

# How to Manage Contracts in Lexzur

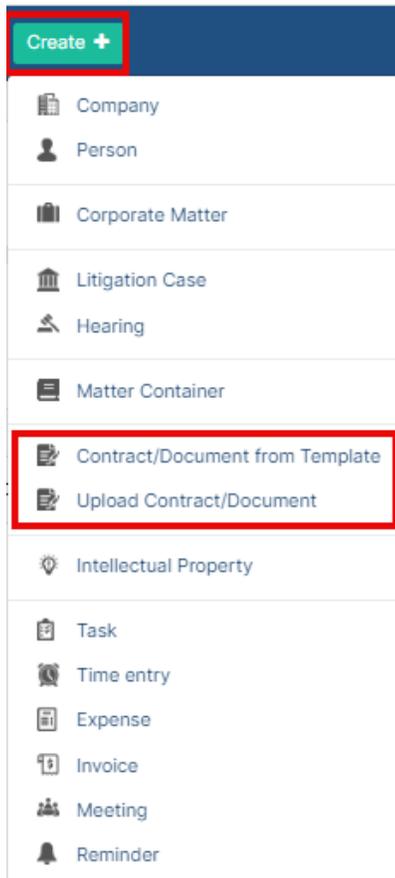
## Objectives

- Insert a contract/document in the database
- Correct/Revise/Update/Approve/Sign contracts

## Steps

In LEXZUR, you can easily and efficiently manage your contracts & documents.

First, you have to add contracts/documents to your database. You do that quickly from the **Create** button in the main menu.



We have two options to generate a contract/document:

1. Create a contract/document from Template
2. Upload Contract/Document

 Learn more about how to generate a new contract [here](#).

You can click on the Contract name or Contract ID to open its page and edit or capture more information. You can capture information regarding Contract details, dates, people, and notes.

CT157 - Brandy Translation Purchase Agreement

Cancelled Executed Under Approval more Active

**Details**

Type: **Purchase Agreement** Workflow Status: **Filing & Drafting** (System Workflow (default))

Sub type: **None** Priority: **Medium**

Value: **10000.00** Currency: **None**

Country: **Australia** Reference#: **PA25639**

Applicable Law: **None** Client: **None**

Amendment of: **None**

**Parties**

Party (1): **Common Law** Category (1): **None**

Party (2): **Brandy Translation** Category (2): **None**

**Description**

**Notes**

**People** Zoom Meet Now

**Dates**

Date: 2022-12-09

Renewal:

Start Date: 2023-01-01

End Date: 2023-12-31

Created On: 2022-12-19 11:59:02

Modified On: 2023-01-13 16:47:25

**Notifications**

Notify me before:

Notify Users:

Notify Teams:

**Privacy**

You can also create and manage the Folder structure and Upload Documents through the **Attachments** Tab. The LEXZUR Editor is an efficient tool to help you manage document versions related to a specific contract.

PUA-368 - Purchase Agreement between ABC and ... Public

Approved Closed Executed More Active

**Attachments**

Lexzur Documents Google Drive OneDrive Dropbox

Download Rename Open in Move Copy To Share with List versions Hide from Client Portal Convert to PDF

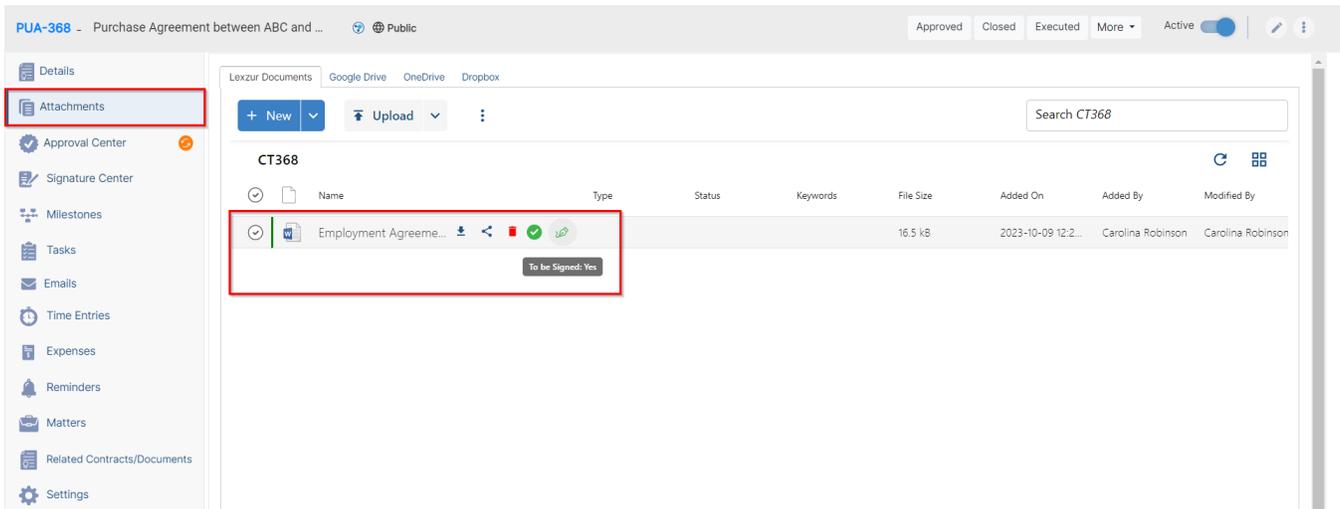
Delete

Word for the web

Lexzur Editor

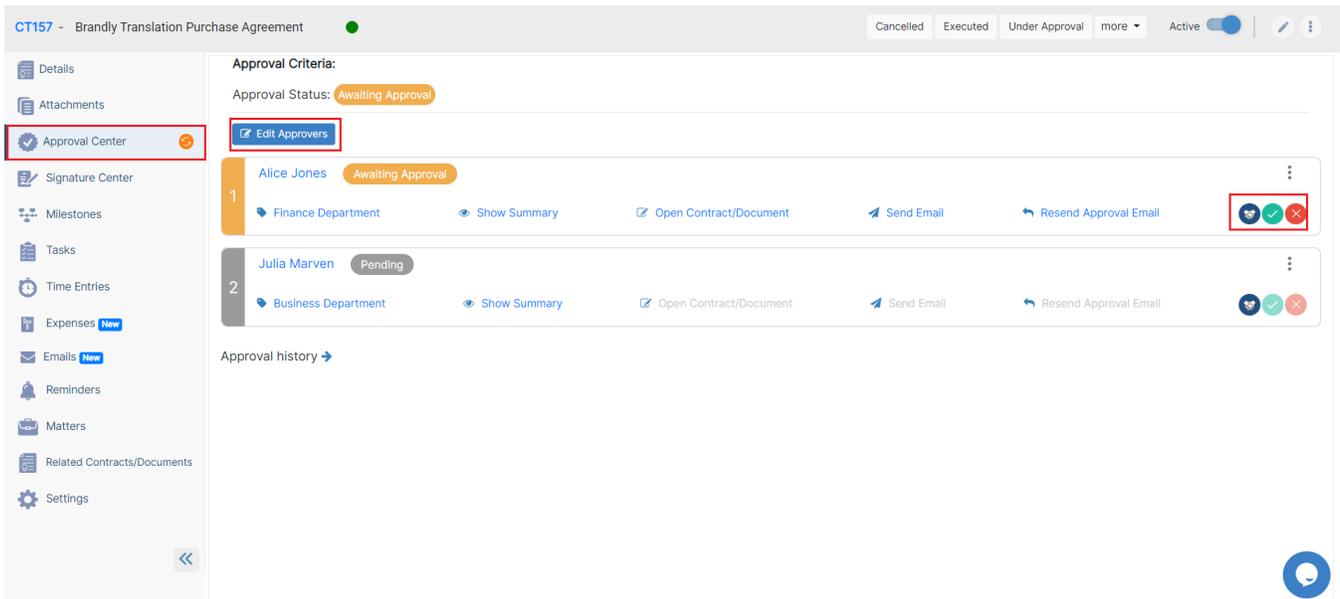
Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
Employment Agreement template.docx				16.5 kB	2023-10-09 12:...	Carolina Robins...	Carolina Robins...

Once done, make sure to change the "To Be Approved" and "To Be Signed" options to "yes" so that your contract is now ready for approval and signature.



The next step is to identify the list of approvers and signees. This can be done manually from the **Approval Center** and **Signature Center**. However, the list of approvers and signees can be configured based on predefined business rules from the Legal Team.

The Approvers can start a negotiation, and approve or reject the contract.



Once the contract is approved by everyone, it should be signed. The list of signees could use DocuSign, Adobe Signature, or other signature workflow. Once signed, the contract is saved and can be retrieved easily.

PUA-368 - Purchase Agreement between ABC and ... Public

Approved Closed Executed More Active

- Details
- Attachments
- Approval Center
- Signature Center**
- Milestones
- Tasks
- Emails
- Time Entries
- Expenses
- Reminders
- Matters
- Related Contracts/Documents
- Settings

Please Specify the Signature Workflow

**LEXZUR**

Lexzur Sign

Allows signing using Lexzur or DocuSign

Get Started

**Adobe Sign**

Adobe Sign

Restricts all signatures to Adobe Sign

Get Started

**emdha**

Emdha

Restricts all signatures to Emdha

Get Started

**LEXZUR**

Lexzur Sign Powered by Adobe Acrobat

Restricts all signatures to Lexzur Sign

Get Started

**sirar by sic**

Sayen

Restricts all signatures to Sayen

Get Started

Another important feature available in Contra is the **Milestones** which will help you log the milestones and deliverables of every contract. There are also two workflows for every milestone: a general one and a financial one.

CT115 - Non-Disclosure Agreement Amanda Julin

Cancelled Executed Filing & Drafting more Active

- Details
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- Signature Center
- Milestones**
- Tasks
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Milestones Show in Client Portal Add Milestone

Title	Start date	October 2022																															Novem...	
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2
Submission o...	2022-10-14																																	

Milestones

Submission of All Remaining Data files In Progress Financial Status

**1**

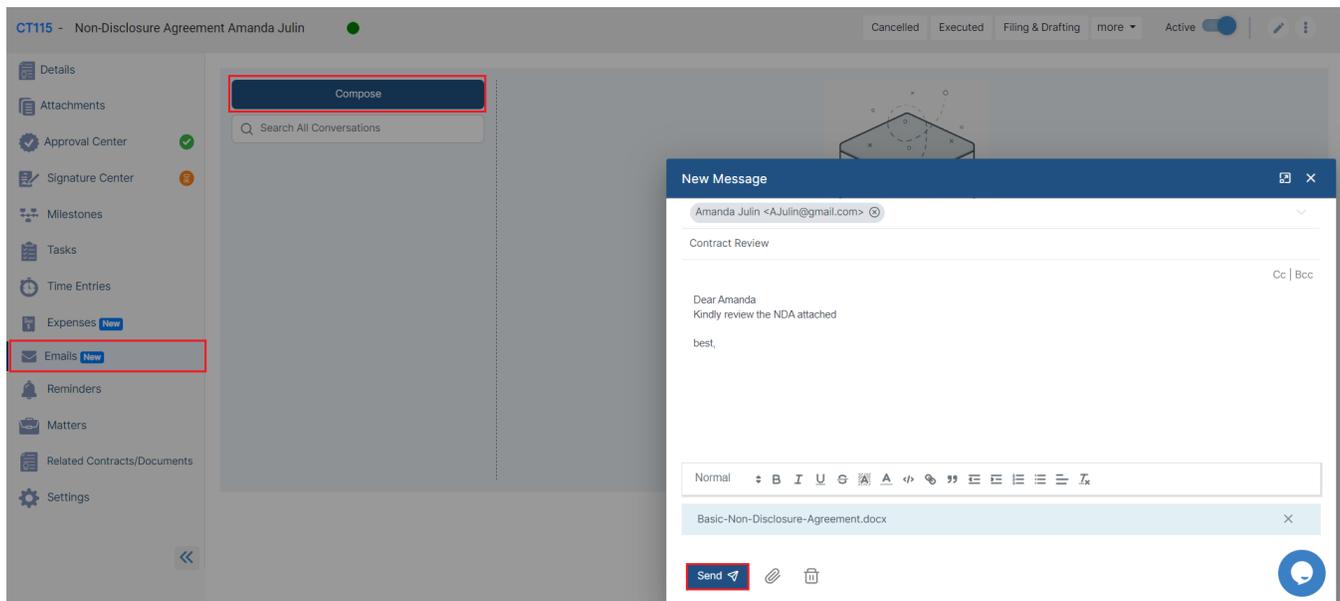
- Amount: 200 USD
- Serial Number: None
- Attachments: 0 Document(s)
- Deliverables: None

Start Date: 14-10-2022  
Due Date: 18-10-2022

In addition to the above, there is a task tool where task management is smooth and intuitive when several people are working in parallel on the same object.

Moreover, you can log time, add expenses, and set all the reminders related to this contract, and the concerned people will receive notifications before the due date.

Furthermore, you can now send your contracts by **Email** and track all the related email conversations.



Last but not least, any given Contract could be linked to an existing Matter or litigation Case and it also could be associated with an existing contract.

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

Thank you!