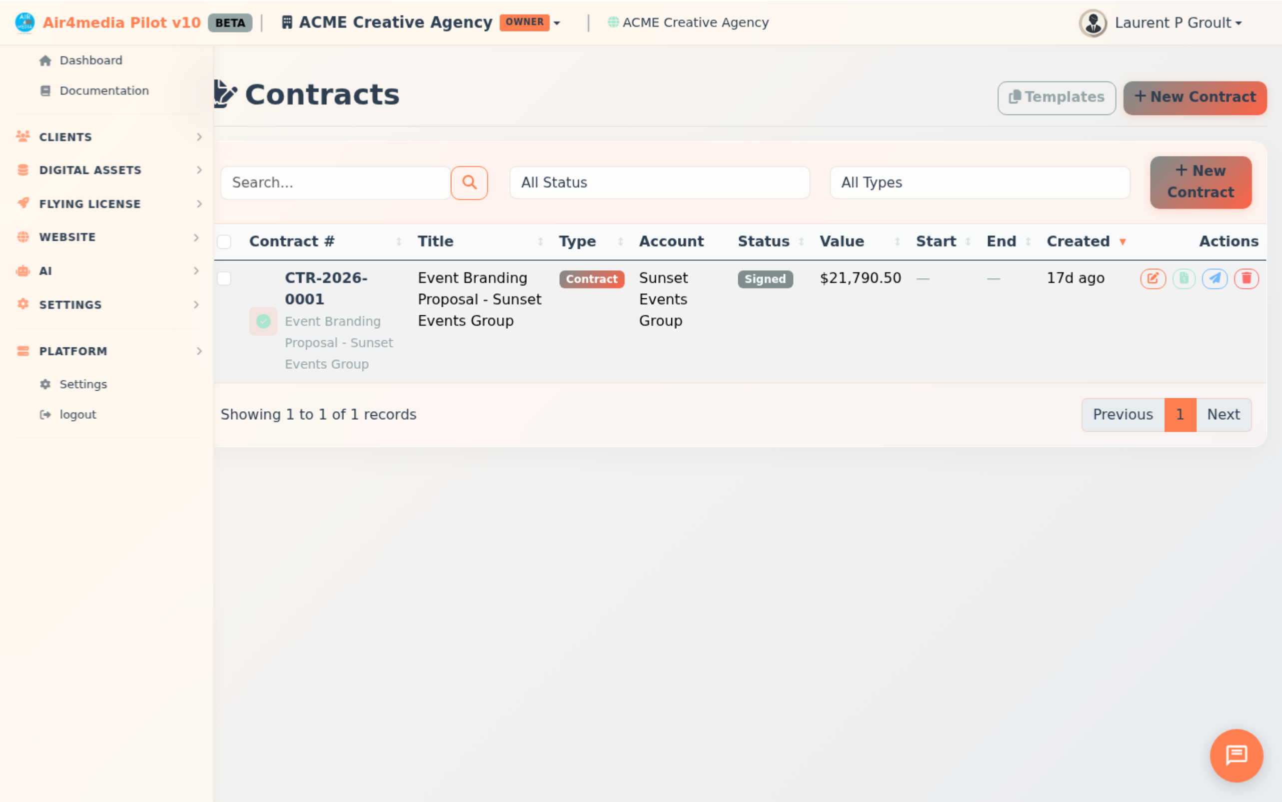

Contracts

Create, send, and sign business contracts — all in one place. Manage the full contract lifecycle from draft to completion, with built-in digital signatures, PDF export, and invoice generation.

Key Features

- **Contract Editor**: Full-screen three-panel editor — details on the left, HTML content in the center, signatures on the right
- **Contract Types**: Contracts, Questionnaires, Subcontracts, Lead Forms, and Proposals — filter by type to find what you need
- **Templates**: Save and reuse contract templates (General, NDA, Service Agreement, SOW, Rental, Event) with dynamic variables that auto-fill with contract details
- **Digital Signatures**: Both you and your client sign directly in the browser using a signature pad — works with mouse or touchscreen on any device
- **Status Tracking**: Follow every contract through Draft → Sent → Signed → Active → Completed, or mark it Void or Expired
- **Amendment Workflow**: Amend a signed contract (with a reason), which clears signatures and requires both parties to re-sign
- **PDF Download**: Download a formatted PDF of any contract, including captured signatures

- **Invoice Generation**: Convert a signed or active contract into an invoice with one click
- **Automations**: When a contract is signed, connected automations fire — including moving the linked project to a Won stage and upgrading the account from Prospect to Client

How to Use

Create a Contract

1. Click **New Contract** in the top bar
2. Enter a title and select the account — a contract number is assigned automatically (e.g., CTR-2026-0001)
3. Optionally link a project and contact
4. Set start and end dates and a total value
5. Add internal notes (visible only to you)
6. Write the contract body in HTML, or pick a template to auto-fill the content
7. Click **Save Contract** to save as a draft

Use Templates

1. Click **Templates** to manage your saved templates
2. Create a template using HTML and placeholder variables: `{{account_name}}`, `{{contact_name}}`, `{{contract_number}}`, `{{contract_title}}`, `{{total_value}}`, `{{start_date}}`, `{{end_date}}`, `{{today}}`, `{{year}}`
3. When editing a contract, select a template from the dropdown and click **Apply Template** to replace the contract body

Send to a Client

1. Open a draft contract and review the content
2. Click **Send to Client** in the footer — the contract saves and the status changes to **Sent**
3. The client receives a link to view and sign the contract on any device

Sign a Contract

1. Open a contract and go to the **Signatures** panel on the right
2. Draw your signature on the Provider pad, enter your printed name, and click **Sign as Provider**
3. To record the client's signature, draw it on the Client pad and click **Record Client Signature**

4. Once both parties have signed, the status updates to **Signed** automatically

Amend a Signed Contract

1. Open a signed contract and click **Amend** in the footer
2. Enter the reason for the amendment
3. The contract returns to Draft, all signatures are cleared, and both parties must sign again

Generate an Invoice

From the list, click **Generate Invoice** in the row actions of a signed or active contract — an invoice is created and linked to the contract.

Download a PDF

Click **PDF** in the contract editor header, or use the **Download PDF** row action in the list.

Void a Contract

Open any sent, signed, or active contract and click **Void** in the footer.

Tips

- Use the **Preview** toggle in the editor to see the formatted contract before sending; existing contracts open in Preview mode by default
- Filter the list by **Status** or **Type** to quickly find specific contracts
- Search by contract number, title, or account name; click any column header to sort
- Select multiple contracts with the checkboxes to delete them in bulk
- Send a contract directly from the list using the row **Send** action — no need to open the editor
- Contracts created from a project page automatically pre-fill the account and project fields
- The signature pad works on mobile and tablet — each signature records the date and time for your records
- When both parties sign, any connected automations trigger automatically
- Default system templates cannot be deleted — only custom templates you create can be removed