RAPID ESTIMATOR
PRO EDITION

Working With Contracts

Rapid Pro provides our users with nine pre-made contract templates to choose from. We also provide all the necessary tools needed to create a contract of your own if you choose to do so. Users may also copy a contract they already have right into the program simply by using the copy/paste features. Follow the steps below to modify one of our contract templates, create your own contract or use one of your own existing contracts.

To modify one of our contract templates using these steps:

- Click on the 'Contracts' tab.
- The column on the left contains two boxes. The top one 'Template Contracts' is the list of pre-made contracts you can choose from. This is also the location where contracts you create can be found. The box on the bottom 'Estimate Contracts' is the location of any contracts you have saved for each of your estimates and will only show if you have the estimate open.
- Located just above the top box are two tabs, one is 'Contracts' which is the tab you are currently in. The second tab is 'Merge Fields'. Merge fields are placement holders for any data that changes from one client to another allowing the program to fill in these areas automatically so long as you have entered the information in the customers file and/or the contractors file.
- To make any permanent modifications to a template, be sure to have all estimates closed.
- Click on the template you wish to modify.
- To enable any editing, you **must** click the 'Show Field Text' option first. This will activate the editing features.
- Merge fields used will have curly brackets around them and will also show a hand when you hoover your mouse over them. For instance, {Client Name} would be a merge field. Click the 'Show Preview' option and the program will automatically change the merge field to the actual client name of the open estimate.
- To delete any merge field, click the merge field and then select 'Delete Merge Field' from list of options across the top. To insert any merge field, click the location in the contract you would like to place it, then select the merge field from the list on the left and click 'Insert Merge Field' from the options across the top.
- When you are finished modifying a contract, simply click 'Save Contract'. If you would like to give your newly edited contract a different name, click the 'Save Contract As' option, give it a name and click 'Save' when finished.

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To create your own contract from scratch:

- To create a contract from scratch be sure you have no estimates open.
- From the 'Contracts' tab, click the option to 'Add Contract'.
- Type in a title and click 'Save'
- Be sure to click 'Show Field Text' before you start and follow the editing steps above.
- Once you have finished creating your contract, select 'Save Contract As', type the title name once more and choose 'Save'
- Open or create an estimate, select the contracts tab, choose your contract and click 'Show Preview' to see your contract in action.

To copy and paste an existing contract located on your computer:

- Locate your contract in which it is stored on your computer.
- Once your contract is open press and hold the 'Ctrl' + 'A' on your keyboard to copy entire contract.
- From the 'Contracts' tab in the 'Rapid Pro program, click the option to 'Add Contract'.
- Give your contract a title, select 'Save' and then press and hold the 'Ctrl' + 'V' on your keyboard to paste your contract.
- Click 'Show Field Text' and follow the editing steps above.

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