

# Using Outline Contracts

1.

Click 'Create New +' from the top of the Dashboard view, select 'Outline Contract', then click 'Proceed'. (If an outline template is available, click 'Use Template', select it, and skip to step 3.)

2.

For new outline contracts, specify the relevant contract details in the 'Outline Contract' boxes, clicking 'Proceed' and then 'Create'.

3.

Click on the new outline contract at the top of the dashboard, and then click the draft contract instance to open the new contract.

4.

Mouse over any contract heading and then click the blue arrow after the edit button and select 'Add attachment below' from the drop-down menu.

5.

Select the PDF contract to attach from your file system. Click 'Front' to have the slip PDF export in front of the outline contract's lines, then click 'Done'.

6.

The contract PDF is incorporated into the outline contract. It can now be shown and/or exported as normal. The PDF can be previewed or downloaded at any time, but it can only be edited or removed until the contract has been shown.