How to Create Contra Predefined Templates

Objectives

- Create a Template Word Document.
- Create a Questionnaire in the system.

Steps

LEXZUR allows you to generate contracts based on your own templates by automating fields to fill out forms automatically.

To add a new questionnaire from a template you must follow some steps:

- Create a template Word document, that includes all your constant contract details, and distinguish the variables using special characters, for example, the **${..}**. These variables will be filled out when adding a new contract from the system.
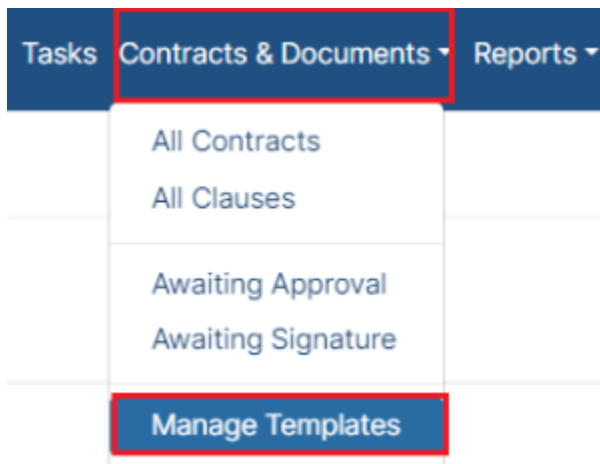
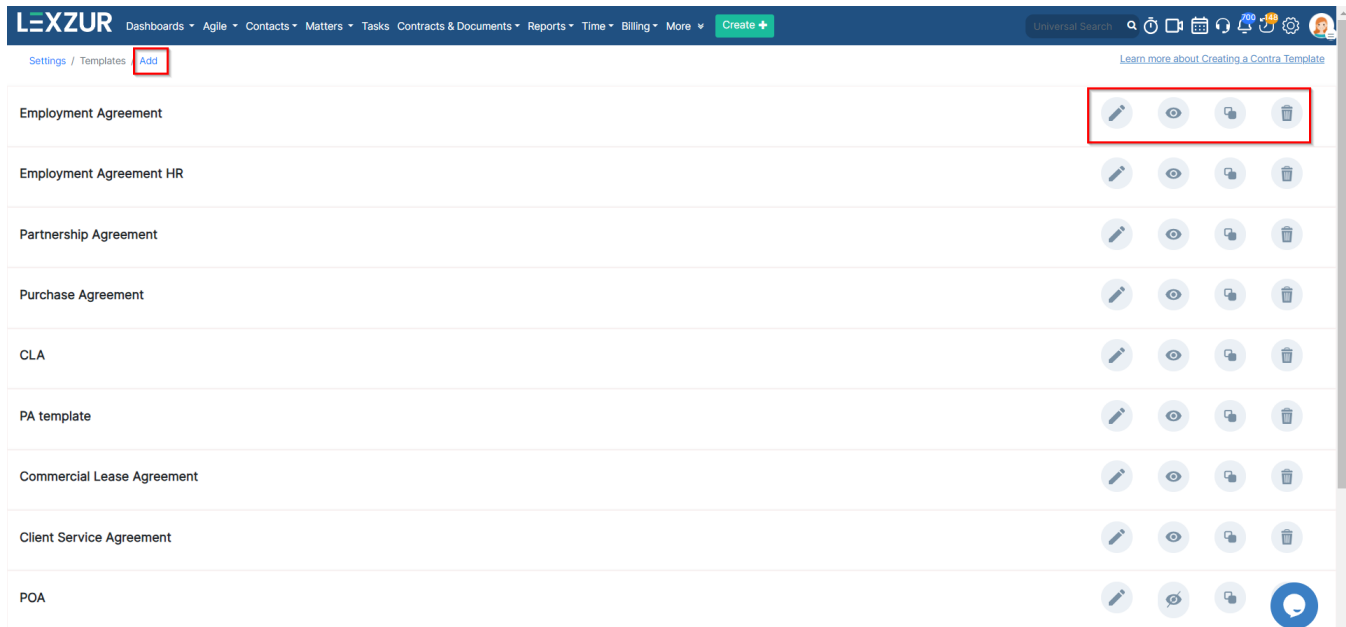> ✅ You can use LEXZUR Word Add-on to create a template document. Learn more **here**.
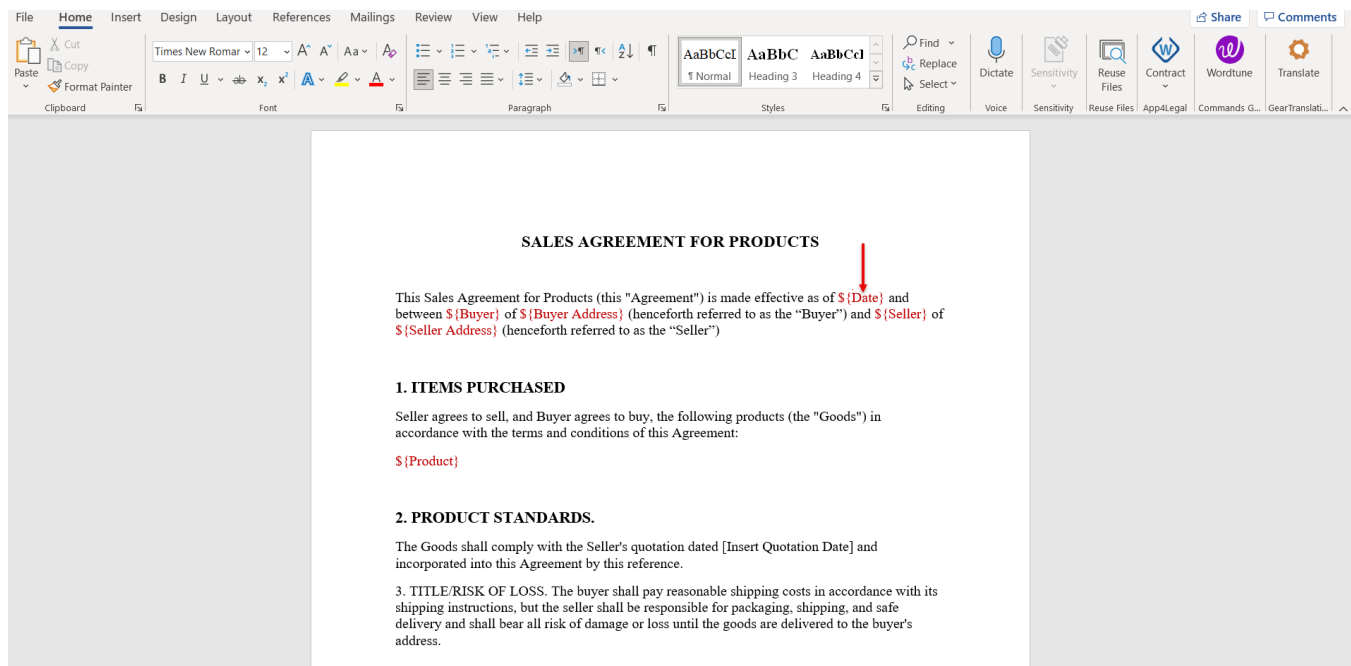
- Add a new Template in the system.

  Therefore, click the **Contracts & Documents** dropdown list in the Navigation menu and choose **Manage Templates.**

From this page, you can add new, edit, hide/show in Client Portal, clone, or delete contract templates.

To add a new questionnaire you must:

1. Give this Template a **Name**
2. Choose the **Type** of contract.
3. **Upload** the contract template document, generated in the first step.
4. (optional) You can also upload any **supporting documents** related to your contract.

Templates are added based on the contract area of practice, so you can add templates for each contract type.

Now move to the **Template Content** and start creating your questionnaire:

> ℹ️ Each template can have multiple pages, groups, and variables. These are the variables that will change whenever a new contract is created from this template.

You can easily add pages, groups, or variables from the **plus** sign next to each item.

Enter the title of the pages of the questionnaire, the page description if needed, and name the groups as well.

> ℹ️ Within each group, you can add multiple variables.

The first variable will be the Date for example.

> ⚠️ The name should be written the same as in the document you uploaded.

When adding a variable you need to specify:

- Name: Name of the variable
- Question: The question that will help the user to understand the variable field in the contract questionnaire
- Type: it could be either a System variable or a Document Variable
- Mapped-to Field / Field Type: link the type to one of the fields of the contact's metadata if it's a system variable, or specify the field type otherwise.
- Add a variable description and specify whether it is required.

> ℹ️ System variable means that it's mapped to one of the fields in the system, and document variable, means it could be single text, date, list, etc.

Variables

Document variables could be single text, text box, date, list, checkboxes, radio buttons, image, or table.

Similarly, add the other variables.

Repeat the process depending on the contract's pages and the number of input variables and once done, click on save.

The questionnaire has now been created and it can be used in the creation of a contract from a template of the selectable type. Learn more here.

> ⚠️ The Supporting Documents uploaded in the contract template will be then visible to the users upon creating the contract for their reference so that they can click to download it and review it before filling out the questionnaire.

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

Thank you!