Contract Module

- Add/Edit Contracts
- Manage Filters on the grid
- Search for an existing Contract
- Export to Excel
- Add Contributors
- Manage Contract Custom Fields
- Related Documents
- Configuration of Contract Types from "Settings"
- Configuration of Party Categories from "Settings"
- Configuration of Approval Center from "Settings"

How to access it

From the main menu, choose **Contracts**.

Contract module has 3 sub-tabs:

1- **List All Contracts**: This is by default the grid that centralizes all Contracts.

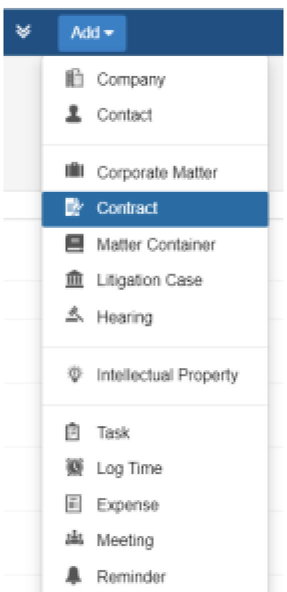
2- **Awaiting Approval**: This is by default grid that filters the Contracts that are awaiting Approval by any App4Legal users.

3- **Awaiting Signature:** This is by default grid that filters the Contracts that are awaiting Signature by any App4Legal users.

Add/Edit Contracts

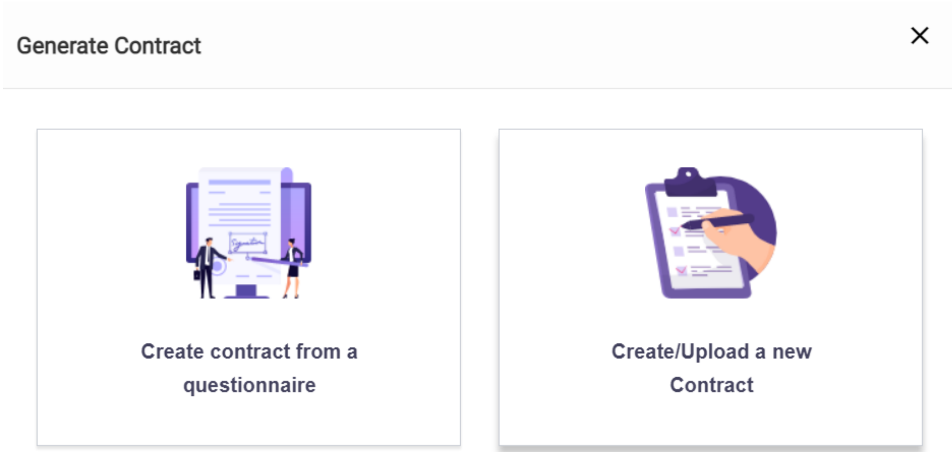
You can add a Contract to your App4Legal Contracts database:

From the Quick Add drop-down list, choose Contract



There is two options to generate a contract:

1. Create a contract from a questionnaire
2. Create/Upload a new Contract



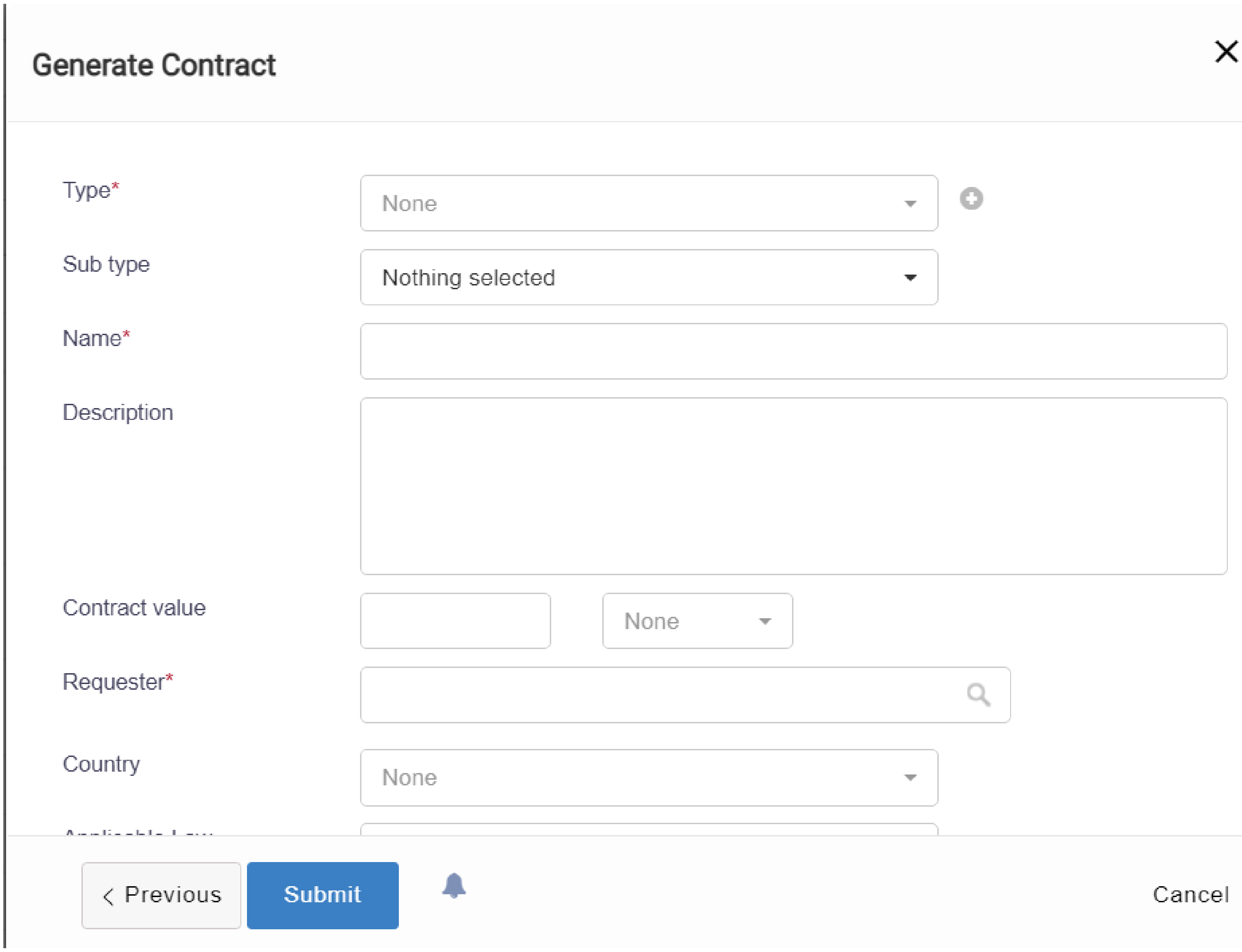
- If you choose create a contract from a questionnaire, you will be redirected to a page to choose the template, enter the document name and then press on the next button.

Fill in the data and press on Submit. The template data will be configured from the settings.

- If you choose Create/Upload a new Contract:

The Add form of a Contract has the basic data that needs to be inserted. The mandatory fields are the ones in red only. After adding a Contract, it will be designated by a **Contract ID** that is automatically generated by the system. Once the user clicks on the Contract ID from the grid, the Contract form opens where the user can be view/edit the Contract data. Also from the action wheel next to a Legal Matter entry, choose View/Edit.

A Contract form has a lot of important data to be tracked such as :

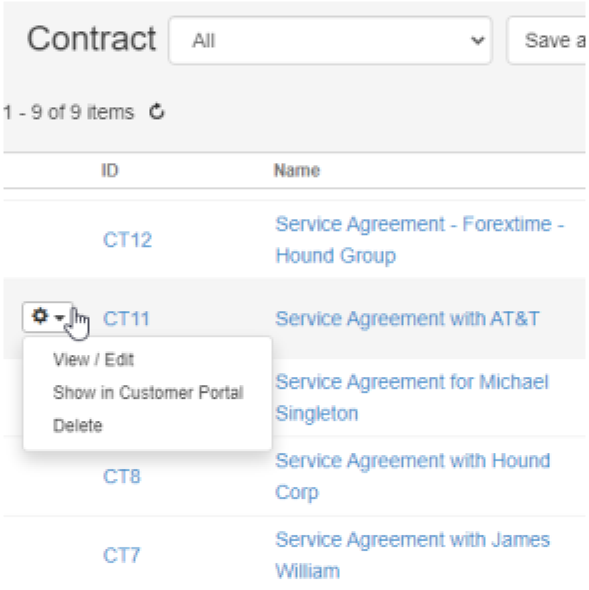


- **Contract Type**: A defined list that can be customized in the Admin & Setup or on the fly.
- **Name**: Name/Title of the Contract
- **Description**
- **Value**: A value of Contract and a field with all the currencies
- **Requester:** Requester of the Contract
- **Parties:** All Companies/Contacts involved in this Contract
- **Assigned Team:** Medium to Large teams may wish to divide the Legal teams based on their specialty. Teams are managed through the Admin & Setup-> Assigned Team. By default all Users belong to an Assigned Team called All Teams.
- **Assignee**: The App4Legal user who is assigned on this Contract who compulsorily has to belong to the above chosen Assigned Team. This is managed through the Admin & Setup-> Users & Permissions section-> Manage Users. Within the User form, go to Personal information and choose the **Assigned Team** field to be the appropriate Assigned Team so that the name of the user appears in the drop-down list.
- **Status Comment**: It is a small text field that resembles the last updated Status of the Contract in brief(Edit form)
- Dates such as Contract Date, Start Date, and End Date. The Contract Date should always be greater than the Start Date. The End Date is always greater than the Start Date.
- Priority: A defined list that is hardcoded.
- Status: A defined list that can be managed in the Admin & Setup.
- Renewal: A defined list that can be managed in the Admin & Setup or on the fly.
- Reference number: It is the internal numbering of a contract. This is the firm's reference to the file number of the contract.
- Contract Details such as Description.

Back to Top

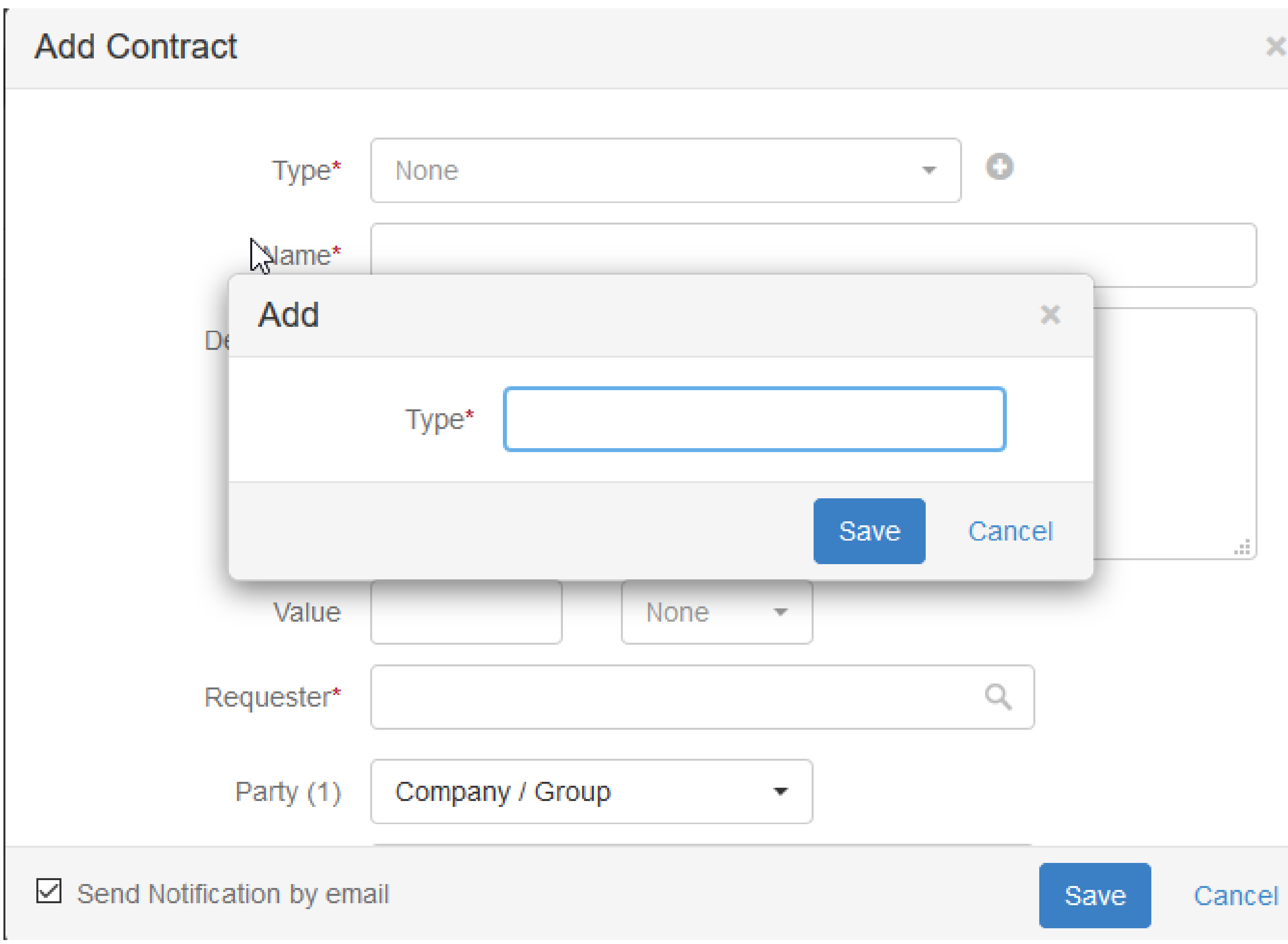
Delete a Contract

From the action wheel next to every Contract, there is a Delete action.

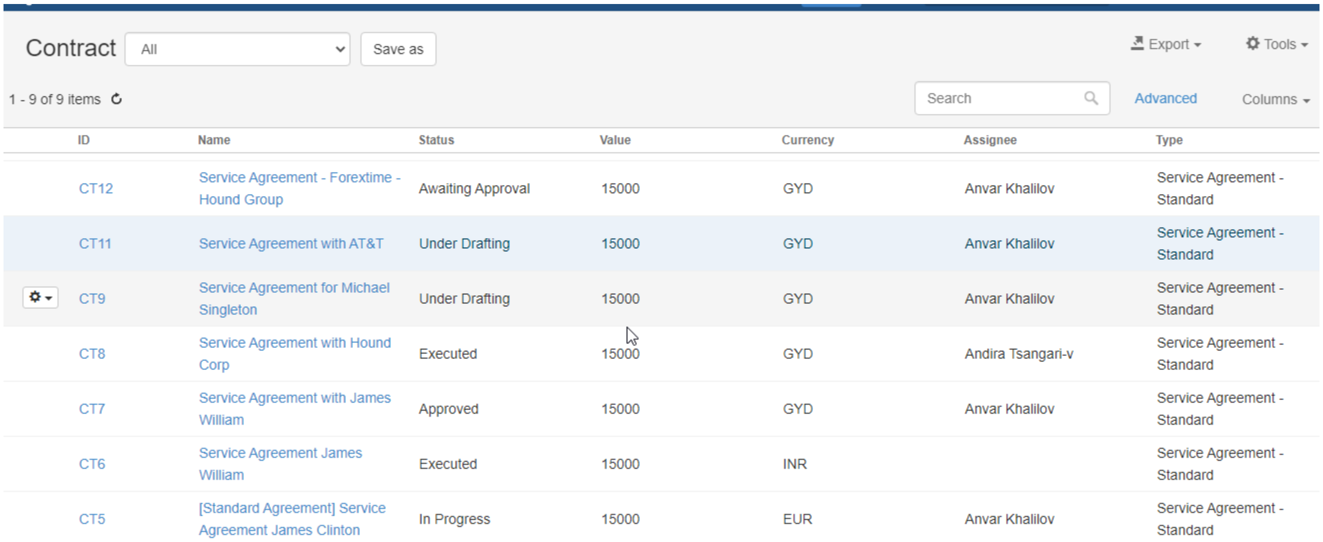


[Back to Top](#)

<u>Add Configurations on the fly</u>
All drop-down lists in App4Legal are configurable through the Admin & Setup. Luckily, some configurations can be configured on the fly. For instance, in the Contract form, a user is adding data and wants to have a new Contract Type swiftly. There is a blue plus sign that can assist the user to add a new value to the Contract Type drop-down list on the fly.



Manage Filters on the grid



Back to Top

Search for an existing Contract

You have 3 methods to search for a Contract: Quick Search, Advanced Search, and Universal Search.

- In **Quick Search**, you can type any word from the Name/Description field of a Contract and hit Enter from your keyboard to generate your search results.
- Using **Advanced Search**, you can run your search on a specific field from the Contract form. You'll have the possibility also to modify the operator of the search for each field (i.e. equal, begins with, contains, >, <, and more). the Advanced Search menu is hidden by default; you need to click on the link Advanced Search to unhide it.
- With **Universal Search**, you can type any word from the Name/Description field of a Contract and hit Enter from your keyboard to generate your search results.

Back to Top

Export to Excel

The Contracts grid can be exported to an excel sheet at any moment via the Actions button on the grid-> Export to Excel. Also, search results can be exported to an excel sheet separately.

Back to Top

Add Contributors

You can add the contributors to the Contract in the add/edit of the Contract.

Back to Top

Manage Contract Custom Fields

Configure the Contract Custom Fields in the Administration & Setup per Contract Type.

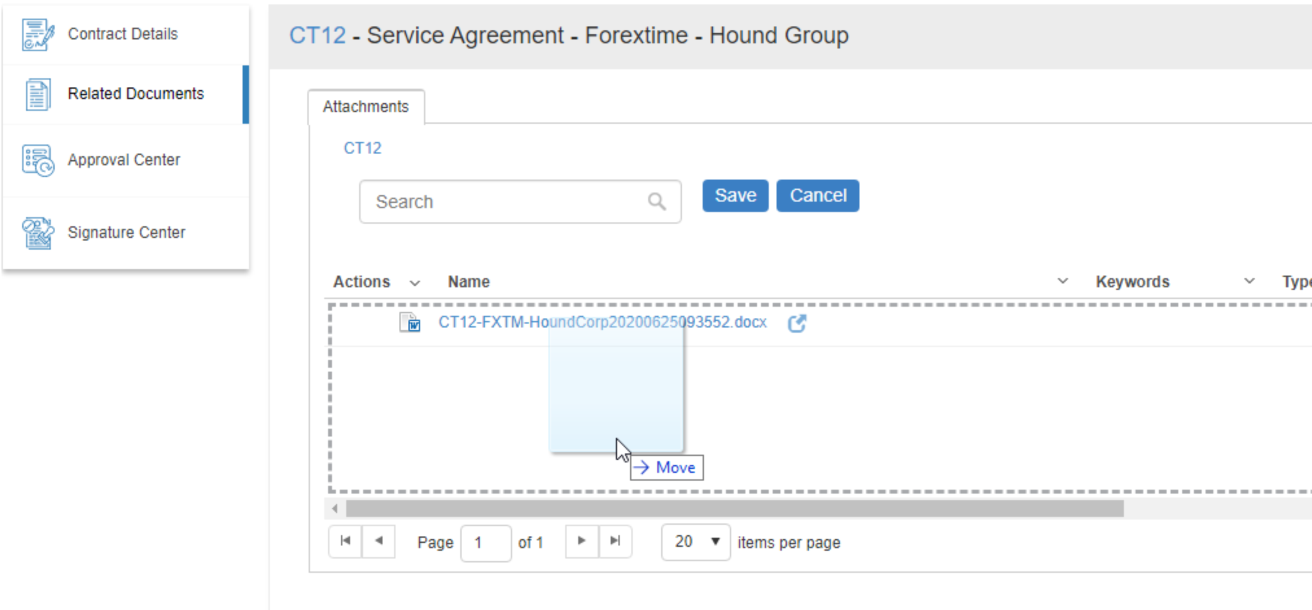
Back to Top

Related Documents

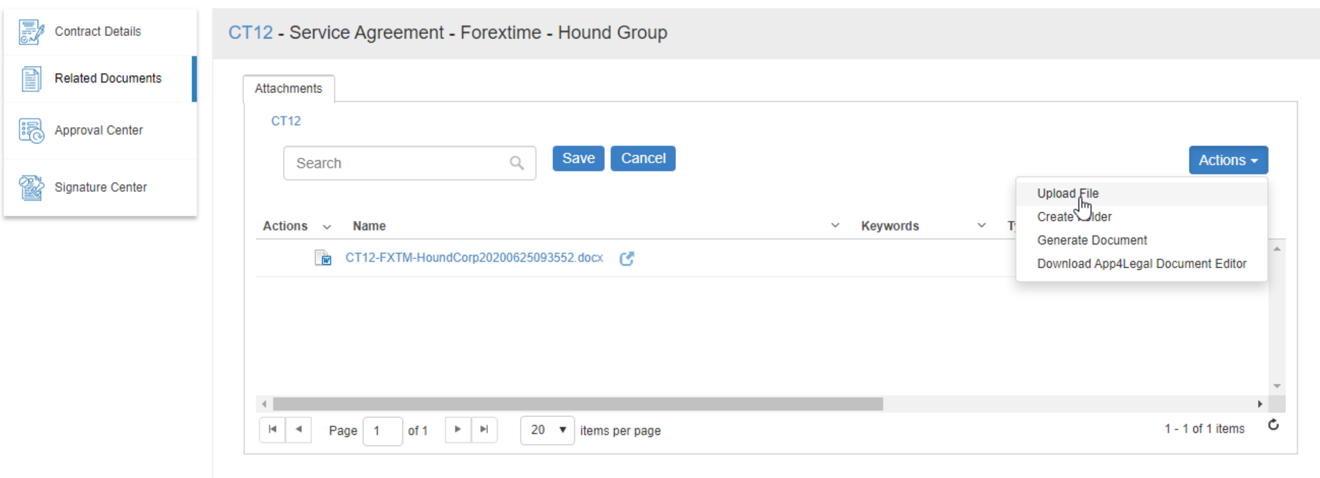
The user can relate Documents to a Contract such as Agreements, Contracts, NDAs, etc.. Documents can be arranged in folders. Privacy can also be applied on a folder and the privileged user can control with whom to share the file.

Files and Folders can be Categorized by Type, Status, and optional Comments. Contract Document Type and Statuses are managed via the Admin & Setup.

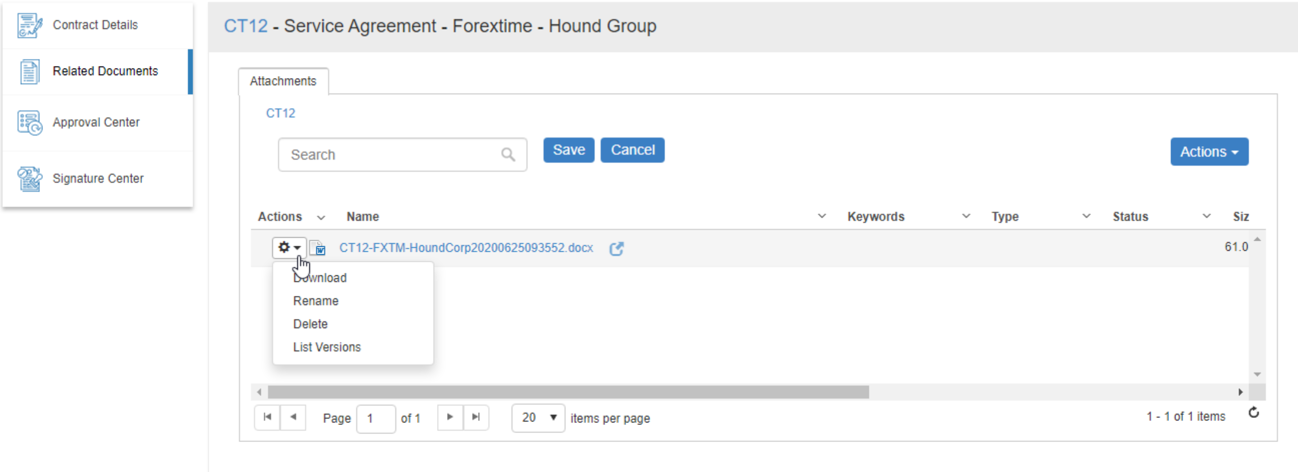
Documents can be related by either physically applying Documents that can be added in 2 ways. Either by the drag-and-drop procedure



or by uploading the files.



Note that if a File/Folder is added/uploaded with spaces in its name, the system will automatically replace the spaces with underscores for technical reasons. After the File/Folder is added, they can be managed using the action wheel on the grid.

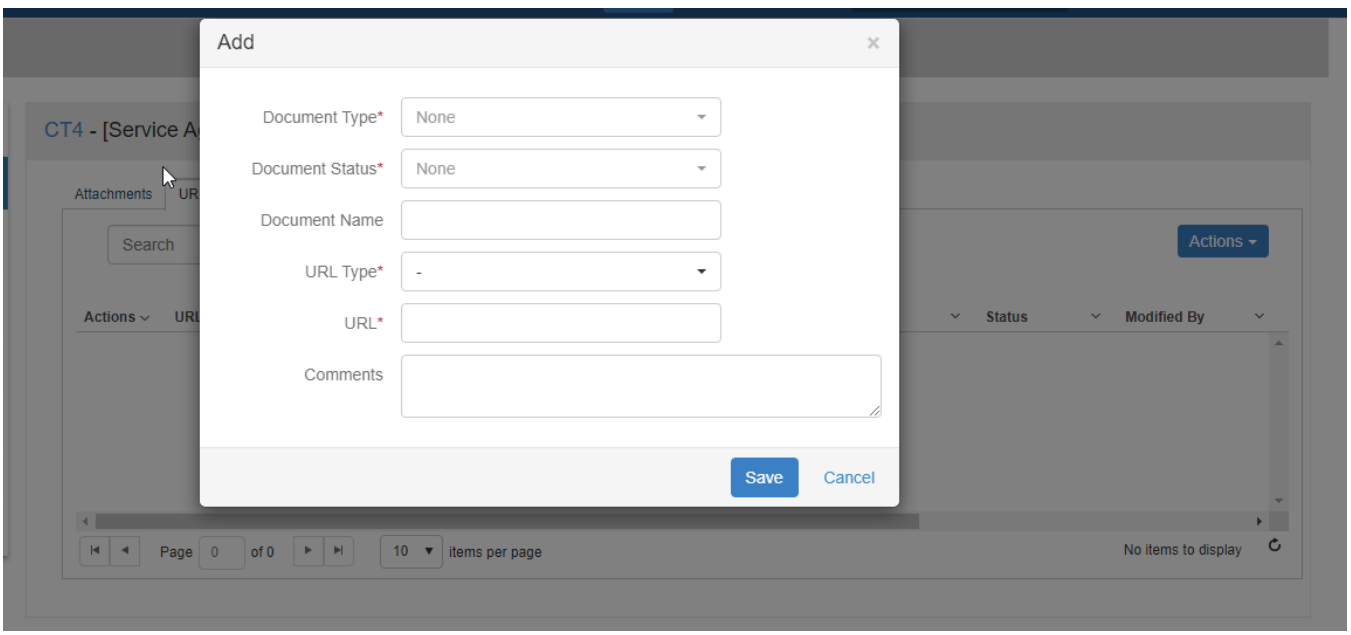


File/Folders can be

- Renamed
- Deleted
- Shared With: Folder can be set as Private that means only the creator can see it and with chosen App4Legal Users if needed. Folders that are locked are designated with a lock sign. Users who are set to Override Privacy can see all Private objects on App4Legal.
- Copy Path: Folder/File paths can be copied in order to be shared with colleagues for fast access.

Through the actions button, a document can also be generated according to a predefined template.

As an alternative to manually adding Files/Folders, and if there's an already implemented Document Management System, you may map a URL to the Contract documents to any Network Drive or Weblink.



- **Inline Edit of Office Documents:**

  App4Legal's Documents module offers a very nice feature that allows the user through App4Legal to edit Office documents. This feature is supported only on **IE 11.** All what the user has to do is click on an Office Document such as a Word document. The user can edit the Document and click Save, the Document will be saved directly in the Documents module.

  If a user has the Document open and is editing it in the meantime if another user tries to open the same Document the system will prompt a message informing the user that the Document is already in use.

  Back to Top

Configuration of Contract Types from "Settings"

You can add/edit/delete the Contract Types.

Settings / Contract Type / Add

Total Records: 17

Type (English)	Type (العربية)	Type (Français)	Edit	Delete
Trading Agreement	اتفاقية التداول	Accord commercial	Edit	Delete
Joint Venture Agreement	اتفاقية مشروع مشترك	Accord de coentreprise	Edit	Delete
Distribution Agreement	اتفاقية توزيع	Accord de distribution	Edit	Delete
Non-compete Agreement	اتفاقية عدم المنافسة	Accord de non-concurrence	Edit	Delete
Non-disclosure Agreement	اتفاق غير معلن	Accord de non-divulgation	Edit	Delete
Partnership Agreement	اتفاقية الشراكة	Accord de partenariat	Edit	Delete
Reselling Agreement	اتفاقية إعادة البيع	Accord de revente	Edit	Delete
Commercial Lease Agreement	اتفاقية الإيجار التجاري	Contrat de location commerciale	Edit	Delete
Consultancy Agreement	اتفاق السفارة	Contrat de consultance	Edit	Delete
Stock Purchase Agreement	اتفاقية شراء الأسهم	Contrat d'achat d'actions	Edit	Delete

Back to Top

Configuration of Party Categories from "Administration & Setup"

You can add/edit/delete the Party Categories.

Settings / Party Categories / Add

Total Records: 6

Category (English)	Category (العربية)	Category (Français)	Edit	Delete
Buyer	Buyer	Buyer	Edit	Delete
Client	Client	Client	Edit	Delete
Consultant	Consultant	Consultant	Edit	Delete
Distributor	Distributor	Distributor	Edit	Delete
Provider	Provider	Provider	Edit	Delete
Seller	Seller	Seller	Edit	Delete

Back to Top

Configuration of Approval Center from "Administration & Setup"

Configure the order and privileges of approving Contract by Contract Type.

Follow the next steps to configure the Approval Center:

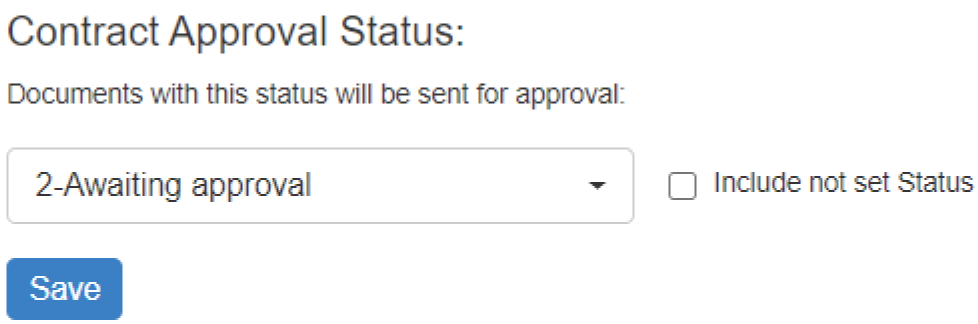
- Go to "Administration & Setup"
- Scroll down to "Contracts" field and choose "Approval Center"

Settings / Approval Center / Edit

Name:

Sales Agreement

- Choose the Document status which will be sent for approval

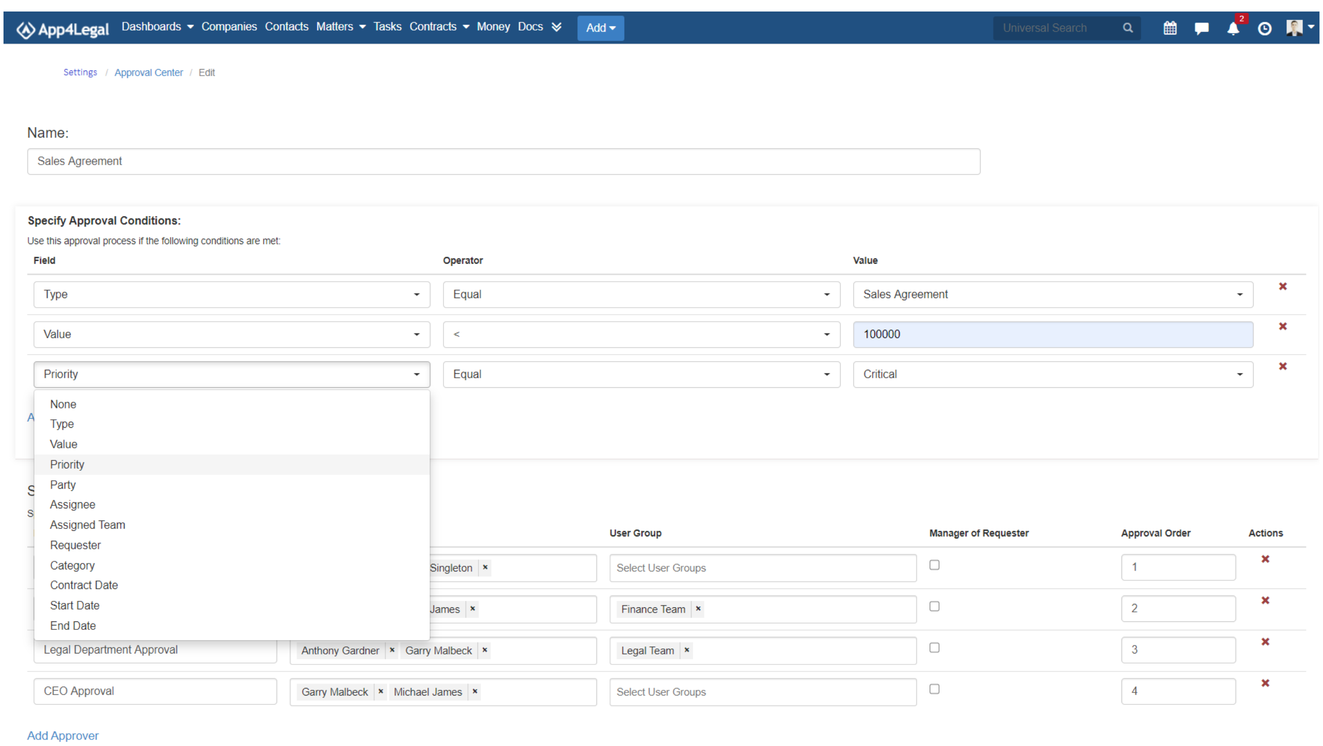


Documents without status can be included by checking the "Include not set Status" box

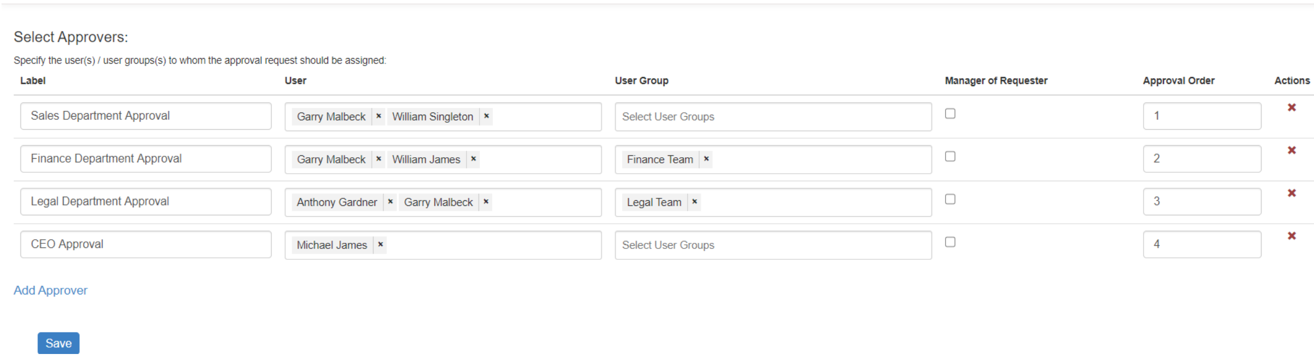
- Create a new approval center by click "Add" button"

- Name the Approval Center depending on Contract Type and criteria

- Specify Approval Conditions by adding the Criteria Logic(fields,operators and value)



- Select Approvers: Specify the User(s)/User Group(s) which are authorized to approve the specific Contract with Approval Orders



- Save the changes

Back to Top