

Contracts & Documents SLA management

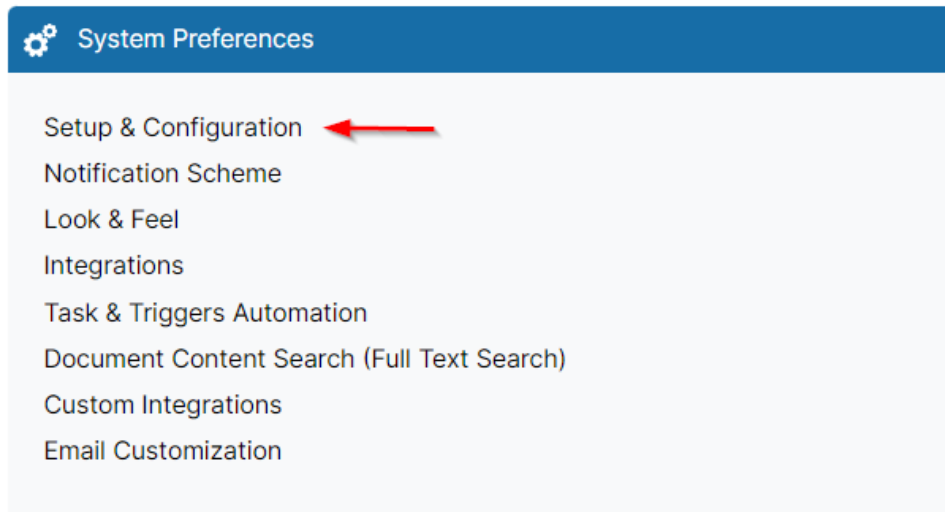
Objectives

- Enable the "SLA Management" feature for Contracts & Documents
- Configure SLA for Contracts & Documents

Steps

In LEXZUR, you can define a target time duration for different contract/document workflow statuses.

To enable this feature, you have to go to **System Settings** and select **Setup & Configuration** from System Preferences.



In the Contract/Document Default values tab, you have to set the default value of "**Allow feature "SLA Management"**" to Yes and click on Save.

Settings / Setup & Configuration

Active Directory

Advisor Portal

Contract/Document Default Values

Client Portal

Default Values

DocuSign Integration

External Links

Hearing Verification Process

Document Content Search

Maker Checker Control

Menu External Links

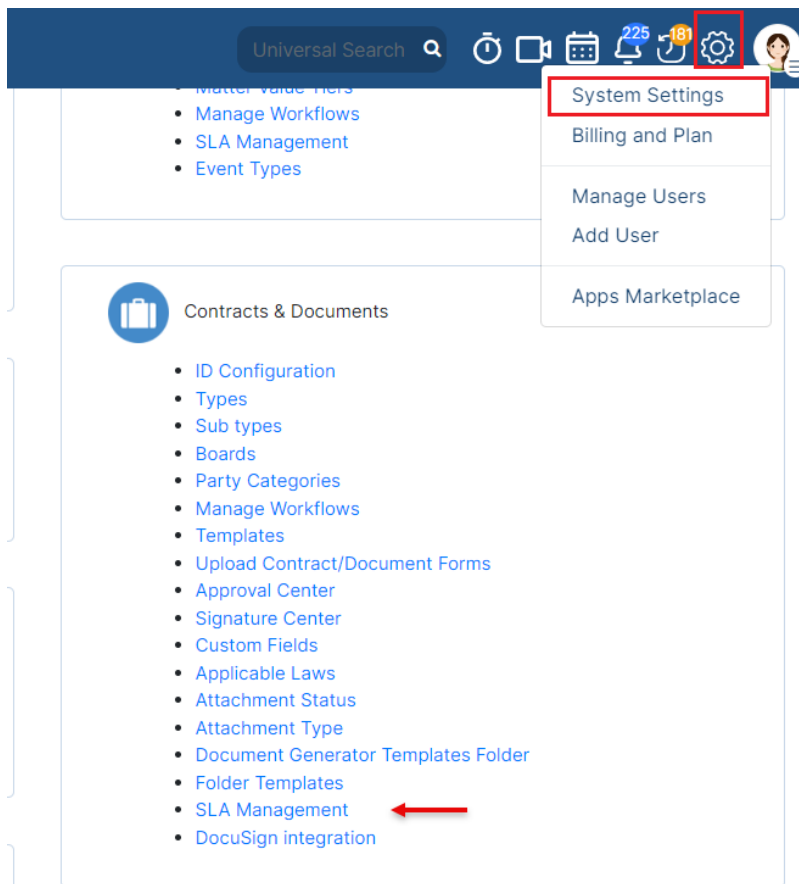
Notifications

Outgoing Mail

Password Policy

Property	Default Value	Actions
Allow feature "SLA Management"	Yes	Save
Archive Status	Executed	Save
Private by Default	No	Save
Reminder Type	system-reminder	Save
Allow Board Members to be selected as approvers and signees	Yes	Save
Allow Shareholders to be selected as approvers and signees	Yes	Save

To manage the SLAs, head to the "**Contracts & Documents**" section **SLA Management**.



You can add, edit or delete SLA.

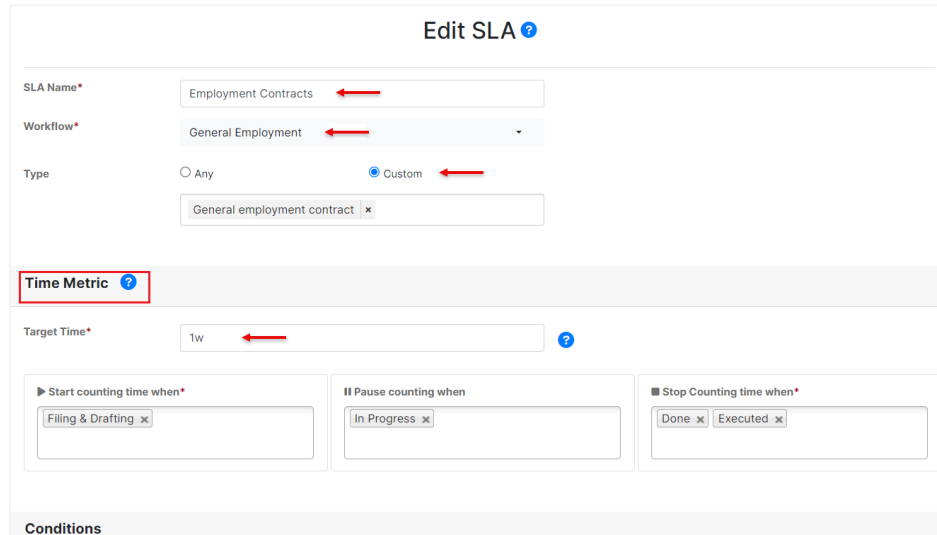
Settings / SLA Management [Add SLA](#)

Total Records: 3

Name	Target	Workflow	Start	Pause	Stop	Edit	Delete
Employment Contracts	1 week(s)	General Employment	Filing & Drafting	In Progress	Done, Executed	Edit	Delete
Urgent Contracts	2 day(s)	System Workflow (default)	Filing & Drafting		Executed	Edit	Delete
Drafting New Matters	2 week(s)	System Workflow (default)	Filing & Drafting	Cancelled	Executed	Edit	Delete

Once adding a new SLA, you have some mandatory fields:

1. **SLA name:** specify the SLA name
2. **Workflow:** select the workflow you want to apply to this SLA



Edit SLA ?

SLA Name* Employment Contracts

Workflow* General Employment

Type ☐ Any ☒ Custom
General employment contract x

Time Metric ?

Target Time* 1w ?

Start counting time when* Filing & Drafting x

Pause counting when In Progress x

Stop Counting time when* Done x Executed x

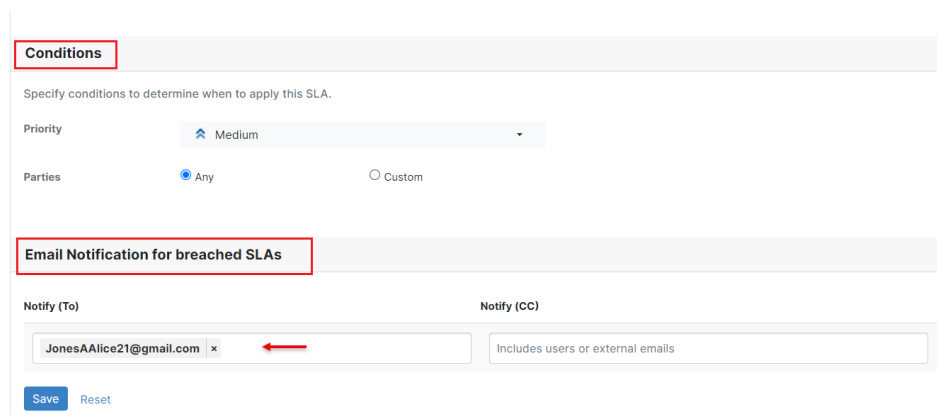
Conditions

This SLA will be applied to any contract type, or you can specify a custom type if needed.

Time Metric section:

1. **Target time:** specify the target time such as in weeks, days, or hours.
2. **Start Counting time when:** choose the starting status(s) to start counting the time
3. **Pause Counting when:** choose the status(s) when you want to pause the counting.
4. **Stop Counting time when:** choose the status(s) when you want to stop counting.

Under the **Conditions** section, you can specify conditions to determine when to apply this SLA like the priority and the parties.



Conditions

Specify conditions to determine when to apply this SLA.

Priority Medium

Parties ☒ Any ☐ Custom

Email Notification for breached SLAs

Notify (To) JonesAAlice21@gmail.com x

Notify (CC) Includes users or external emails

[Save](#) [Reset](#)

In the **Email Notification for breached SLAs** section, you can specify the user that will be notified once the SLA is breached.

To view the SLA elapsed time for a specific contract/document, head to the contract/document and click "**Show SLA elapsed time**" from the three dots.

LEXZUR

Dashboards

Agile

Contacts

Matters

Tasks

Contracts & Documents

Reports

Time

Billing

More

Create +

Universal Search

SEA-168

Service Agreement-David Robinson

Public

In ProgressDraftingActive

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Emails

Time Entries

Details

Type: Service Agreement

Sub type: None

Value: None

Country: None

Applicable Law: None

Termination Clause: None

Workflow Status: T-Executed (Service Agreement)

Priority: Medium

Currency: AED

Reference#: None

Client: None

Add a link: None

People

Requester: Julia Marven

Assigned Team: Contract Team

Assignee: None

Created By: Julia Marven (Portal Use)

Modified By: Alice Jones

Authorized Signatory:

Contributors: None

Watchers: Alice Jones

Collaborators: None

Renew

Create Amendment

Create Addendum

Export to PDF

Show SLA Elapsed Time

Archive

Delete

This will show you all the cycles done at the level of this particular contract, with all the details, what was the target, the elapsed time, and if **Met** the target or was **Breached**.

SLA Elapsed Time			
SLA	Target	Elapsed Time	Status
Urgent Contracts (Cycle 1)	2 day(s)	3 hour(s) 1 min(s)	Stopped - Met

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!