:** this functionality will only work if 'Add Page Numbers' is ticked in the settings section (detailed on pg. 3).
4. This option allows for the removal of page breaks between this section and the next. **Please note:** the final section does not have this option as there are no page breaks after that point.

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**Export** [X]

PDF / Word JSON

**Include In Header:**

Company logo

Company Name

**Sections:**

RISK DETAILS

- Restart page numbering
- Remove page breaks

PLACING DATA

INFORMATION

SUBSCRIPTION AGREEMENT

- Restart page numbering
- Remove page breaks

FISCAL AND REGULATORY

- Restart page numbering
- Remove page breaks

BROKER REMUNERATION AND DEDUCTIONS

- Restart page numbering
- Remove page breaks

SECURITY DETAILS

**Settings:**

Custom top margin? 4

Blank pages after stamps? 1

One underwriters agreement per page? ⓘ

Include Internal Review Details

Include Attachments (PDF only)

Defined Data - Supplementary Document

Questionnaire

Apply Draft Watermark

Add Page Numbers

Include Date/Time

**File Format:**

PDF

**Font Style:**

Sans-serif

Serif

**Alignment:**

Align with top of Heading

Align with bottom of Heading

**Line Item Heading: ⓘ**

Font Size: 11pt

**Stamp Layout: ⓘ**

Naturalistic (Default)

Horizontal

**Proceed**

5. Use the arrows or type a number in the box to determine the size of the custom top margin.

Please note: the option to adjust the margin only becomes available if the company logo is not included in the header.

6. Exporting with one stamp per page places each participant's stamp/s together on a single page of the exported document.

Each stamp page contains a full copy of the contract heading and its text to ensure there are no gaps in the contract.

7. This checkbox determines if blank pages are included in the document after the 'Written Lines' contract heading, detailing underwriter's stamps.

Type a number or use the arrows to adjust the number of blank pages to be included. Please note: if there are a large number of stamps these will automatically run onto a second page.

8. Checking this box includes the name of the reviewer along with the date and time the review was completed in the centre of the lower margin on the last page.

9. This option is automatically selected for PDF exports if the contract has attachments uploaded in the 'Attachments' panel. Deselect it to export the contract without them

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10. Select this checkbox to include a separate document containing a list of the Defined Data included in the contract, organised by contract heading, tag field name, and tag value.

11. Select this option to include the contract's extended data Questionnaire in the export as a separate document. This is only available if your contract includes a Questionnaire.

12. This checkbox adds a 'DRAFT' watermark to every page, ensuring there is no confusion between this and the final version,  
  
Please note: this option can only be selected while the contract is at the draft stage.

13. This checkbox controls whether the exported contract includes page numbers.

14. Ticking this includes a message in the bottom left margin of each page, stating 'Document Generated:' with the exact time and date of generation.

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## Export

PDF / Word      JSON

**Include In Header:**

Unique Reference

Company logo

Company Name

**Sections:**

RISK DETAILS

- Restart page numbering
- Remove page breaks

PLACING DATA

INFORMATION

SUBSCRIPTION AGREEMENT

- Restart page numbering
- Remove page breaks

FISCAL AND REGULATORY

- Restart page numbering
- Remove page breaks

BROKER REMUNERATION AND DEDUCTIONS

- Restart page numbering
- Remove page breaks

SECURITY DETAILS

**Settings:**

Custom top margin?

Blank pages after stamps?

One underwriters agreement per page? ⓘ

Include Internal Review Details

Include Attachments (PDF only)

Defined Data Supplementary Document

Questionnaire

Apply Draft Watermark

Add Page Numbers

Include Date/Time

**File Format:**

PDF

Word

**Font Style:**

Sans-serif

Serif

**Alignment:**

Align with top of Heading

Align with bottom of Heading

**Line Item Heading: ⓘ**

Font Size:

**Stamp Layout: ⓘ**

Naturalistic (Default)

Horizontal

**Proceed**

15. These options determine the file format of the exported document, either PDF or Word. Some options change or become unavailable depending on which format is used.

16. These options determine the font style to be used in the document, either Sans-serif or serif.

17. You can select whether text is aligned with the top or bottom of its contract heading title.

18. You can choose the font size of the contract headings by either clicking into the box and selecting from the resulting list, or using the up and down sizing arrows.

19. The stamp layout options are set to naturalistic by default. Keep this option if you want the stamps to appear 'real', as if they have been physically stamped onto the paper at a slightly wonky angle. Choose horizontal if you want the stamps to align perfectly on the page.

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20. Checking these boxes determines whether the selected business addresses are shown below all stamps that include that information, or whether that information is excluded.

**Please note:** these options will only be present in the export screen for contracts that include stamps.

21. When exporting a verticalised contract there are three additional options to choose from.

The first option 'Include terms as separate documents' produces a .zip file with the terms in separate PDFs. The second produces a single combined document containing all terms, and the third excludes the terms entirely and exports the contract only.

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## Export

### Attach PDF Attachments











When exporting to PDF, you may choose to attach existing PDF attachments to the front or to the end of the contract or endorsement, creating a single exported document. The order and position of the attachments may be changed by dragging a document into the required position from the list below:

Search...

#### Attach to the front of the Contract

Order	<input checked="" type="checkbox"/>	File Name	Size	Position
No attachments positioned here				

#### Attach to the end of the Contract

Order	<input checked="" type="checkbox"/>	File Name	Size	Position
1	<input checked="" type="checkbox"/>	 3.2 Adding Addresses to a Stamp 1.pdf		   
2	<input checked="" type="checkbox"/>	 Release Notes v3.2.0.pdf		   

Cancel Export

22.

Once you are satisfied with the options and have clicked proceed, if you have selected 'Include Attachments', this will take you to the 'Attach PDF attachments' page.

Here you can drag and drop documents using the six dots icon to decide which attachments will be at the front of the contract and which at the end. Once you're happy, click export.

23.

Untick the box before an attachment's name to prevent it being included in the export.