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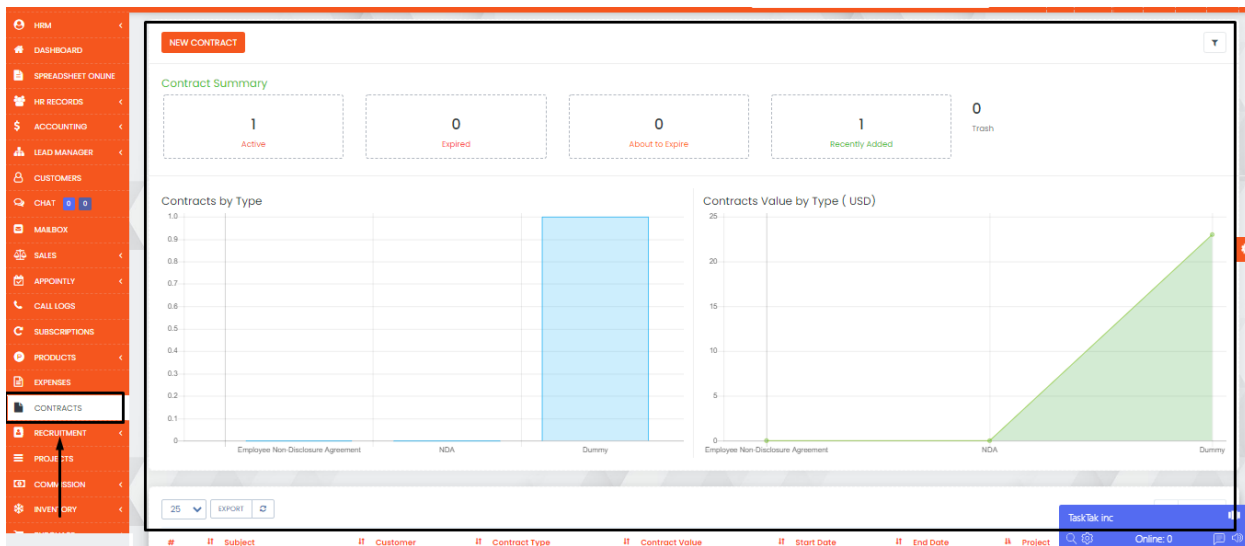
View the Contract from the Main Page **Error! Bookmark not defined.**

Delete the Contract from the Main Page 14

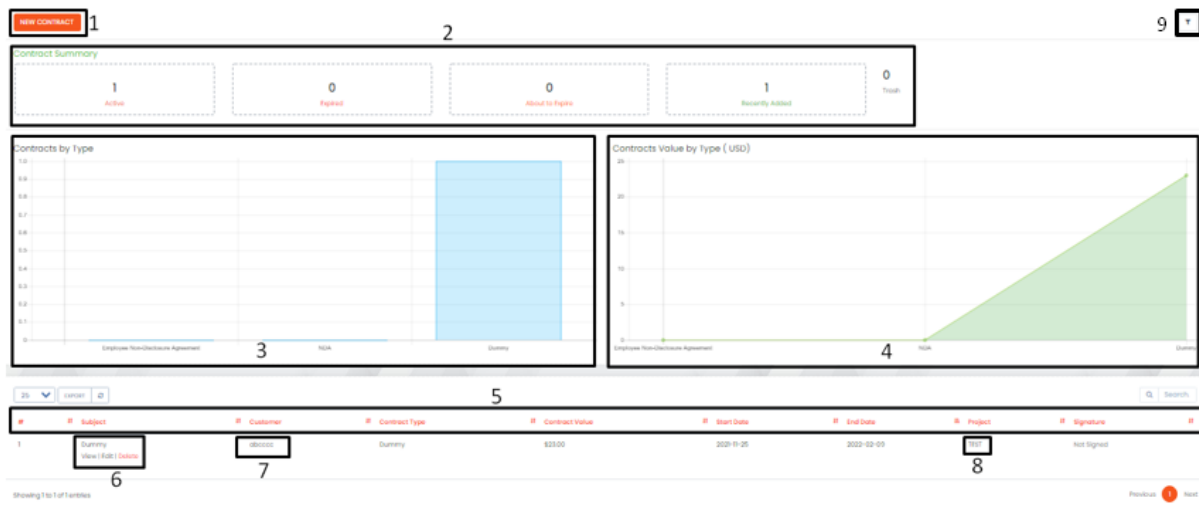
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TASK TAK USER GUIDE – CONTRACTS

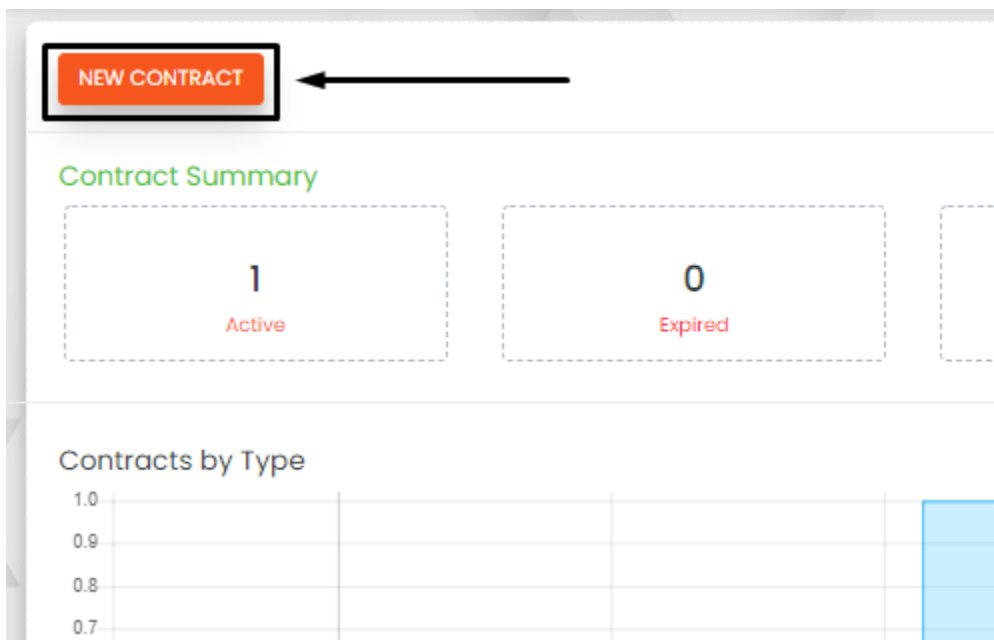


Once you click the “Contracts” option, you will be redirected to the contract's dashboard.



1. Clicking this button will allow you to create a new contract.
2. Here you will be able to view the contract's summary.
3. This chart shows the bar chart comparison of different contract types.
4. This chart shows the line chart of contracts value by type.
5. This portion lists down all types of contracts created based on Subject, customer name, Contract type, value, start and end date, project, and signature.
6. You can click the subject to view, edit and even delete the contract.
7. You can click the Customer name to view the details of the customer.
8. Here you can select the project name to view the details of the project.
9. You can filter the analytics and the lists of contracts by clicking this icon.

NEW CONTRACTS



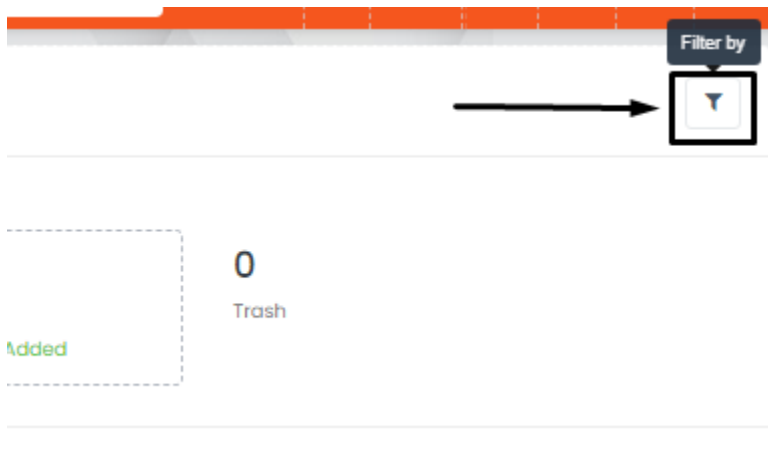
To create a new contract, you can click the “New Contract” button

The screenshot shows the 'New Contract' form. The form has several fields: 'Trash' and 'Hide from customer' (both unchecked), 'Customer' (a dropdown menu), 'Subject' (a text input), 'Contract Value' (a text input with a dollar sign), 'Contract type' (a dropdown menu with 'Non selected' and a plus sign), 'Start Date' (a date input with '2021-11-16' and a calendar icon), 'End Date' (a date input with a calendar icon), and 'Contract description' (a large text area). A 'SAVE' button is at the bottom right.

1. To delete the current contract or put the contract in trash, you can click the trash option. You can also hide it from the customer by clicking the “Hide from customer” option. If this button is unchecked your customer will be able to access the contract from the customer portal.
2. Select or type the customer you would like associated to this contract.
3. Here you need to write the subject for the contract.
4. You can optionally enter the contract value here.
5. Select the type of contract that is already in your system or add a new contract type by clicking the plus sign.
6. Specify the start and end date of the contract. If there is no end date to the contract leave the end date blank.

7. You can write a contract description here.
8. Finally click the save button to add a new contract.

FILTER BY



To filter the contract details in the dashboard accordingly, you can click this icon.



1. When you click "Exclude Trashed Contracts" this will select or deselect the option will allow or disallow the view contract details including or excluding the "trash" contracts.
2. Selecting this option will allow you to view all details.
3. Selecting this option will allow you to view all expired contracts.
4. Selecting this option will allow you to view all contracts without end date.
5. Selecting this option will allow you to view all trash contracts only.
6. Selecting this option will allow you to view all contracts created in that specific month.

7. This section will show the current contracts you have available in your system. You can select or deselect these as desired.

You can filter based on multiple selected types and not just one specific filtered value like month or year only.

CLICK THE SUBJECT/EDIT OPTION



To view and modify the details of a specific contract, you can either click on the subject name or “Edit” option.

Filters:

- Customer: abccc
- Project: TEST
- Subject: Dummy
- Contract Value: 23.00
- Contract type: Main Agreement
- Start Date: 2021-11-16
- End Date: 2022-01-31
- Contract description: Main agreement used for customers.

Contract Details:

Dummy View Contract

Contract Attachments Comments 2 Contract Renewal History 2 Tasks Notes 1 Templates

Available merge fields

{contact_firstname}dummy dummy dummy
{contact_firstname}

TaskTak inc Online: 0 SAVE

Once you click the subject/contract name or the “Edit” option, you will be redirected to this new page.

☐ Trash
 ☐ Hide from customer

* Customer

Project

• Subject

Contract Value
 \$

Contract type
 +

* Start Date

End Date

Contract description

Main Agreement used for customers

Here you can see the existing details of the contract. If you want, you can edit the details and click the "Save" button in the right-hand corner.

Main Agreement with Tuslr

[View Contract](#)

[Contract](#)
[Attachments](#)
[Comments](#)
[Contract Renewal History](#)
[Tasks](#)
[Notes](#)
[Templates](#)

[MORE](#)

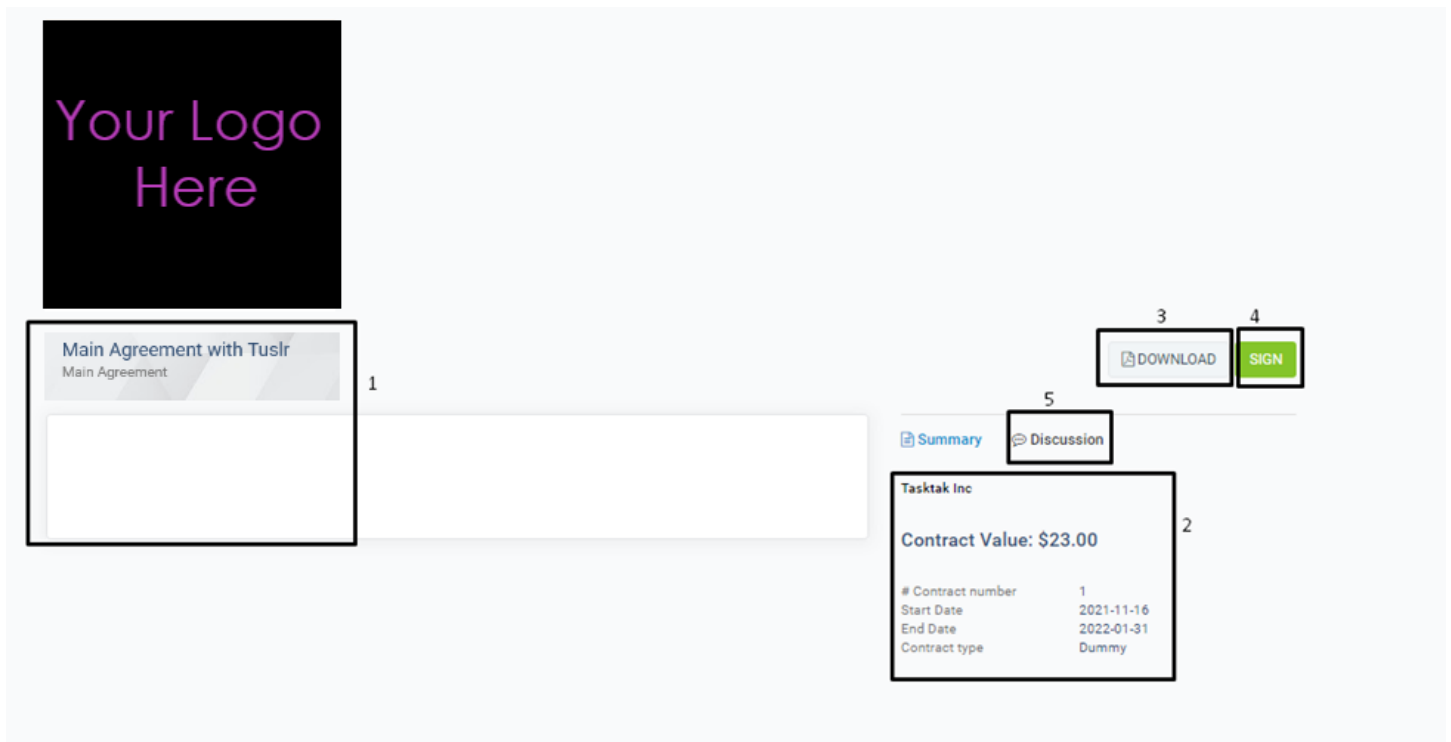
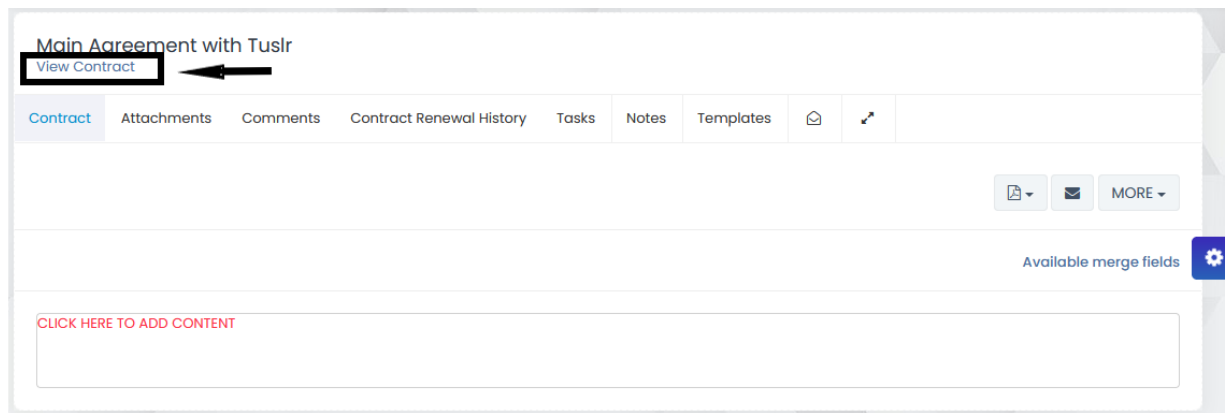
[Available merge fields](#)

[CLICK HERE TO ADD CONTENT](#)

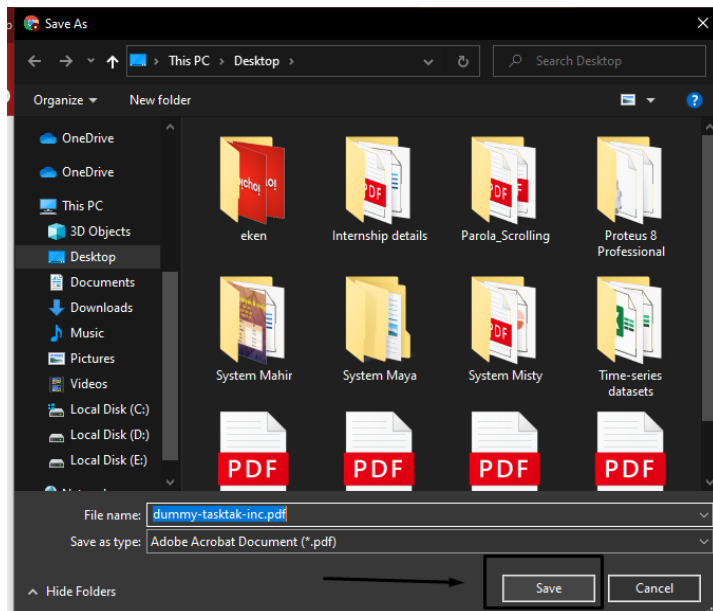
This portion allows you to do some additional tasks for this contract like adding comments, notes and many more that are discussed down below.

VIEW CONTRACT

To preview the contract, you can click here.



1. These are the descriptions of the contract.
2. These are the some more details related to the contract
3. You can download the contract by clicking here.



4. To sign the contract, click here. Then provide the information given below and click the “Sign” button

Signature & Confirmation Of Identity

First Name

Last Name

Email

Signature

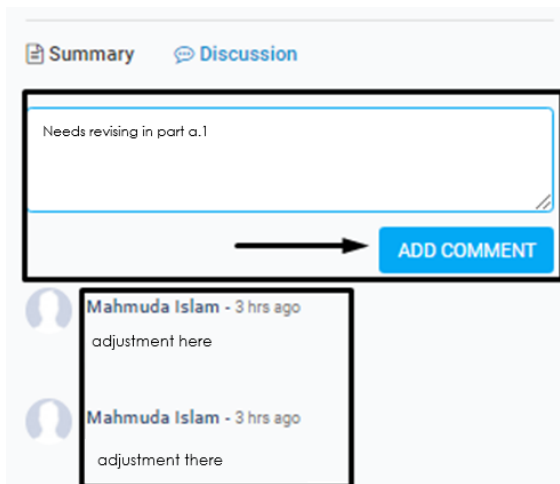
CLEAR UNDO

By clicking on "Sign", I consent to be legally bound by this electronic representation of my signature.

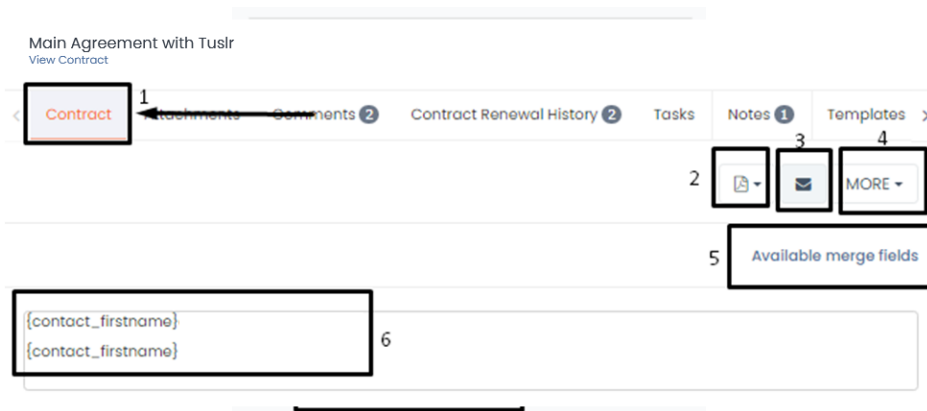
CANCELLED

SIGN

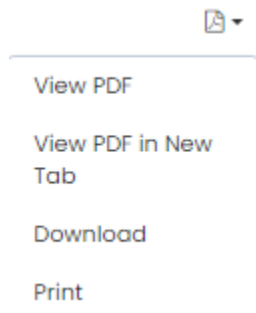
5. To view comments or add comment, click the “Discussions” option.



CONTRACT



1. To view or modify details related to contract, you need to click here. The page is already opened in the above picture.
2. To download or print the contract, you can click this icon.



3. To email the contract, click here.

Send contract to email

Send to
you.remail@yourdomain.com

CC

☒ Attach PDF

Preview Email Template

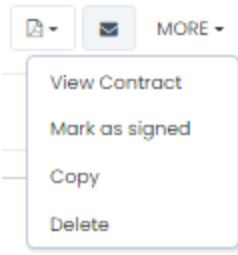
File Edit View Insert Format Tools Table

Verdana 12pt A B I

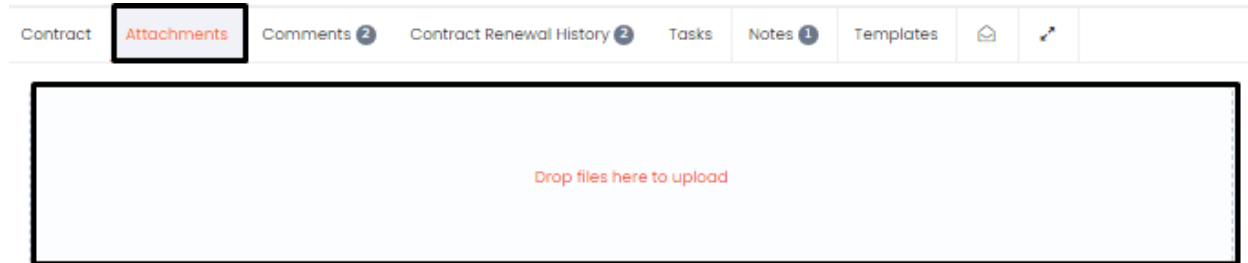
Hi {contact_firstname} {contact_lastname}
Please find the {contract_subject} attached.
Description: {contract_description}
Looking forward to hear from you.
Kind Regards,
{email_signature}

CLOSE SEND THE NOTIFICATION

4. To view, copy or delete the contract, click here.



ATTACHMENTS



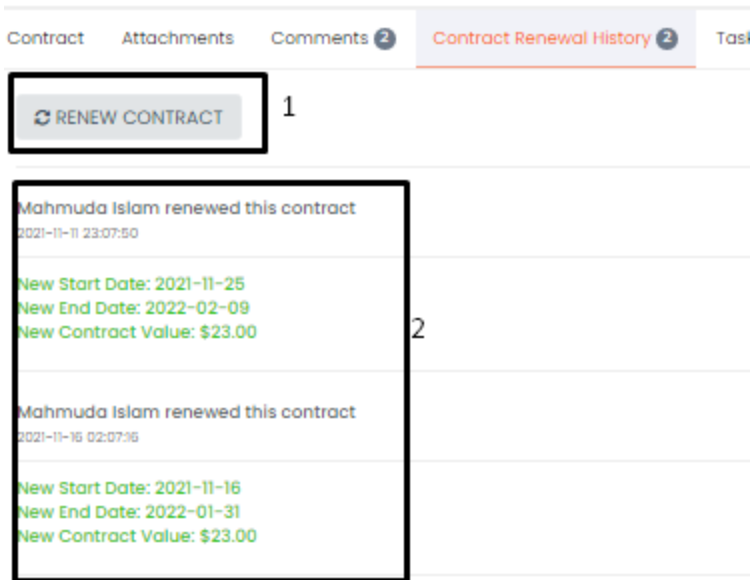
To attach any attachments, you can drop files here.

COMMENTS



1. You can only re-edit the comments or delete the comments you have added before.
2. You preview the list of all comments here.
3. You can add another comment and click the “Add comment” button.

CONTRACT RENEWAL HISTORY



After clicking the contact renewal history, you will be redirected to that page.

1. To renew the contract, you can click here. Then set the date and finally click the "Save" button.

Renew Contract

Start Date
2021-11-16

End Date
2022-01-31

Contract Value
23.00

CLOSE SAVE

2. Here you will be able to see the renewal history and its details.

TASKS

Main Agreement with Tuslr

View Contract

Toggle full view

Contract Attachments Comments 2 Contract Renewal History 2 **Tasks** Notes 1 Templates

NEW TASK 1

25 EXPORT

2

3

#	Name	Status	Start Date	Due Date	Assigned to	Tags	Priority
1115	Testing Task Start Timer Edit Delete	In Progress	2021-11-11	2021-11-17			Medium

Showing 1 to 1 of 1 entries

Previous 1 Next

After clicking the tasks, you will be redirected to the tasks page.



1. To add a new task, click here. Then provide the related information and click the "Save" button.

Add new ×

☐ Public ☒ Billable [Attach Files](#)

Subject

Hourly Rate

Start Date  **Due Date** 

Priority **Repeat every**

Related To **Contract**

Assignees **Followers**

Tags

Task Description

CLOSE SAVE

2. These are the fields explaining the details of the task.

3. Clicking here, you can start the timer, re-edit the task or even delete it if necessary.

NOTES

The screenshot shows the 'Main Agreement with Tuslr' page with the 'Notes' tab selected. A large text area for writing a note is labeled '1' and contains an 'ADD NOTE' button. Below it, a list of notes is shown, with one note labeled '2' containing the text '2021-11-16 02:07:03 Mahmuda Islam Test Note'. To the right of the list, a small control box labeled '3' contains edit and delete icons.

After clicking the notes, you will be redirected to the page above.

1. Here you can write a note and click the "Add note" button.
2. You will be able to preview all previous notes submitted before.
3. You re-edit or delete the notes if necessary.

TEMPLATES

The screenshot shows the 'Main Agreement with Tuslr' page with the 'Templates' tab selected. A large text area for writing a template is labeled '1' and contains an 'ADD TEMPLATE' button. Below it, a text area labeled '2' contains the word 'Dummy' and an 'INSERT' button, along with edit and delete icons.

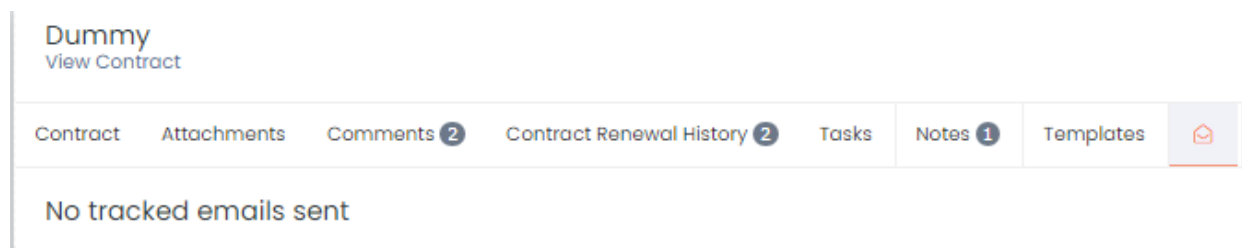
After clicking the templates, you will be redirected to the page above.

1. You can add a new template by clicking here. Then provide the content details and click the "Save" button.

The screenshot shows the 'Add Template' modal form. It has a title bar with a close button. Below the title bar, there is a 'Name' field. Underneath is a 'Content' section with a rich text editor. The editor has a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. The toolbar includes options for font face (Verdana), font size (12pt), bold, italic, text color, background color, bulleted list, numbered list, link, unlink, and undo. At the bottom right of the modal, there are 'CLOSE' and 'SAVE' buttons.

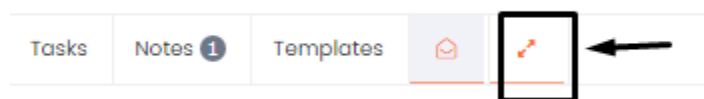
2. Here you can insert the template in the main contract page, reedit the template or even delete it if necessary.

EMAILS TRACKING



To view the list of tracked emails, click here.

TOGGLE FULL VIEW

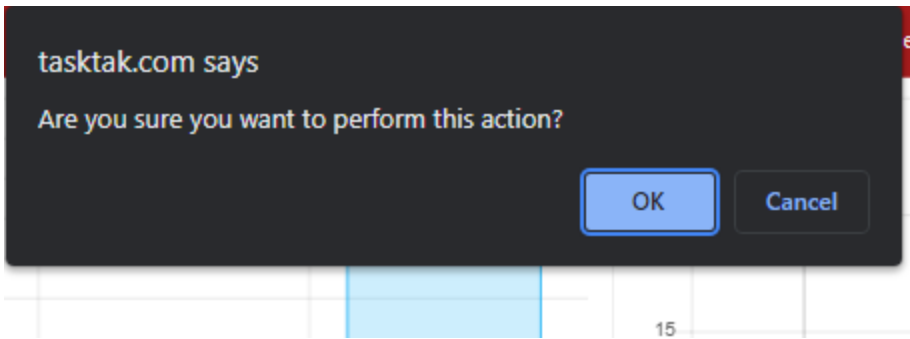


To view the editable form of the contract, then click here. If its already there, then clicking it will hide the form.

DELETE THE CONTRACT FROM THE MAIN PAGE

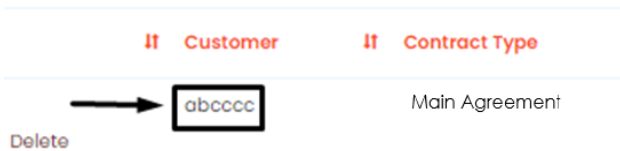


To delete the contract, click here.



A confirmation message will pop up. If you agree to delete the contract, click "OK" or click "Cancel"

CLICK THE CUSTOMER'S NAME



To view or modify the details of the customer, click here.

A screenshot of a "Customer Details" form. At the top, there are four tabs: "Profile 1", "2", "3", and "4". Below these are four sub-tabs: "Customer Details" (highlighted with a red box and labeled "1"), "Billing & Shipping" (labeled "2"), "Customer Admins" (labeled "3"), and "Purchase Order" (labeled "4"). The main form area is labeled "5" and contains a checkbox "Show primary contact full name on Invoices, Estimates, Payments, Credit Notes". Below this, the form is split into two columns. The left column, labeled "Company", contains fields for "Company" (with value "abcccc"), "Phone" (with value "123"), "Website" (with value "GOOGLE.COM"), "Groups" (with a dropdown menu showing "Non selected"), "Currency" (with a dropdown menu showing "System Default"), and "Default Language" (with a dropdown menu showing "System Default"). The right column, labeled "Address", contains fields for "Address" (with value "KARACHI PAKISTAN"), "City" (with value "karachi"), "State" (with value "sindh"), "Zip Code" (with value "74900"), and "Country" (with a dropdown menu showing "Pakistan"). At the bottom right of the form, there is a red "SAVE" button labeled "6". At the bottom of the page, there is a blue footer bar with the text "TaskTak inc" and "Online 1".

You will be redirected to this page up here.

1. Clicking here, you will be able to view and edit the personal details of the customer.
2. Clicking "Billing and shipping" will allow you to view or modify details related to payments.

Customer Details **Billing & Shipping** Customer Admins Purchase Order

Billing Address

Same as Customer Info

Street

KARACHI PAKISTAN

City

karachi

State

sindh

Zip Code

74900

Country

Pakistan

Shipping Address

Copy Billing Address

Street

City

State

Zip Code

Country

Non selected


- Clicking the customer admins allows you to assign an admin from the clients company and details of other contracts are provided there.

Customer Details Billing & Shipping **Customer Admins** Purchase Order

ASSIGN ADMIN

25 EXPORT Search Search

Staff Member	Date Assigned	Options
No entries found		




- Clicking the "Purchase order" option, allows you to view details related to previous purchases.

Customer Details Billing & Shipping Customer Admins **Purchase Order**

25 EXPORT Search Search

Purchase order	Total	Order date	Payment status
No entries found			

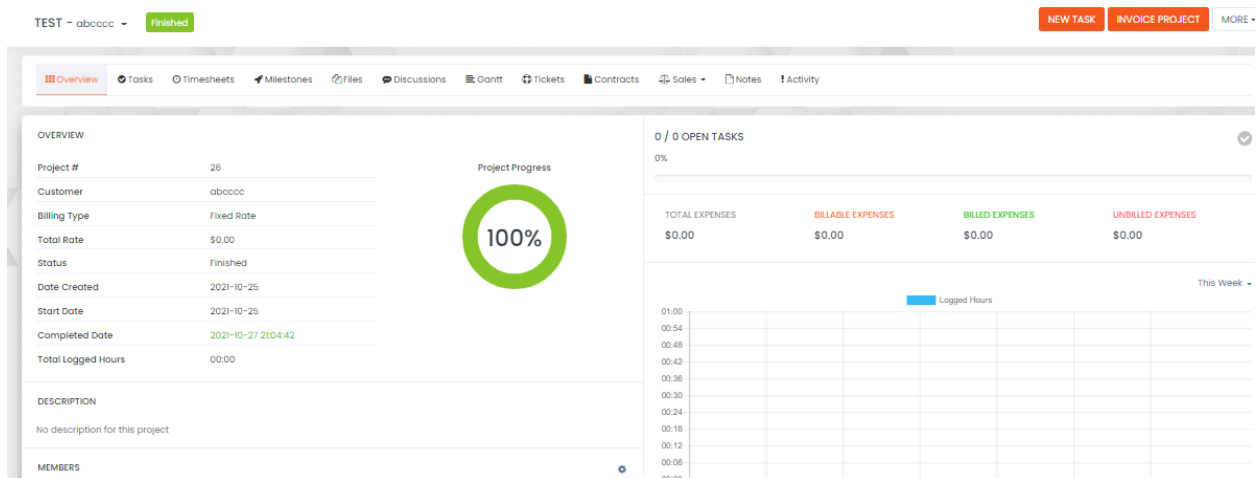


- Here are the details information related to the client's company.
- Finally, after editing all details, you can click the "Save" button.

CLICK THE PROJECT'S NAME

ite	Project	Signatu
31-31	TEST	Not Sign

To view the project details, click here.



Here you will be able to view the analytics and detailed information regarding the project of the selected contract.