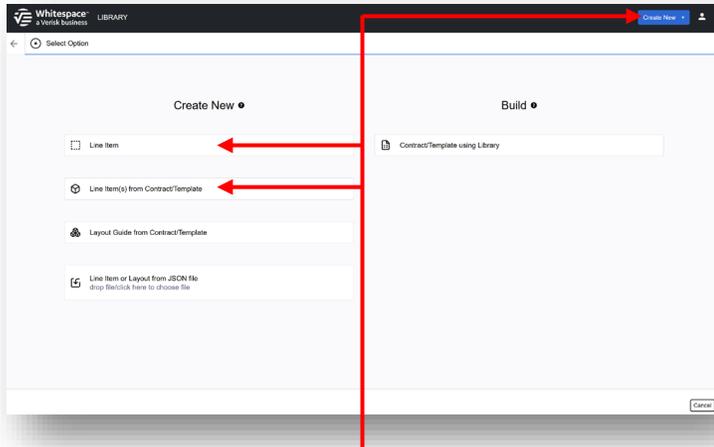


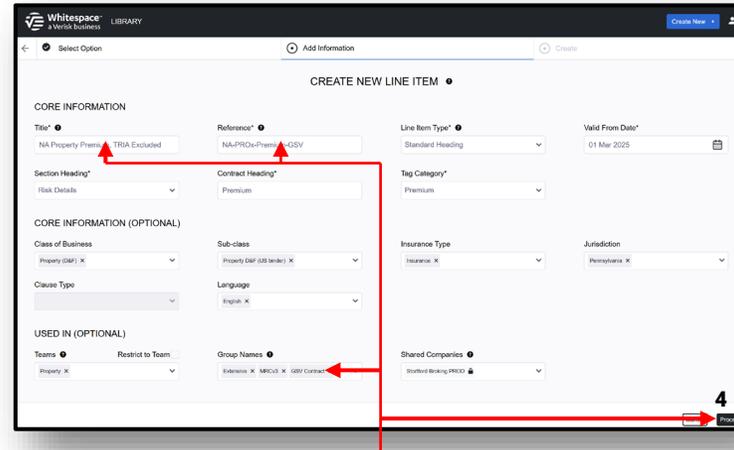
# Using the Contract Library to Create Line Items (p1)

1.



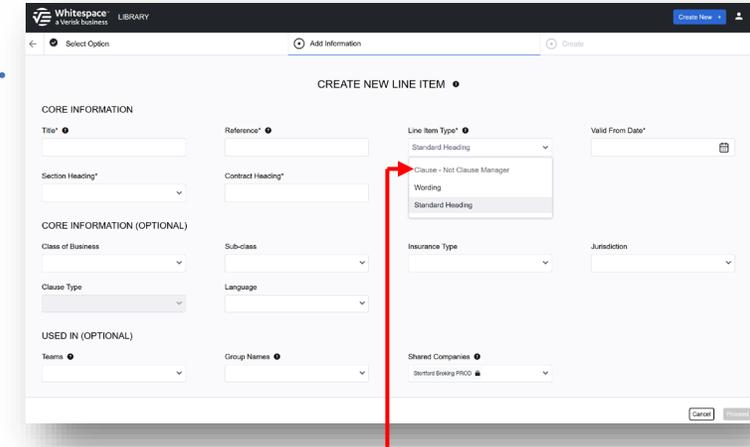
In the Library, click 'Create New +'. For a single Line Item, click 'Line Item' – see image #2 – or to import one or more Line Items from the Platform, click 'Line Item(s) from Contract/Template' – see image #6.

2.



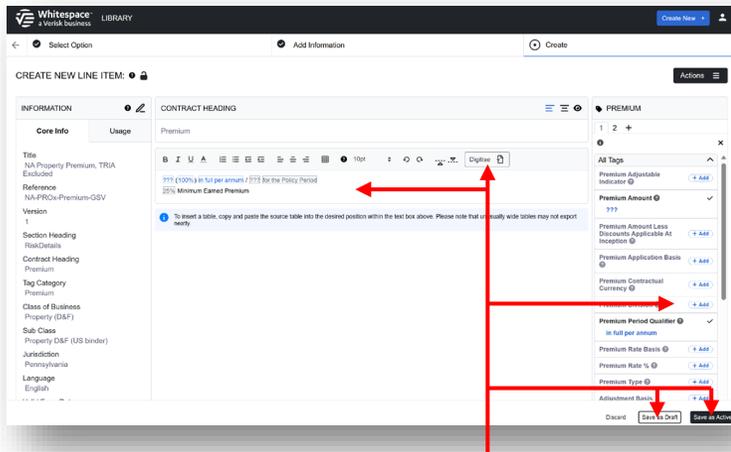
Creating a new single Line Item takes you to a detailed metadata entry page. Fill it in carefully. Title, Reference, and Group Names are particularly vital. Click 'Proceed' when done to enter Line Item view.

3.



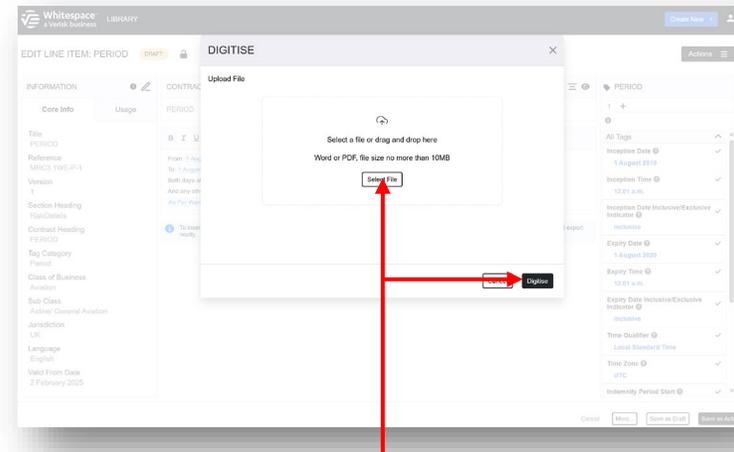
Please note that Line Items of the 'Clause' type can only be created if you have a the 'Clause Management' permission set to 'Ability to Create / Edit Clause' in the Admin portal.

4.



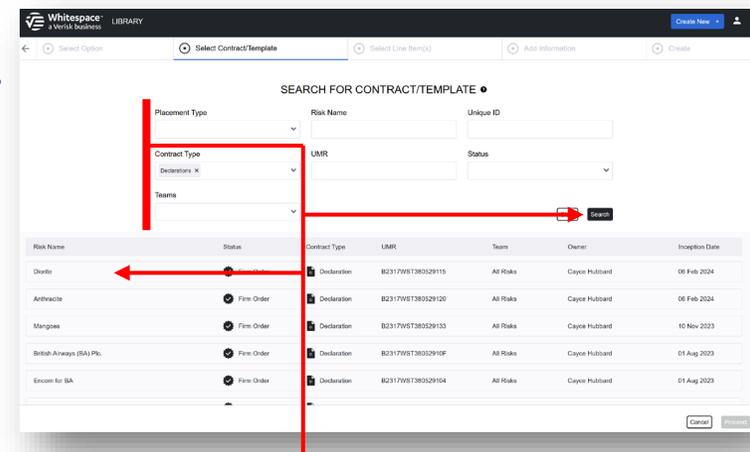
In the text editor you can type or paste into the edit box, or import ("Digitise") a document. Add data as in the Platform. Save as a draft to edit later, or active to set live.

5.



Clicking the 'Digitise' button opens an upload pane. Use it to select/drop a Word or PDF document containing the text of the Line Item, and click 'Digitise'. The document text inserts into the Line Item's text field, overwriting any existing content.

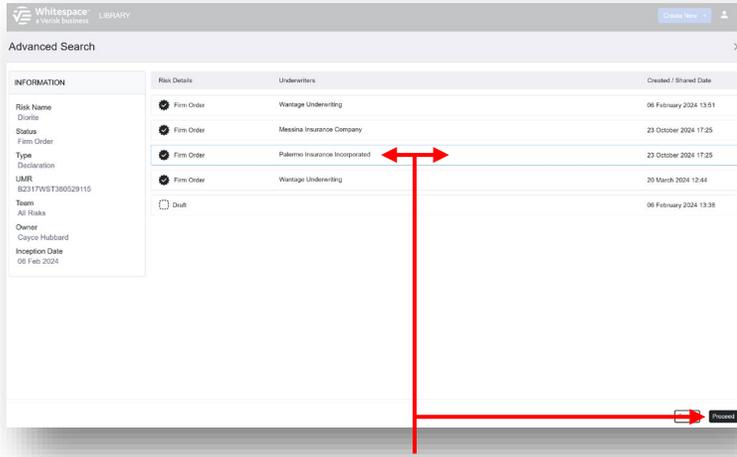
6.



Creating new Line Items from a contract/template gives you a list of all the existing contracts and templates you can see on the Platform. Enter search info and click 'Search'. Find the contract record to import Line Items from, and click on it.

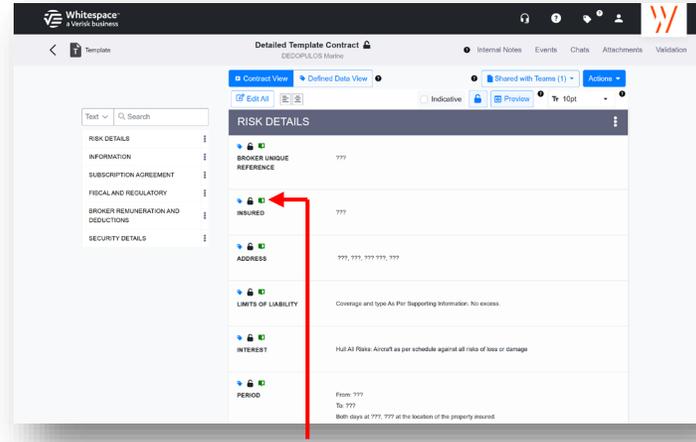
# Using the Contract Library to Create Line Items (p2)

7.



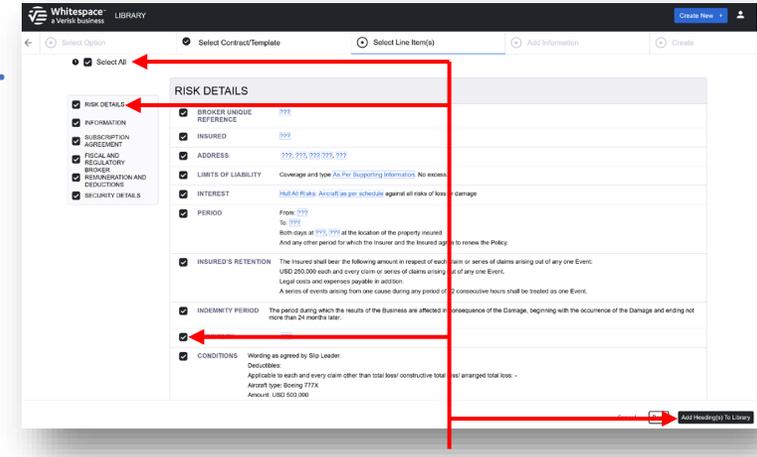
All the specific contract instances held under that contract record are listed for you to select from. Click on the appropriate contract instance and then click proceed.

8.



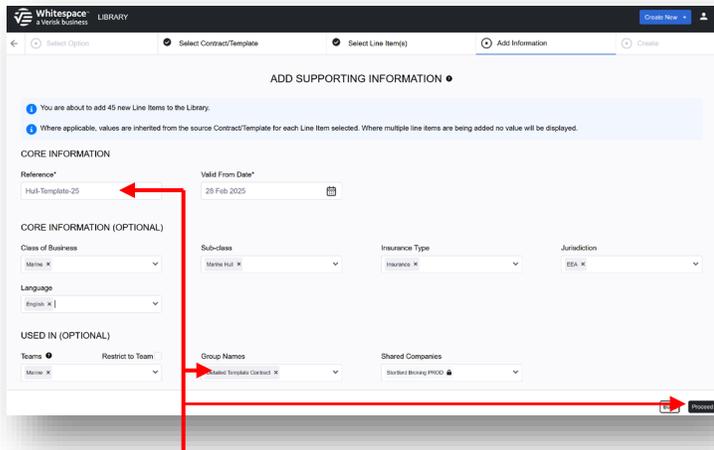
Please note that importing a template into the Library links all of its imported contract headings with their respective Library Line Items, as shown by the 'Book' icon by the heading title. This makes it easier to keep up to date. To avoid this, clone the template to a new contract and import that draft instead.

9.



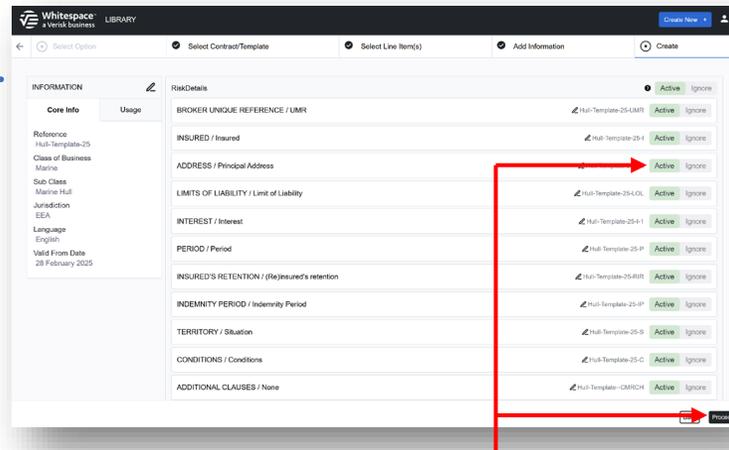
The contract or template is shown in full. By default, all its contract headings are selected. You can de/select them all, by specific contract section, or by individual contract heading. Each contract heading becomes a new Line Item. When ready, click 'Add Headings to Library'.

10.



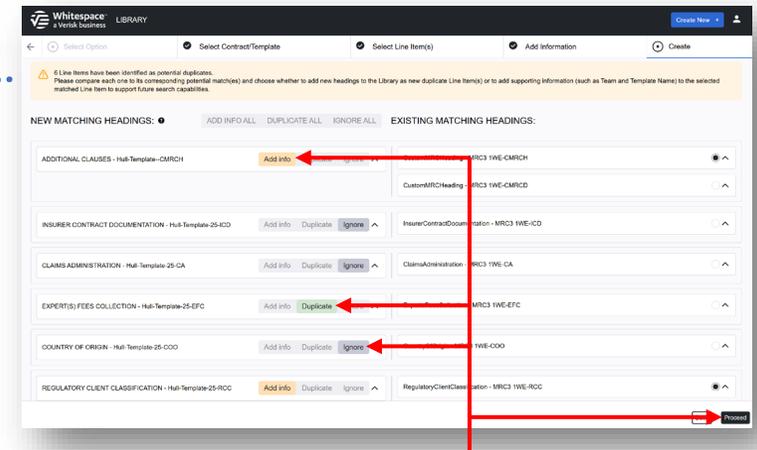
When importing from the a Platform, some data is taken from the contract/template. Fill in other fields, taking care with 'Reference' and 'Group Names', and click 'Proceed'.

11.



Line Items are titled with the import Reference and the contract heading's initials. You can click to add contract headings as new active Line Items or to ignore them. Click 'Proceed'.

12.



Any duplicated Line Items are shown. You can add new metadata to an existing Item ('Add Info'), duplicate the Item ('Duplicate'), or cancel that Item ('Ignore'). Click 'Proceed'.