

# How to Manage the Contract Board

## Objectives:

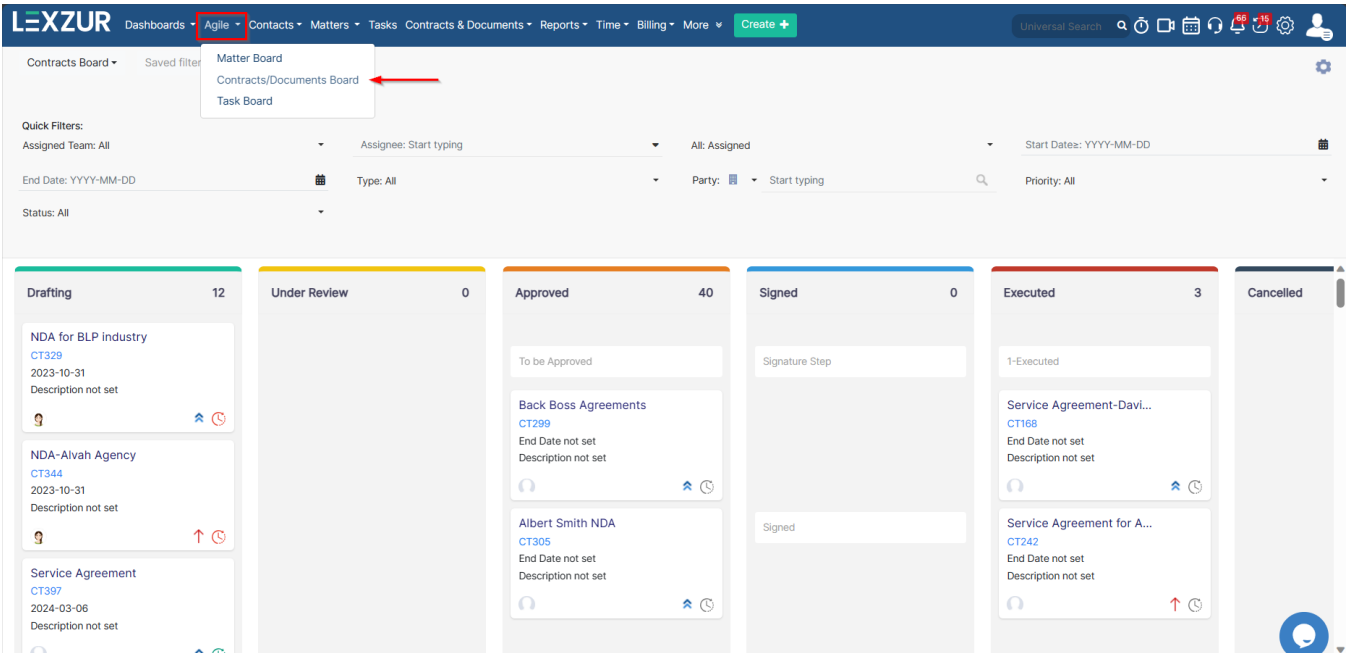
- Monitor your team's performance through the Kanban boards.
- Configure your Contract board.

## Steps:

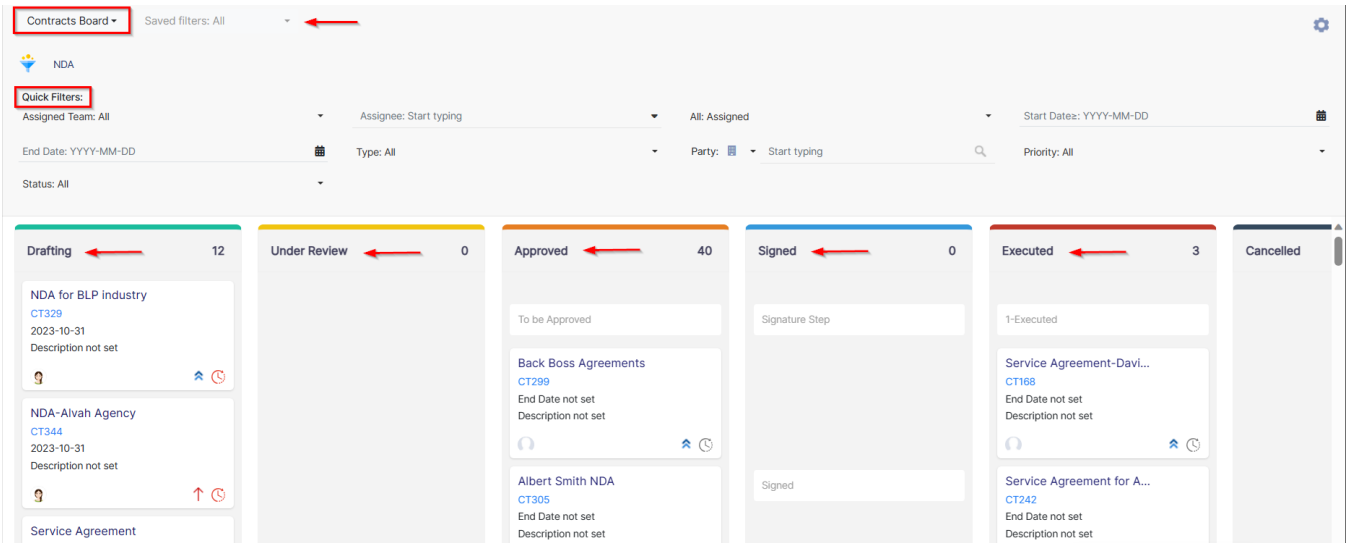
Managers can use Kanban boards to get a 360-degree view of contracts, matters, and task statuses.

## Access the Board:

You can access these boards from the **Agile** in the main menu.



This board can perfectly give an idea about the overall activity of the team, the work progress, and the status of the contracts being handled.



The Color Coding of Matter Priorities is shown on the Board in order to better assist the user in building schedules and action plans. For instance, Critical Matters are in red, Medium Priority Matters are in blue, and so on.

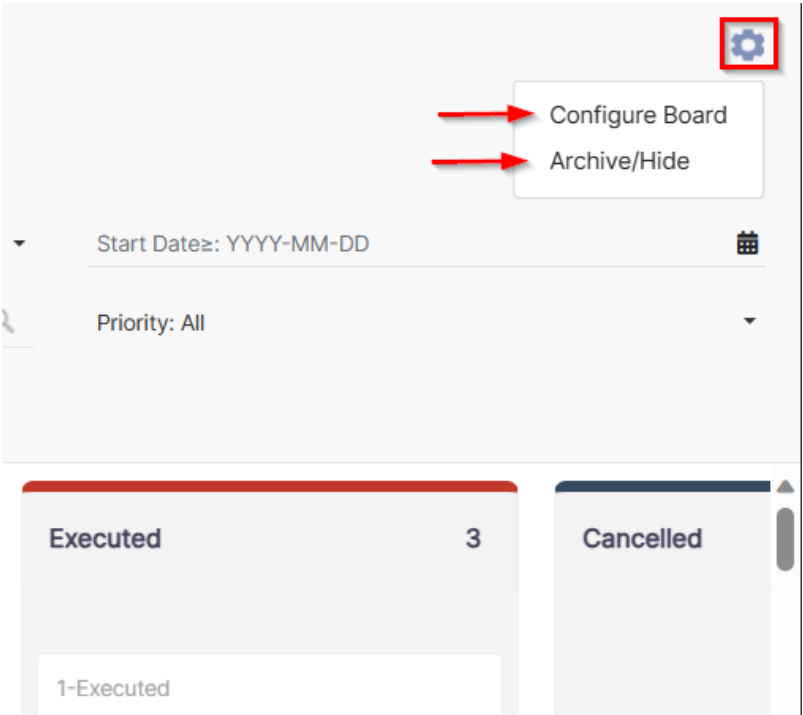
It is easy for managers to monitor the team's performance, the assigned person, priority, and due date as well.

Users can find information quickly using quick filters. They just need to click on the filter icon to enable them. The Board has quick filters for **Assigned Team, Assignee, Arrival Date, Filed on Date, Due Date**, and so on.

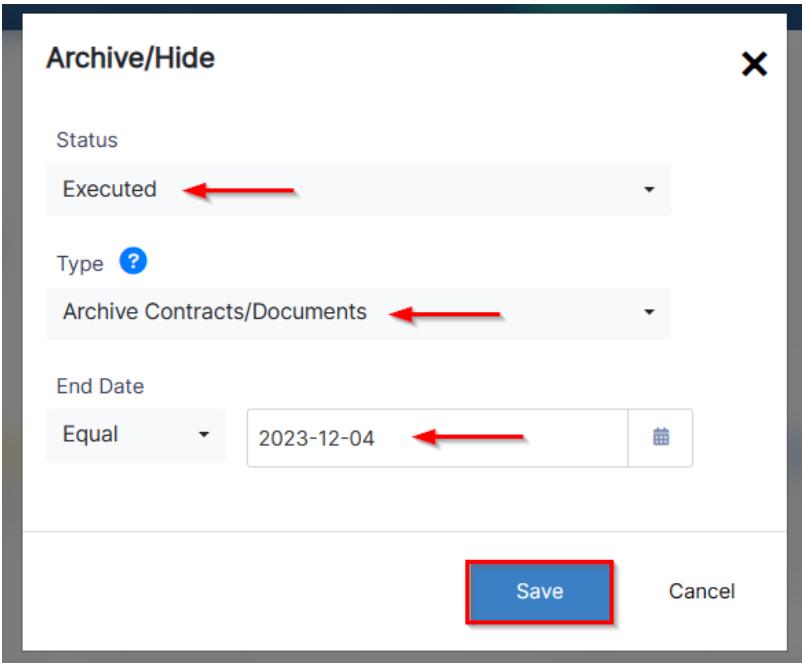
A Kanban board has great functionality that allows dragging tickets through columns in order to swiftly update the Status.


Changing the Status of the Contract strictly abides by the Contract Workflow defined in the Admin & Setup.

Columns that have 2 or more Statuses are divided so as to give a section to every Status.



Additionally, you can show the archived or hidden contracts as well. Choose the status, type, and close on date.



 By default, archived/hidden contracts will not show up on any boards.

Configure the Board:

You can also customize your Contract Boards to suit your specific needs. This way, you can set up the boards to display the information that is most relevant to you. For example, you can choose the columns that appear on the board, the labels that are used to categorize contract statuses and the filters that are used to narrow down the contracts that are displayed.

SettingsBoardsEdit Board

Board InformationPost Filters

Board Name\*Contracts Board

Save

Title:\*Drafting

Workflow Statuses :\*

Drafting x

Column Color :\*

Title:\*Under Review

Workflow Statuses :\*

Under Review x

Column Color :\*

Title:\*Approved

Workflow Statuses :\*

To be Approved xUnder Approval x

Column Color :\*

Title:\*Signed

Workflow Statuses :\*

Signature Step xSigned x

Column Color :\*

Title:\*Executed

Workflow Statuses :\*

1-Executed xExecution x

Column Color :\*

Title:\*Cancelled

Workflow Statuses :\*

Cancelled x

Column Color :\*

+

Add new column

Columns in the Matter Board can hold one or more Matter statuses and can be named as desired in an easily configurable interface.

You can create multiple boards that you need - just hit the **Board** link on the top and view the records of your boards, then add your own to that list.

Settings / Contracts/Documents BoardAdd New Board

List of Boards

Board Name	Number of Columns	Created By	Created On	Last Modified By	Last Modified On	Actions
Contracts Board	7	Carolina Robinson	2023-07-28 16:34:46	Jimmy Peterson	2023-12-06 15:55:09	<div><div></div><div></div><div></div></div>

From this page, you can view the boards, and edit or delete them. It can be accessible from the System Settings at any time.

Contract Boards also have post-filters that can be accessed using the filter-like shape.

Settings / Boards / Edit Board

Board InformationPost Filters

Post Filters

Name	Field	Operator	Value	
<div></div>	NDA	Type	Equal	Non-disclosure Agreement

You can create filters based on practice area, assignee, assigned teams, or priority.

Add New Post Filter

×

Name

Commercial

Field

Status

Operator

Equal

Value

Active

Save

Cancel

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!