User manual
iContract Module

Revision history

Date	Description of Change	Author
May, 4 2017	v. 0.1 Initial Draft	Oleksandra Mykytenko

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1. INTRODUCTION

Introduction section explains in general terms the system and the purpose for which it is intended.

1.1 System Overview

WHMCS iContract is a module that simplifies the process of making professional designed contracts: simple uploading of the client and product details and sending.

WHMCS iContract allows to:

- Automatically enter your customer's and product's details into contract templates.
- Create a new template for product or service, if needed.
- Write a separate email for each template, including HTML-supported attachments.
- Maintain and manage contracts in multiple languages.
- Manage archive contracts and keep your contacts up to date.
- Create specifically-tailored corporate style of the contracts layout.

1.2 System Configuration

iContract is compatible with WHMCS 6.x.x and 7.x.x. WHMCS 7.x supports PHP 5.6. The application requires connection to Internet in order to save data to database. Data saved in database can be seen using any major Internet browsers.

1.3 User Access Levels

Management options consist of activating and deactivating of the module. Access control allows full admin to define which of the roles can access the module (Configure stage).

2. GETTING STARTED

This guide will walk you through the basics of using iContract including how to create an email templates and send your contacts.

2.1 Installing iContract

Installing iContract Module is very simple. The following steps will guide you through the process:

1. Upload the **icontract.zip** file to your server into **/modules/addons**

2. Unzip the contents of the zip file.

3. Login to the WHMCS Admin Area and configure your module (see the next unit).

2.2 Activate the Module

To activate iContract Module:

1. Hover the **Setup** tab.
2. Click on the **Addon Modules**.
3. Click on the **Activate** button near the **iContract**.
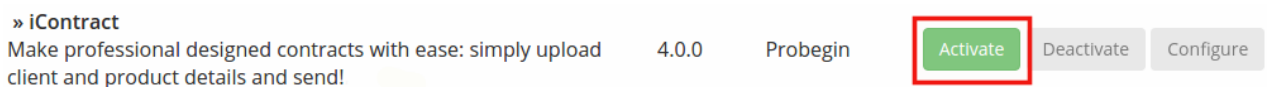
4. Click on the **Configure** button.
5. Select roles which can access the module (**Full Administrator** is recommended).
6. Click on the **Save Changes** button.

2.3 Settings tab

Users must be licensed. License key can be added and data adjusted on **Settings** tab:

License: *

✓ [blurred license key] 📇

Language:	English ▾
Date Format:	YY-MM-DD ▾
Timezone:	Australia/Adelaide ▾
Currency:	USD ▾

| **Confirmation To:** * | name@mail.com |
| **Test Address:** * | name@mail.com |

Standard Logo: Browse logo.png

Signature: Browse sign.png ⊖ First Name Last Name

Add Another signature

Footer Details:

Email	info@yoursite.com	Text Colour:	FFFFFF	⊖
Web	www.yoursite.com	Text Colour:	FFFFFF	⊖
Bank	1234.56.789	Text Colour:	FFFFFF	⊖
Tel	+31 (0)10 569 854	Text Colour:	FFFFFF	⊖
IBAN	IBAN Number	Text Colour:	FFFFFF	⊖
Facebook	facebook.com/your:	Text Colour:	FFFFFF	⊖
VAT	VATnumber	Text Colour:	FFFFFF	⊖
SWIFT	SwiftCode	Text Colour:	FFFFFF	⊖

Add Another Footer Detail

Cancel Save

1. Hover the **Addons** tab and click on the **iContract** module.
2. Go to **Settings** tab.

3. Fill the **License Key** field in order to use all the features within this module.

4. Select the **Language**: English or Dutch.

5. Choose a **Date Format, Timezone and Currency**.

6. Fill the **Confirmation To** field to get email when your contract is sent and set the **Test Address** where all test letters will be sent to.

7. Choose and upload your **Standard Logo**.

8. Add/Edit your **Signature**:

   - Enter your First Name and Last Name.
   - Choose a file for your signature.

9. Add/Edit the **Footer Details** fields.

10. Click on the **Save** button.

11. Discard all changes by pressing the **Cancel** button.

Congratulations! Your iContract module is ready to use.

3. USING THE MODULE

WHMCS iContract is the module to send clients reminders about unpaid invoices.

3.1 Template tab

To create or edit standard templates, follow the steps below:

Language:	Dutch ▾	Create New Template
Template:	Example Contract Dutch ▾	

Template Name: Example Contract Dutch

{$company_name}, een vennootschap opgericht naar het Nederlands recht, kantoorhoudende te Amsterdamseweg 123, 1224 AA te Amsterdam (hierna te noemen "JD"), enerzijds.

en

{$client_company}, een vennootschap opgericht naar het Nederlands rechts, kantoorhoudende te {$client_address1}, {$client_postcode}, te {$client_city} (hierna: "Opdrachtgever"), anderzijds.

Verklaren te zijn overeengekomen als volgt:

Company: Browse

Email HTML Text:

Email subject: Overeenkomst {$company_name} {$c

Beste {$client_first_name},

Bedankt voor uw vertrouwen in {$company_name}.
Zoals beloofd stuur ik u hierbij onze licentie overeenkomst.

Zou u zo vriendelijk willen zijn deze door te nemen en ons een getekend exemplaar retour te sturen. Uw kunt het adres onderaan vinden in deze email.

1. Select **Language** (English or Dutch) for your template.

2. Adjust new template by clicking on the **Create New Template** button or edit an existing by choosing available in the **Template** field:

   - Fill in a **Template Name** and **Email subject**.
   - Enter and format text of the contract and email in text box.
   - Browse **Company** logo.
   - Use the **Shortcodes** - template variables to insert contract information.

3. Save the template by clicking the **Save** button.

4. Discard all changes by pressing the **Cancel** button.

5. Check contract in PDF format by pressing the **Download PDF** button.

6. Remove chosen template by clicking on the **Delete** button.

3.2 Create Contract

The contract can be created by adjusting the Contractual Products you want to send to the Client in the **Contract** tab.

General contract information set up:

1. Choose the **Client** or **Add New Client**.

2. Select **Language** of the contract (languages can be set through Settings).

3. Choose **Use Template** for the contract (templates can be set on **Templates** tab).

4. Set a **Contract Date** by selecting it in the calendarpicker.

5. Set a **Contract Period** by selecting range in the datepickers.

6. Choose the **Currency** (currencies can be set through Setup > Payments > Currencies).

Contractual Products set up:

Contractual Products	☑ Hours	☑ Price Per Hour	☑ Setup Fee	☑ Discount %	Total	☑ Recurring	Taxed
Product 1 ▾	1	20.00	2.00	10	20.39	Monthly ▾	☑ ⛔
+ Add new line							

SUBTOTAL $	19.80
3.00 ▾ VAT	$ 0.59
TOTAL $	20.39

1. Select **Contractual Products** you want to send.

2. Custom values of **Price Per Hours, Setup Fee** can be entered. Default values for each **Recurring** option are defined in *Setup > Product Services > Product Services > Contractual Product > Pricing*.

3. Fill **Hours** (1 - is default value), **Discount %** fields

4. **Total** and **SubTotal** are calculated by system.

   Total=Hours×PricePerHours+SetupFee-Discount%+Taxed.

   SubTotal=Hours×PricePerHours+SetupFee-Discount%.

5. Select checkbox in the **Taxed** column to include tax (VAT) for this product.

6. Uncheck the boxes in Hours Price, Price Per Hours, Setup Fee, Discount % and Recurring columns if you do not want to display these data in the Contract PDF.

7. Click on the link **Add New Line** to add another product.

8. Remove the line by clicking on the **Delete** icon on the product line.

Sending Contract:

1. A preview of the contract can be opened by clicking the **Download PDF** button under the table.

2. Send a test version of the contract and email it to your mailbox (mailbox can be set in settings) by pressing the **Test Send** button.

3. Send the contract to client by clicking the **Send Contract** button.

3.3 Archive tab

All Contracts which were sent are available in the **Archive** tab. You can overview and manage of all sent items of the contracts:

ID	Name Client	Start Date	Expiry Date	Uploaded Files	Resend Contract	Send Reminder	Signed	
3		2017-04-27	2017-05-17	1ad500f1-docu ▾ ⊖⊕⊕	Resend Contract	Send Reminder	Yes ▾	⊖
4		2017-03-14	2017-07-20	⊕	Resend Contract	Send Reminder	No ▾	⊖
				First << 1 >> Last				

Cancel   Save

1. Select the quantity of items to **Show Per Page** (10, 25, 50, 100).

2. Filter data using **Search** by ID, Name Client, Start Date or Expiry Date and **Period** datepickers by Start Dates.

3. **Sort** data by ID, Name Client, Start Date or Expiry Date.

4. **Download** a contract that was sent to your client by clicking on the **ID** number of the exact contract.

5. You can upload new document for a contract by clicking ⊕ button (for e.g. document that approve that contract was signed) in the **Uploaded Files** column. Click on the **Save** button.

6. If there is a file in the Uploaded Files column, you can **Download** by clicking on the ⊕ button or Delete by pressing on the ⊖ button this selected document.

7. You can resend the contract to your client by pressing on the **Resend Contract** button and **Save** changes.

8. Send reminder to your client by clicking on the **Send Reminder** button and **Save** data.

9. Hover mouse the **Resend contract** and **Send reminder** buttons and you can check when it was sent previously.

10. Remove the contract data by clicking on the **Delete** icon.

11. Mark a contract as signed/not signed by selected **Yes/No** in the **Signed** column and pressing the **Save** button.

12. Check the **Pagination** - go to other pages using First, Last, Previous, Next links and page numbers link.

13. Discard changes by pressing the **Cancel** button.