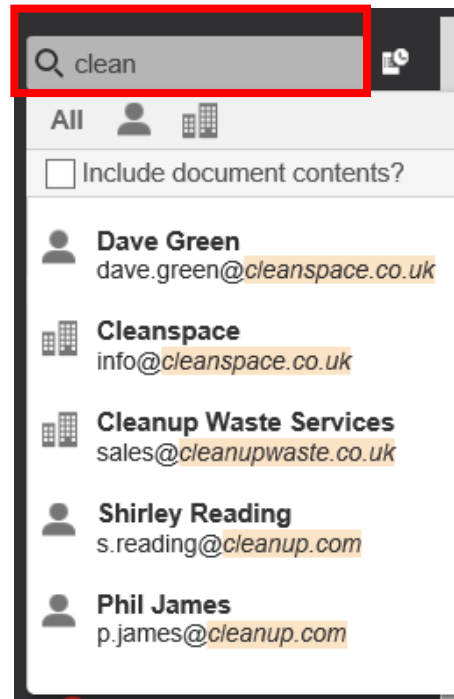




## Searching

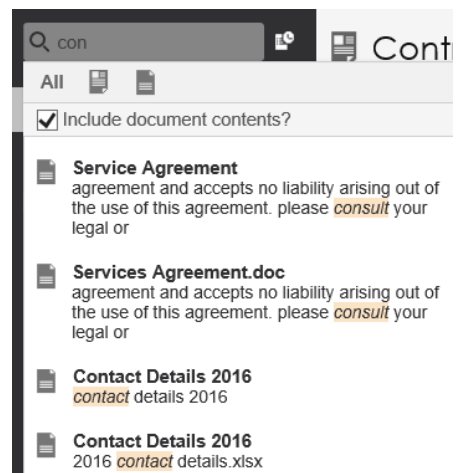
- The Search function will search the entire database to find the record you are looking for.
- When you start typing in this field the solution will display a list of records that match your search criteria.
- The Search results are displayed in a pop up list

**Note:** Along the top of the results there are icons you can select to filter those results.



- Select the record you require and the solution will automatically open that record

- The 'Include Document Contents?' option searches within uploaded documents, to find all documents that contain text that match your search text.



## Adding a Contract

- To create a new contract first navigate to the contract tab and click the [New] button.
- When creating a contract, first select its Type. Once the type is selected the relevant fields will appear for that type.

Type *	-none-
Title	Construction
	Energy & Utilities
	Facilities
	Finance

- Fields marked with a '\*' are mandatory and must be filled in. If they are left blank you will be unable to save your work.
- Once you have filled in all of the relevant fields click 'Save' to save the contract.
- The contract will now be in the system and viewable from the summary view.

## Editing Contracts

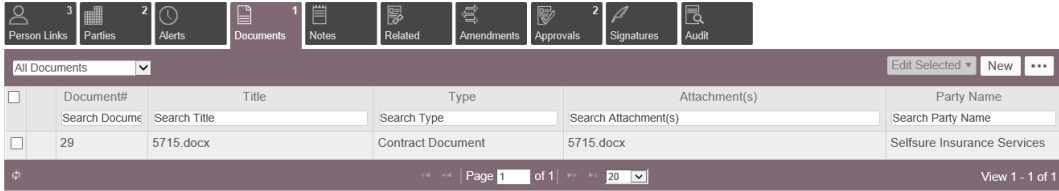
- Full Edit of an entire contract can be achieved by pressing the [Edit] button on the top of the page, this will open up all fields for editing.
- Click save after you have edited the fields
- Inline Edit is editing a single field within a record, if you place the cursor over the field then an 'Edit' option will appear, click this and the single field will become active for editing.

Title	Buildings Insurance	Edit
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- Now click save

## Adding Notes and Documents

- Underneath each contract is a series of sub-tabs listing all linked information. Click through the tabs to see all linked information.



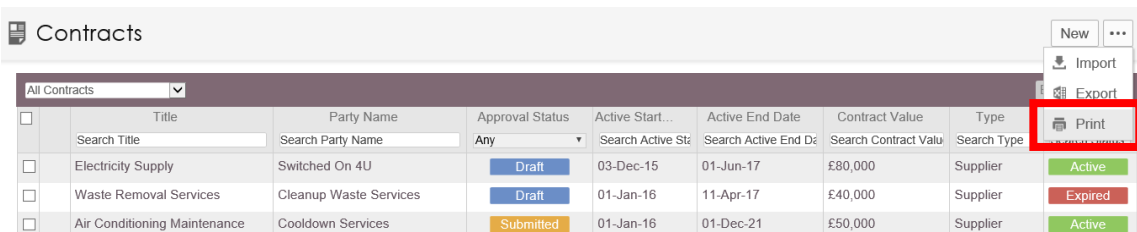
- To add a records to the sub –tab area, click on the [New] button



- Fill in the form and click ‘Save’

## Printing

- You can create a print view of any record, summary table or sub-table in the system pressing the [...] button to the top right of any record or summary table and selecting the print option.

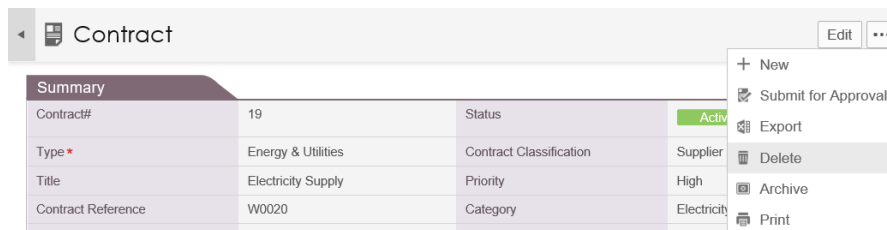


	Title	Party Name	Approval Status	Active Start...	Active End Date	Contract Value	Type
	Search Title	Search Party Name	Any	Search Active St...	Search Active End D...	Search Contract Valu...	Search Type
<input type="checkbox"/>	Electricity Supply	Switched On 4U	Draft	03-Dec-15	01-Jun-17	£80,000	Supplier
<input type="checkbox"/>	Waste Removal Services	Cleanup Waste Services	Draft	01-Jan-16	11-Apr-17	£40,000	Supplier
<input type="checkbox"/>	Air Conditioning Maintenance	Cooldown Services	Submitted	01-Jan-16	01-Dec-21	£50,000	Supplier

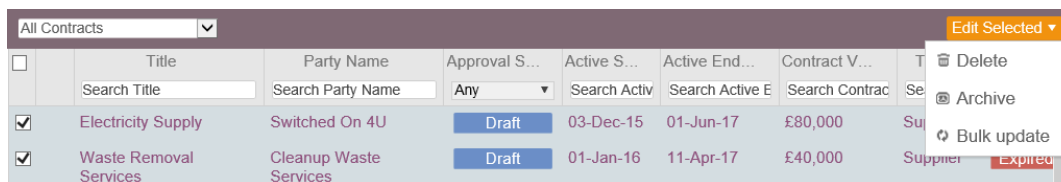
- If you’d like your data exported to an excel spreadsheet rather than a printout you can use the export button.
- Click ‘Export’, check the record types you would like to export and click ‘Export’. The export will be sent to the batch queue where it can be downloaded.

## Deleting and Archiving

- You can delete a record by opening it and clicking the [...] button and selecting the relevant action. Deleting it will send the record to the recycle bin. Archiving it will send the record to the archive vault.



- Records can also be deleted/archived in bulk from the summary view.
- Check the records that you wish to delete/archive and click the relevant button from 'Edit Selected' menu.



## Getting Support

If you need help you can contact intelligentcontract support. Click 'Support' at the top-right of any screen to open the support menu.

### Support Centre

Visit our Support Centre to have access to articles covering all aspects of intelligentcontract

### Submit a ticket

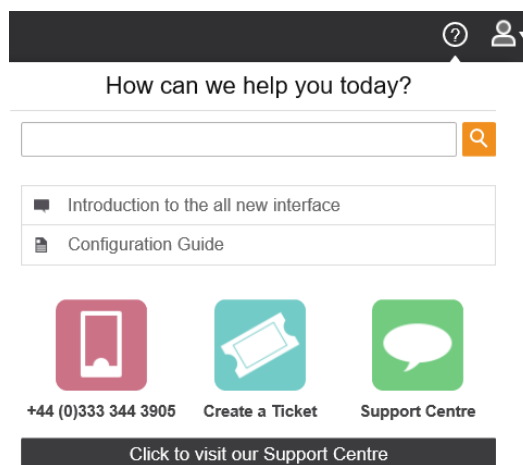
Send us a support email. We'll get back to you and track your issue

### Live chat

Use in browser text chat to get immediate help from a support agent

**0333 3443905**

Call to speak to a support agent



Note: Helpdesk is open UK hours of 9:00 – 17:30 Mon-Fri excluding Bank Holidays