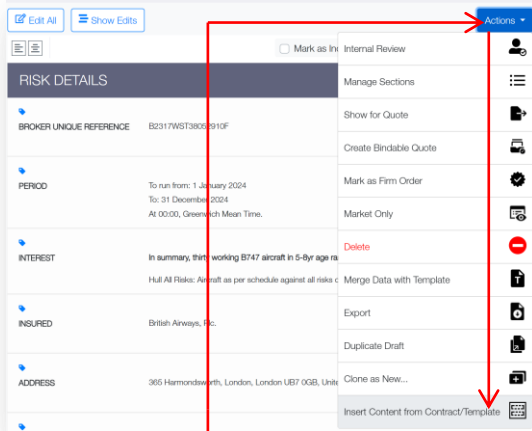


Dragging Contract Headings Between Contracts with the Insert Content Tool

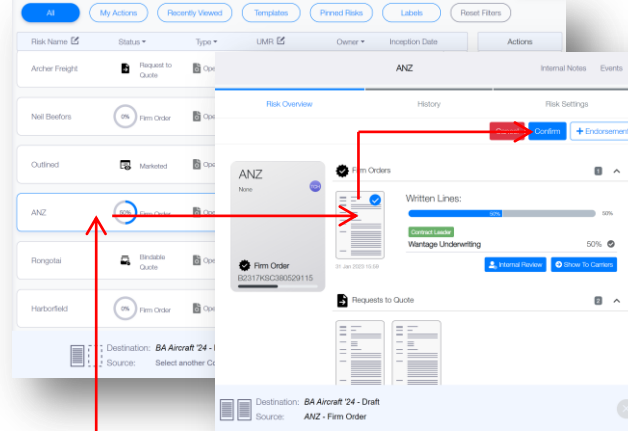
1.



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

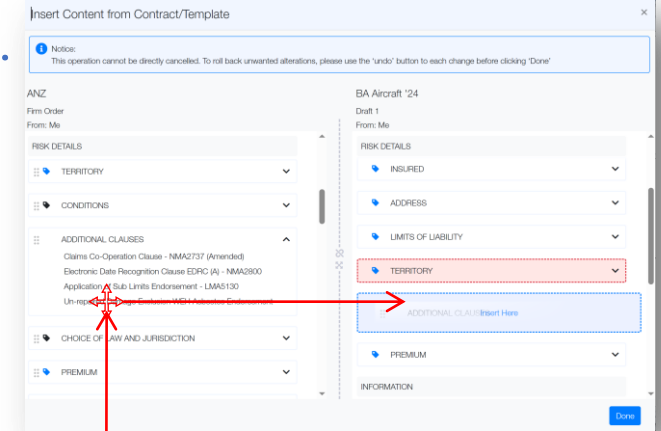
To copy a contract heading and its text into the current contract, click on the blue 'Actions' button and select 'Insert Content from Contract/Template'. The source contract remains unchanged.

2.



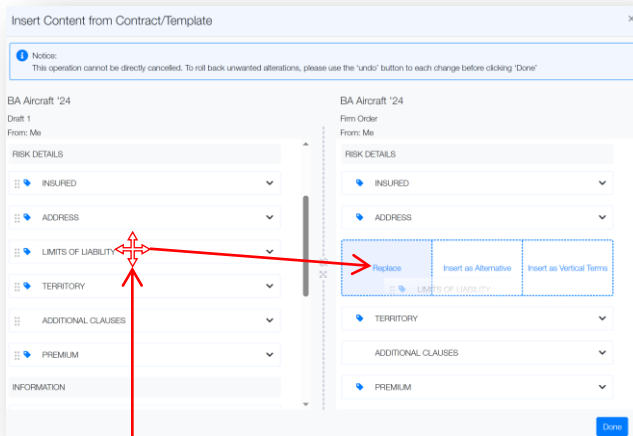
Navigate to the contract you wish to copy from on the dashboard, select it, click the specific contract instance to use as the source document, and then click 'Confirm'.

3.



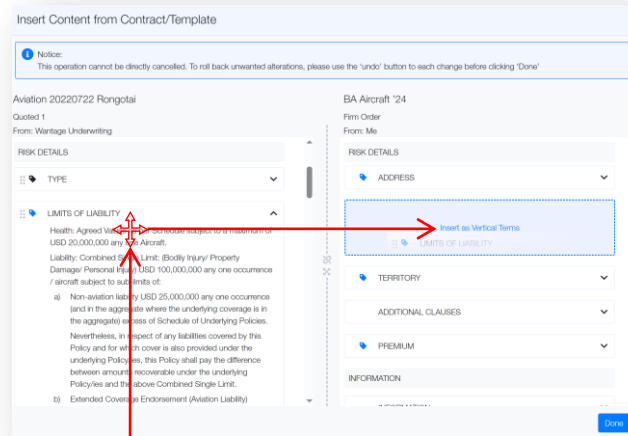
Click and drag a contract heading from the left-hand source contract to the destination contract. Copied contract headings are inserted exactly where you drop them.

4.



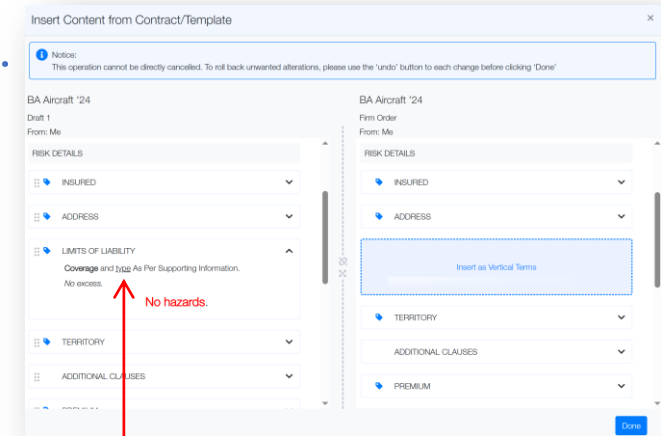
If the destination heading already exists and the contract is editable, you may replace the heading, insert a duplicate (to refer to or copy from when you return to contract view), or if at a verticalisable stage, insert a vertical term.

5.



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.

6.



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 the process cannot be cancelled. Use the red undo button next to an inserted heading to roll it back.