CONTRACT ENGINE GUIDE

Your Business. Your Terms.

Getting started:

You can access Contract Engine by visiting www.bizezia.com and logging into your My Bizezia dashboard. Here you will see a link labelled 'view' – when you click on this you will automatically be logged into Contract Engine.

Welcome page

This is the first screen you see every time you log into Contract Engine. This page lists the latest updates of Contract Engine, and any issues you should be aware of. When you click 'Next' you will be taken to:

New or existing client

You can choose to work with a client that has already been added to the system, or alternatively add a new client. "New client" doesn't mean a new client of the firm but simply a client that is not currently on the system.

If you choose to add a new client, you will be taken to:

Client details

This information (apart from the email address) will appear at the end of all existing engagement/client care letter you create.

Fill in the client details:
Contact Name - full name of your contact
(e.g. Mr John Doe)
Client Name - full client/company name
(e.g. JD Consulting Ltd)
If you are working with an individual client instead of a company, leave out 'Client Name'
Address
Postcode
Country - if required
Email

Click 'Next' to save details (you will have a chance to amend these details next time you choose to work with this client or you can issue an amended contract). You will then be taken to:

Terms and Conditions

You can now choose to edit the Terms and Conditions letter, or leave as it is. When you click 'next' this will be saved to the system, and you will be taken to '**Options**' (see below).

We include most, if not all, of the relevant Professional Bodies on the Terms and Conditions letter which can be deleted as applicable. This saves you having to add them manually each time, if however the Professional Body details that appear are incorrect, please contact us (info@bizezia.com)

If you choose to **'Work with an existing client'** you will be taken to:

Client selection

Choose the client you wish to work with from the drop down menu.

The list of clients is ordered alphabetically, with individual clients shown first (in brackets), followed by company clients (ordered by company name, with the contact name in brackets).

The date (in brackets) shows when the client contract was last accessed on the Contract Engine.

Select a client then click 'Next' to work with them. You will be taken to:

Options

In this section you can choose:

Edit an existing engagement/client care letter
This will allow you edit any existing engagement/client care letter that has already been created for the selected client (including the original Terms & Conditions letter)

Add another existing engagement/client care letter
This will allow you to create another existing engagement/client care letter for this client, from a choice of over 150+ for accountants and 200+ for lawyers

Delete existing an engagement/client care letter(s)
This will allow you to delete existing engagement/client care letter(s) that have already been created for the selected client

No further existing engagement/client care letter
This will take you to screen which allows you to save chosen engagement/client care letter to your local drive, or email it to yourself or others.

If you choose:

Add an engagement/client care letter

You will be asked to choose a category from a list (see below), and once a category has been selected the relevant engagement/client care letter will appear in the drop-down menu below. Choose an engagement/client care letter, then when 'Next' is clicked you will be taken to the editing screen

There are 150+ choices of engagement letters (accountants) and 200+ client care letters (lawyers), which are divided into categories:

Contract Engine Accountants

- My Personal Library
- Accounting
- Audit
- Business Development Services
- Company Secretarial
- Employment
- Financial
- Special Assignments
- Suspension of Services
- Taxation

Contract Engine Lawyers

- My Personal Library
- Charities
- Commercial
- Corporate
- Disengagement/Ceasing to Act
- Employment Law
- Family Law
- File Administration
- Immigration and Naturalisation
- Insolvency
- Litigation (Commercial and Criminal)
- Private Client
- Property
- Speciality
- Taxation

You can find a list of engagement/client care letters by visiting your industry page which is http://www.bizezia.com/products/industry/accountants/contract-engine for accountants and http://www.bizezia.com/products/industry/lawyers/contract-engine for lawyers (scroll to the bottom of the page to download the PDF list)

If you need a new engagement/client care letter that isn't included in this list and you subscribe to either the Classic or Pro version of Contract Engine please let us know by emailing us at info@bizezia.com and we'll do our best to write one for you.

There is also the choice of adding engagement/client care letters to 'My Personal Library', your own library of engagement/client care letters which only you can view. You just need to edit the engagement/client care letter and then upload it to your personal library – you can then select the edited letter for any client, meaning you won't have to keep editing the same letter again and again.

If you click 'Next' you will be taken to:

Edit existing engagement/client care letter

You are now given the chance to edit the chosen engagement/client care letter.

Press 'Next' to save your work and return to the **Options** menu. You will then be given the option to preview.

Once you click 'Next' to save an engagement/client care letter you cannot press 'back' to view it again, but you can get back to it through 'edit existing item'.

Both your own and your client's details are automatically included at the end of the engagement/client care letter.

Recommendations

- We recommend you limit the amount of formatting you use while editing
- We recommend that you preview the document before saving/emailing, to ensure all formatting is correct (you can do this after saving, in the Options screen)

Editing

- The toolbar at the top of the document is the editing toolbar
- This editing toolbar is similar in concept to Microsoft Word (see 'Toolbar functions' section below)
- It is not possible to 'undo' while text is highlighted
- It is possible to copy and paste text from other documents (for example, Microsoft Word)
- It is not possible to insert graphics
- To insert a single spacing, press 'Shift' and 'Return'

Toolbar functions
This will be explained from the left side of the toolbar ('Font Name')

Font Name - the default font on the engagement/client care letters is Verdana. There is a selection of 10 fonts to choose from

Size - this refers to the font size. The default font size of text for the engagement/client care letters is size 2

***Troubleshooting**: Please make sure you are enabling Java scripting and cookies, and please note Contract Engine is best viewed with Microsoft Internet Explorer browser Version 6 or above).*
If you are experiencing problems please call us on: +44(0)870 389 1420

Select All

Cut

Copy

Paste

Undo - you cannot use this function while text is highlighted

Redo - you cannot use this function while text is highlighted

Bold

Italics

Underline

Strikethrough

Superscript

Subscript

Align left

Align Centre

Align right

Justify

Numbering

Bullets

Indent

Outdent

If you choose 'Edit an engagement/client care letter' you will be taken to:

Edit an engagement/client care letter

Choose the engagement/client care letter that you wish to amend from the list.

These documents have already been created for this client - the first date beside the schedule name shows when the document was created, and the second date shows when it was last accessed.

Click on the 'preview' link to view the document.

When 'next' is clicked you will be taken to the '**Edit engagement/client care letter'** so you can amend the selected engagement/client care letter (see above)

Note: You can only choose one engagement/client care letter to edit.

Delete engagement/client care letter(s)

This will allow you to delete an engagement/client care letter from the system that has already been created for the selected client.

The first date beside the schedule name shows when the document was created, and the second date shows when it was last accessed.

Click on the 'preview' link to view the document.

Select the engagement/client care letter(s) that you wish to delete.

When 'Next' is clicked the documents you have selected will be deleted from the system, and you will be taken back to the 'Options' screen

When you choose '**No further engagement/client care letter'** you will be taken to:

Delivery Details

We recommend that you preview the document in this screen, if you haven't already done so, to make sure the document is formatted correctly.

The list at the top of the screen shows every engagement/client care letter that has been created for this client. The first date beside the engagement/client care letter name shows when the document was created, and the second date shows when it was last accessed.

Click on the 'preview' link to view the document.

You can choose which documents you would like to include on the PDF document that will be delivered to you and your client by either leaving or un-ticking the ticked boxes.

The documents left ticked can be delivered to you in PDF format by the following means (please tick the boxes of the options you would like):

Save As, to your local drive
Please wait for the pop-up box to appear on the next screen (this can take a few seconds depending on the size of the document, and the speed of your computer), and then click 'save'
NB. If you choose to save to your local drive, make sure you are allowing pop ups

E-mail

The default setting is to email to your client, but can be changed manually (so you have the facility to only email it to yourself)

If emailing to a client, please read the instructions below:

From address - your email address will automatically be included in the 'From address' field
From name – this will appear in the 'From' field of the recipient's ('To address') email, to show them who the email is coming from
To address - the email address filled out in this client's details will automatically be included in the 'To address' field
To name – this will appear in the 'To' field of the recipient's (CC) email, to show where the email was sent

CC - You can also choose to Copy yourself in on this email, by entering your email address into 'CC' field
Subject – this text will appear in the 'Subject' line of the recipient's email
Message – if you are sending the email to a client, please personalize the email

Once you have chosen how you would like your document delivered (you can choose both options if you wish), click 'Next' and your document will be saved/emailed as requested, and you will be taken to:

Where next?

Your engagement/client care letters have been emailed as requested. If you have selected 'Save As, to your local drive' please wait for the File Download box to appear, then select 'Save'.

You can now go back to the Main Menu and work with another client, or alternatively you can log out.

If you have any feedback or suggestions about the Contract Engine, please email us at: info@bizezia.com