Once you click the "Contracts" option, you will be redirected to the contract's dashboard.
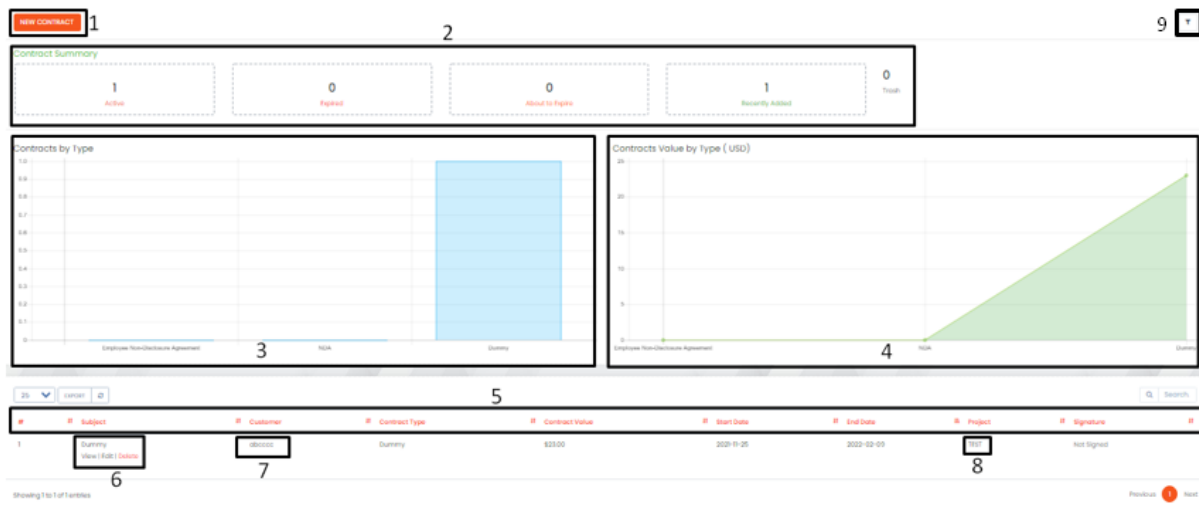
1. Clicking this button will allow you to create a new contract.
2. Here you will be able to view the contract's summary.
3. This chart shows the bar chart comparison of different contract types.
4. This chart shows the line chart of contracts value by type.
5. This portion lists down all types of contracts 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.
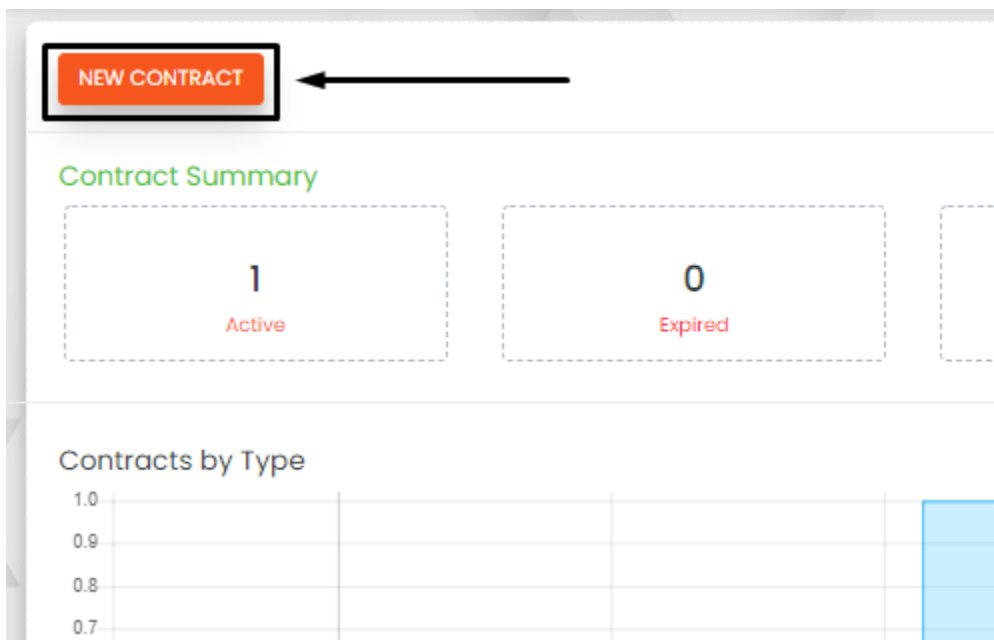
To create a new contract, you can click the "New Contract" button

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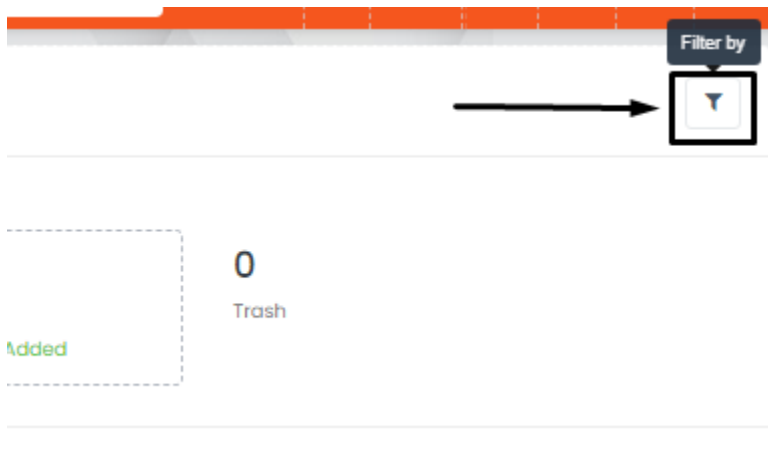
To filter the contract details in the dashboard accordingly, you can click this icon.

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.

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

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.

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.

Main Agreement with Tuslr
View Contract

| Contract | Attachments | Comments | Contract Renewal History | Tasks | Notes | Templates |

CLICK HERE TO ADD CONTENT

Available merge fields

Your Logo Here

Main Agreement with Tuslr
Main Agreement

1

3   4
DOWNLOAD   SIGN

5
Summary   Discussion

Tasktak Inc

Contract Value: $23.00

# Contract number	1
Start Date	2021-11-16
End Date	2022-01-31
Contract type	Dummy

2

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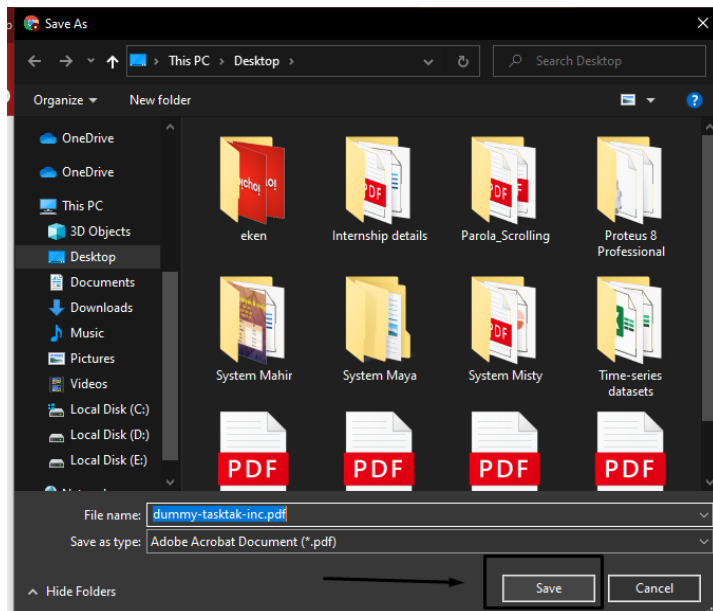
4. To sign the contract, click here. Then provide the information given below and click the "Sign" button

5. To view comments or add comment, click the "Discussions" option.
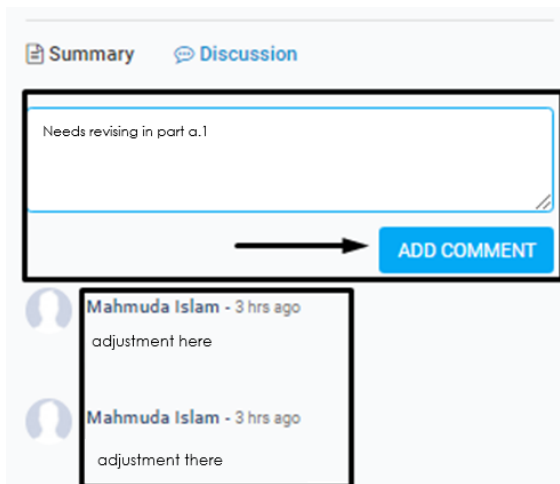
Main Agreement with Tuslr
View Contract
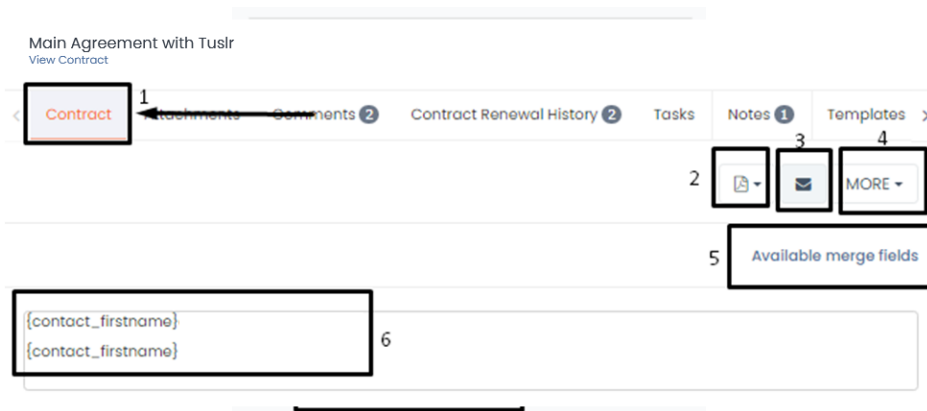
1. To view or modify details related to contract, you need to click here. The page is already opened in the above picture.

2. To download or print the contract, you can click this icon.
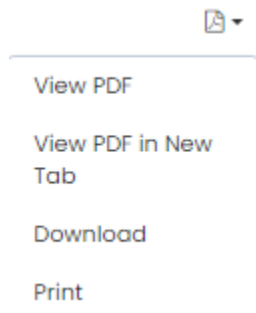
3. To email the contract, click here.

4. To view, copy or delete the contract, click here.
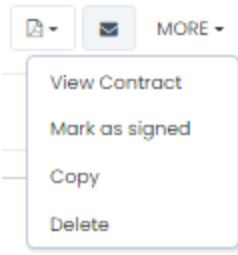
ATTACHMENTS
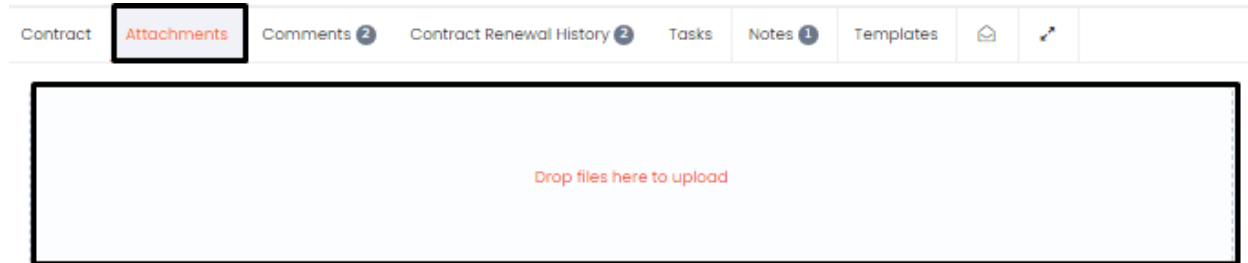
To attach any attachments, you can drop files here.

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

Contract   Attachments   Comments ❷   Contract Renewal History ❷   Tas

⟳ RENEW CONTRACT   1

Mahmuda Islam renewed this contract
2021-11-11 23:07:50

New Start Date: 2021-11-25
New End Date: 2022-02-09
New Contract Value: $23.00

2

Mahmuda Islam renewed this contract
2021-11-16 02:07:16

New Start Date: 2021-11-16
New End Date: 2022-01-31
New Contract Value: $23.00
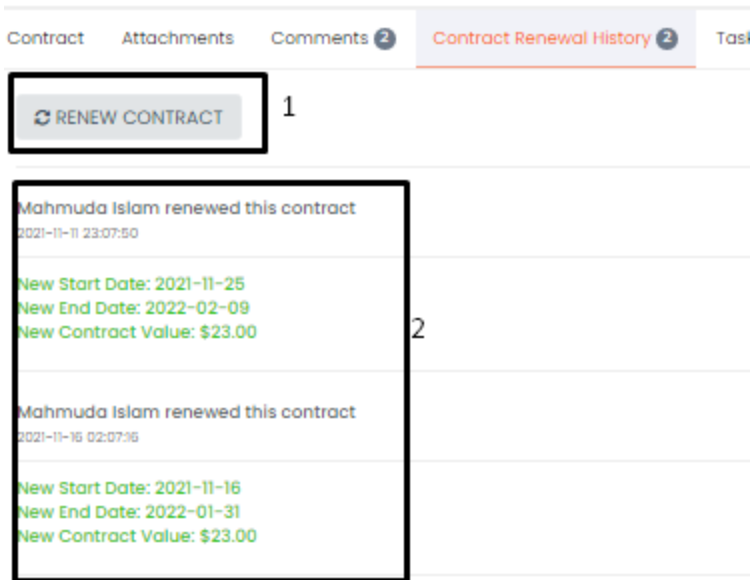
After clicking the contact renewal history, you will be redirected to that page.

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

#	⇅ Name	⇅ Status	⇅ Start Date	⇅ Due Date	⇅ Assigned to	⇅ Tags	⇅ Priority	⇅
1115	Testing Task Start Timer | Edit | Delete 3	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

Testing Task

Hourly Rate

10

• Start Date   Due Date

2021-11-26 📅   📅

Priority   Repeat every

Medium ▾   Non selected ▾

Related To   Contract

Contract ▾   Main Agreement with Tuslr ▾

Assignees   Followers

Tyrese Hill ▾   Non selected ▾

🏷 Tags

Tag

Task Description

Add 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

Main Agreement with Tuslr
View Contract

| Contract | Attachments | Comments ② | Contract Renewal History ② | Tasks | Notes ① | Templates | ✉ | ↗ |

1

ADD NOTE

2021-11-16 02:07:03
Mahmuda Islam
Test Note 2

3 ☑ ✖

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

| Contract | Attachments | Comments ② | Contract Renewal History ② | Tasks | Notes ① | Templates | ✉ | ↗ |

ADD TEMPLATE 1

2

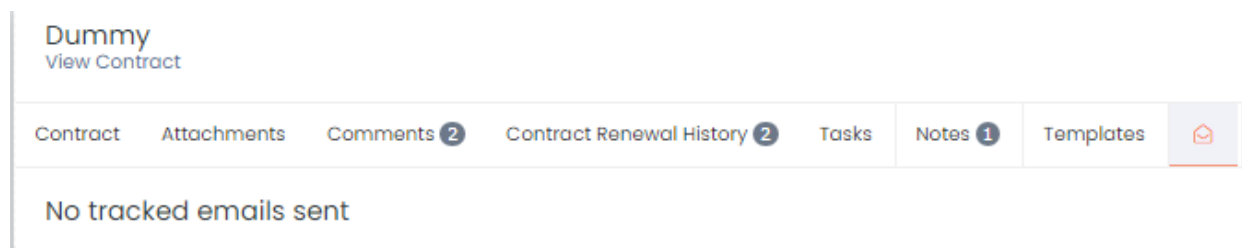Dummy   INSERT ☑ ✖

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.

Add Template   ✕

* Name

Content

File ▾ Edit ▾ View ▾ Insert ▾ Format ▾ Tools ▾ Table ▾

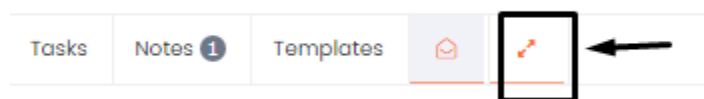Verdana ▾ 12pt ▾ A ▾ A ▾ B I ≡ ≡ ≡ ≡ 🖼 🔗 ☰ ▾ ☰ ▾ ↺

CLOSE SAVE

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

EMAILS TRACKING

Dummy
View Contract

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

No tracked emails sent

To view the list of tracked emails, click here.

TOGGLE FULL VIEW
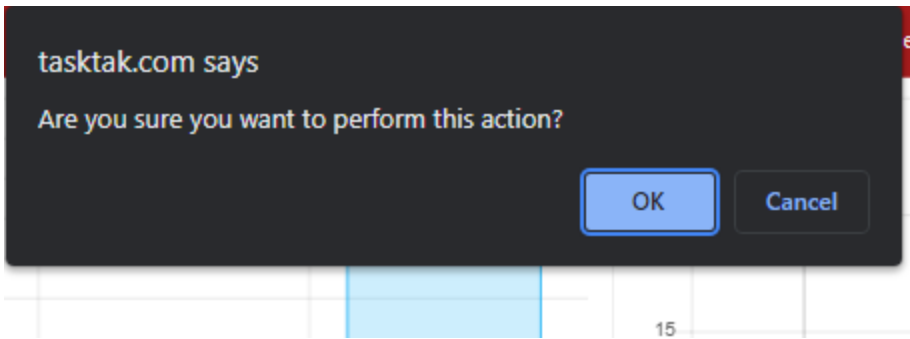
| Tasks | Notes 1 | Templates | ✉ | ⤢ | ← |

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

⇅ **Subject**   ⇅ **Custor**

Main Agreement   abcccc

View | Edit | Delete

To delete the contract, click here.

tasktak.com says

Are you sure you want to perform this action?

OK   Cancel

15

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

CLICK THE CUSTOMER'S NAME

⇅ **Customer**   ⇅ **Contract Type**

abcccc   Main Agreement

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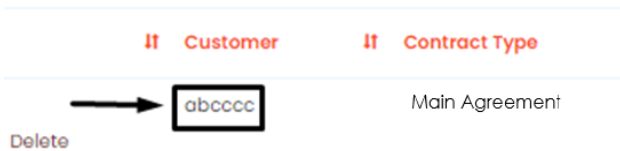
To view or modify the details of the customer, click here.

Profile 1   2   3   4

Customer Details Billing & Shipping Customer Admins Purchase Order   5

☐ Show primary contact full name on Invoices, Estimates, Payments, Credit Notes

* Company   Address

abcccc   KARACHI PAKISTAN

Phone

123   City

Website   karachi

GOOGLE.COM   ⊘   State

Groups   sindh

Non selected   ▾   +   Zip Code

Currency   74900

System Default   ▾   Country

Default Language   Pakistan   ▾

System Default   ▾

6

TaskTak inc   ▯▮

🔍 ⚙   Online: 1   ▱ ◁   SAVE

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.

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

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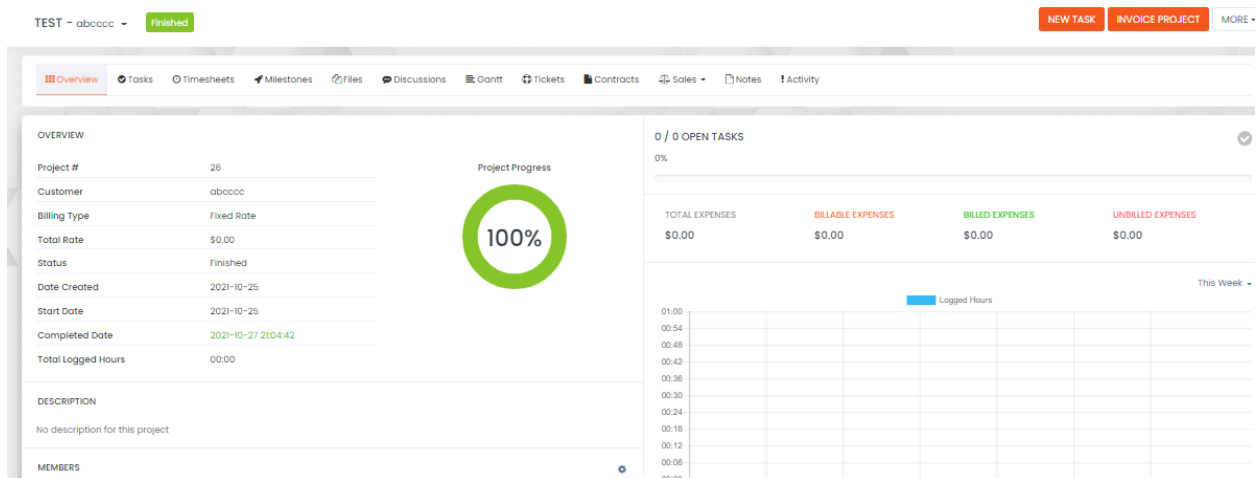

5. Here are the details information related to the client's company.
6. Finally, after editing all details, you can click the "Save" button.

CLICK THE PROJECT'S NAME

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.