Dragging Contract Headings Between Contracts with the Insert Content Tool



2. The 'Insert Content' tool is available when the contract is editable or is able to accept verticalised terms.

To copy a contract heading and its text into the current contract, click on the blue 'Actions' button and select 'Insert Content from Contract/Template'. The source contract remains unchanged.



If the destination heading already exists and the contract is editable, you may replace the heading, insert a duplicate (to refer to or copy from when you return to contract view), or if at a verticalisable stage, insert a vertical term.



Navigate to the contract you wish to transfer content from on the dashboard, select it, click the specific contract instance to use as the source document, and then click 'Confirm'.



Shown bindable quotes / firm orders are not editable, but contract headings can still be inserted as vertical terms. If the source is an underwriter's quote, the inserted heading will show you the underwriter's identity to make assigning terms easier.



Click and drag a contract heading from the left-hand source contract to copy to the right-hand destination contract. New contract headings are inserted exactly where you drop them.

Insert Content from Contract/Template 6 1 Notio BA Aircraft '24 **BA Aircraft** '24 Draft 1 From: Me From: Me RISK DETAIL **RISK DETAILS** :: 🌭 INSLIBER INSURED Coverage and type As Per Supporting No hazarda E S TERRITOR ADDITIONAL CLAUSE ADDITIONAL C PREMIUN

Inserted headings retain all their formatting, data tags, and locking from the source contract.

Please note that inserted headings update the contract in real time, so insertions cannot be cancelled. Use the undo button to roll back insertions one at a time.



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