

How to Manage Contracts in Lexzur

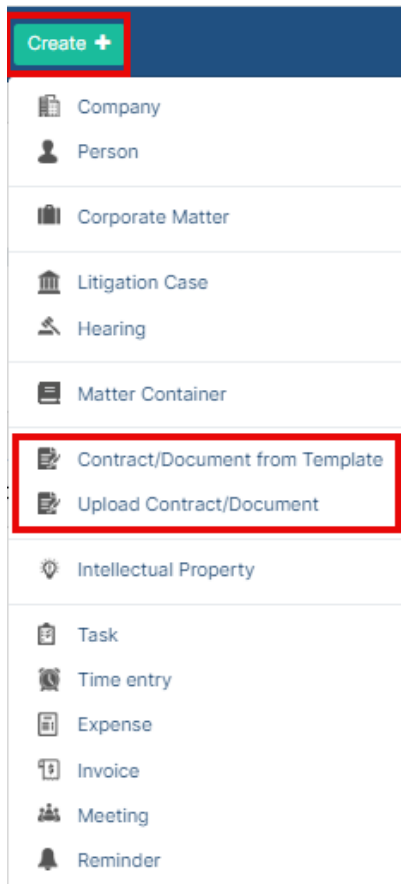
Objectives

- 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

1 Selected

CT368

Word for the web

Lexzur Editor

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
Employment Agreement template.docx	Word			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.

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

Lexzur Documents Google Drive OneDrive Dropbox

+ New Upload

Search CT368

CT368

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
	Employment Agreeeme...				16.5 kB	2023-10-09 12:2...	Carolina Robinson	Carolina Robinson

To be Signed: Yes

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.

CT157 - Brandy Translation Purchase Agreement

Cancelled Executed Under Approval more Active

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses **New**

Emails **New**

Reminders

Matters

Related Contracts/Documents

Settings

Approval Criteria:

Approval Status: **Awaiting Approval**

Edit Approvers

1 Alice Jones **Awaiting Approval**

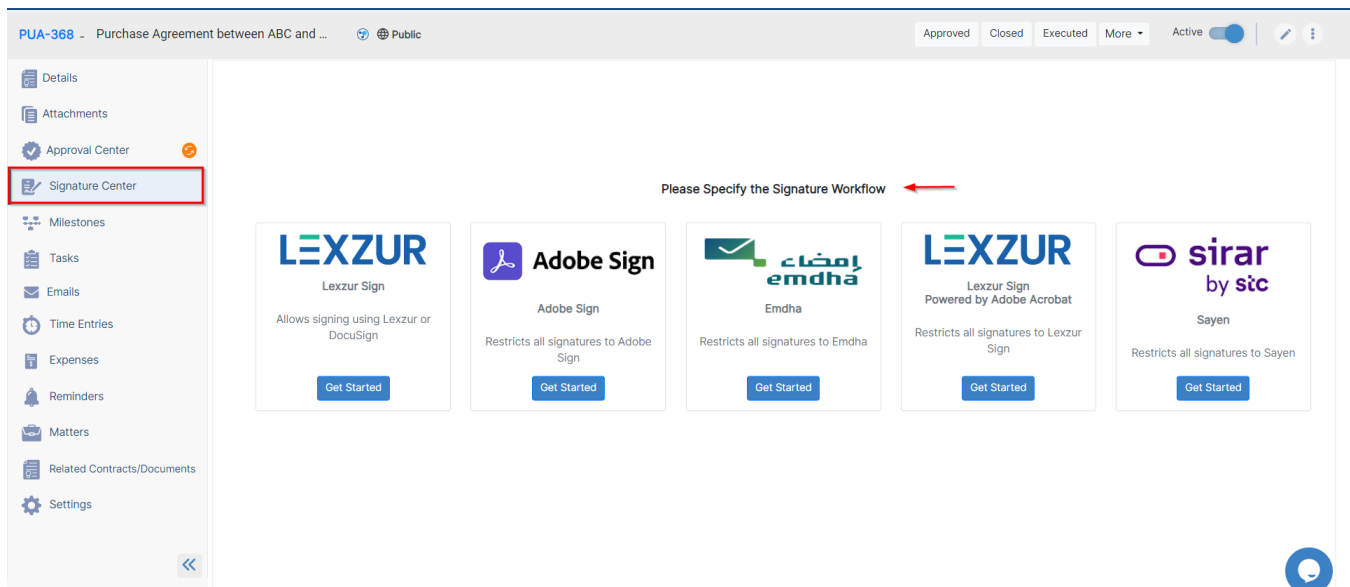
Finance Department Show Summary Open Contract/Document Send Email Resend Approval Email

2 Julia Marven **Pending**

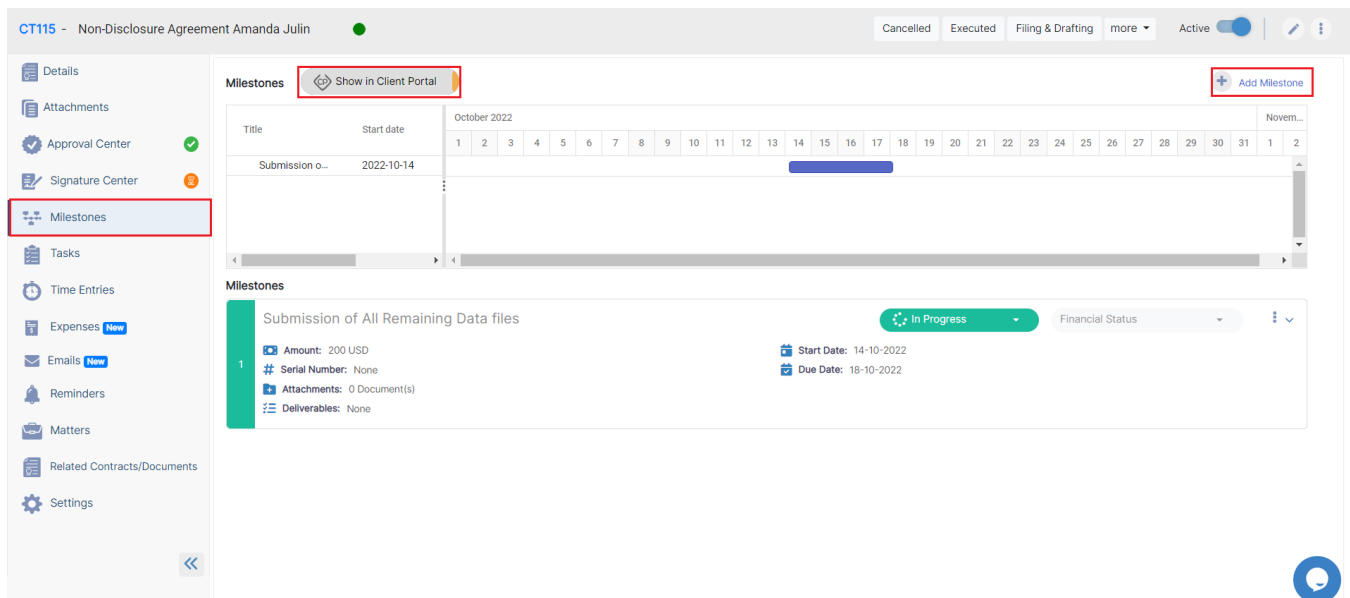
Business Department Show Summary Open Contract/Document Send Email Resend Approval Email

Approval history →

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.



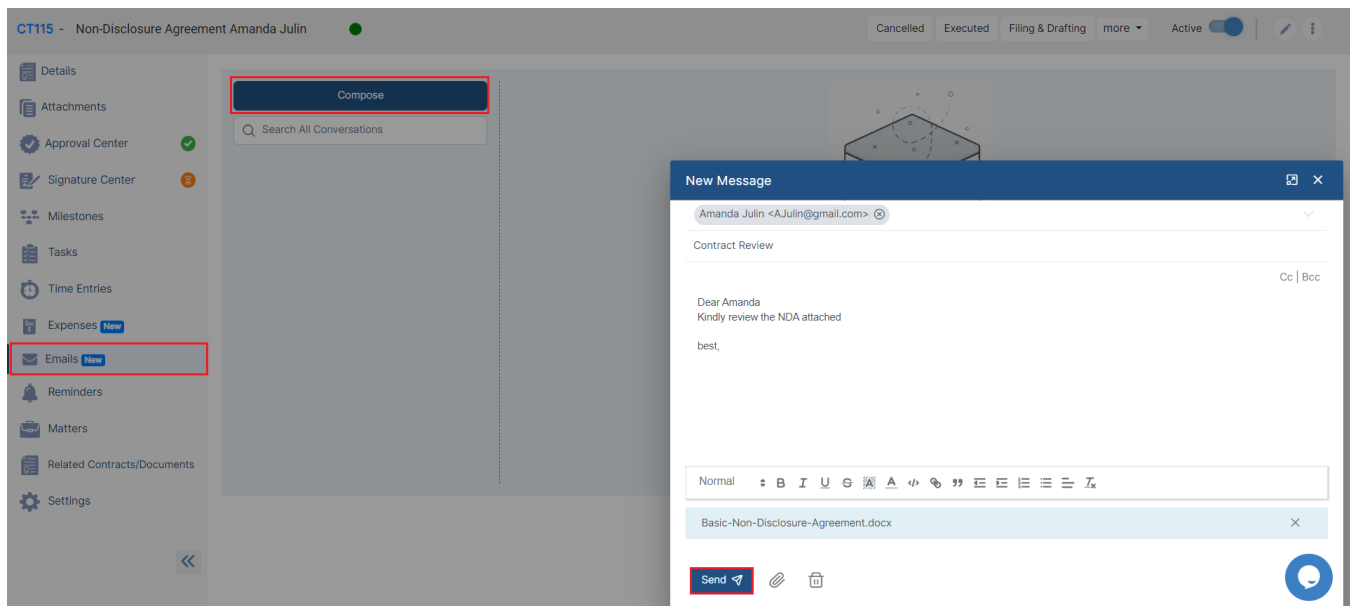
Another important feature available in Contra is the **Milestones** which will help you log the milestones and deliverables of every contract. There are also two workflows for every milestone: a general one and a financial one.



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.

Thank you!