

How to Create Contra Template using the Word Add-on

Objectives

- Create Contra predefined templates using the Word Add-on

Steps

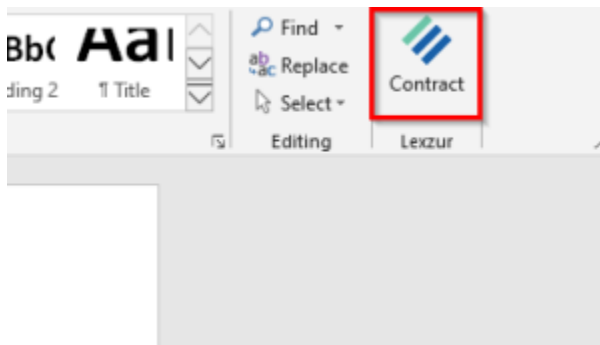
LEXZUR word add-on allows you to easily create and upload document templates to improve efficiency and increase productivity.



You should first Get the Add-on from the Office store and Connect Word to LEXZUR before using it. [Learn more here.](#)

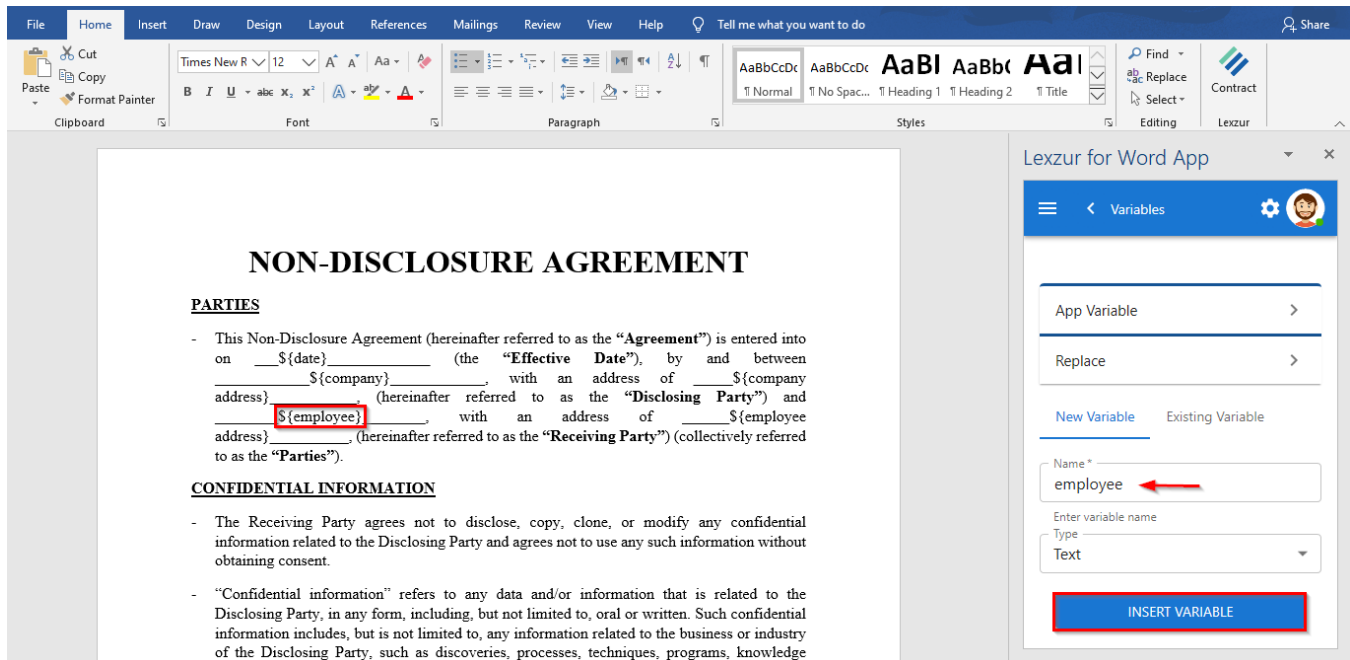
To create a predefined template, you must do the following:

- Prepare your contract document, the Word document you want to use to create the template.
- Open LEXZUR for Word and choose **Variable**.



Now start adding your variables.

The variables are the fields that will be filled in by the user later on when filling out the questionnaire.



- Place the cursor in your document where you want the variable to be inserted, then from the Word Addon page, give this variable a name, type, and press Insert Variable.

The variable is added to your document with special characters to be readable by the system. You can customize these characters from the App Variable option, specify the start and end characters, and update your changes.

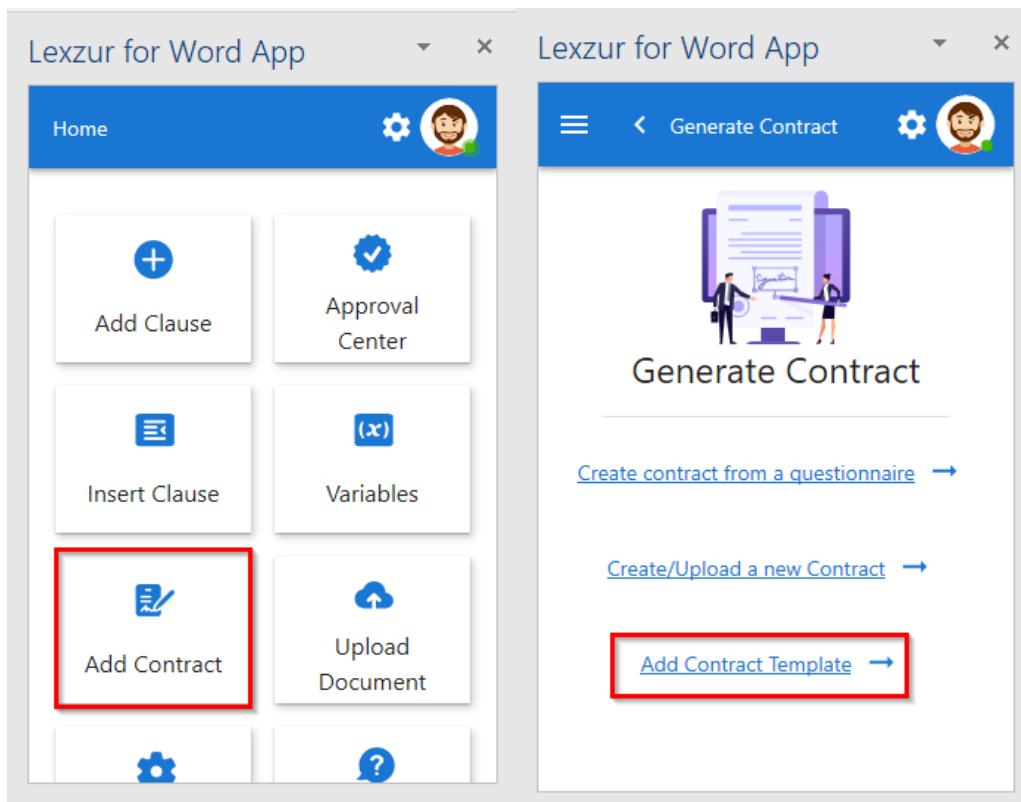
The screenshot shows a Microsoft Word document titled "NON-DISCLOSURE AGREEMENT". The document contains two sections: "PARTIES" and "CONFIDENTIAL INFORMATION". The "PARTIES" section includes a paragraph with variables like `{date}`, `{company}`, and `{employee}`. The "CONFIDENTIAL INFORMATION" section includes a paragraph with variables like `{date}` and `{company}`. On the right side, the "Lexzur for Word App" interface is visible, showing the "Variables" tab. The "App Variable" section is highlighted with a red box, showing the variable name `{date}` and the "UPDATE" button. Below it, the "Replace" section shows the variable name `employee`.

All the variables could be then listed in the Existing Variable tab so that you can choose to add them again within the document.

The screenshot shows the "Lexzur for Word App" interface with the "Existing Variable" tab selected. The "App Variable" section shows the variable name `{date}` and the "UPDATE" button. Below it, the "Replace" section shows the variable name `employee`. The "Existing Variable" tab is active, displaying a list of variables: `date`, `company`, `company address`, `employee`, and `employee address`.

Once your document is ready with all the variables, start building your questionnaire.

- From the LEXZUR for Word side menu, choose **Add Contract Add Contract Template**



⚠ Add Contract Template is the same process as configuring templates in the system, with Pages, Groups, and Variables, but in this case, the document you are generating will be your reference template.

- First, you must specify the template name and contract type.

Lexzur for Word App

Create Contract Tem...

Template Name *

NDA Template

Types *

Non-Disclosure Agreement

Sub type

None

NEXT



Each template can have multiple pages, groups, and variables. Where each page is divided into groups. Within each group, you can add multiple variables.

- Enter the title of the first page and a description if needed. Then, specify the Group title, and start adding variables.

The image displays two side-by-side screenshots of the 'Lexzur for Word App' interface, specifically the 'Create Contract Template' screen. Both screenshots show a hierarchical structure with 'Page 1' and 'Group 1'.

Left Screenshot:

- Page 1:** Agreement Details (with a plus icon and dropdown arrow).
- Group 1:** (with a plus icon and dropdown arrow).
- Variable 1:** (with a plus icon and dropdown arrow).
- Page 1 Section:** Contains a 'Page Title *' field with the text 'Agreement Details' (indicated by a red arrow) and a 'Page Description' field.
- SAVE** button at the bottom.

Right Screenshot:

- Page 1:** Agreement Details (with a plus icon and dropdown arrow).
- Group 1:** Terms and Conditions (with a plus icon and dropdown arrow; the plus icon is highlighted with a red box).
- Variable 1:** (with a plus icon and dropdown arrow).
- Group 1 Section:** Contains a 'Group Title *' field with the text 'Terms and Conditions' (indicated by a red arrow).
- SAVE** button at the bottom.

Use the plus sign to add multiple pages, and groups and to add variables inside each group.

- For each variable, you must enter its name which should be the same as in the document you are working on.

Variable 1

Name*
Date

Question*
Insert the Agreement Date:

Type*
System Variable

Mapped-to Field*
Date

Description

☒ Required

SAVE

Variable 1

Name*
Date

Question*
Insert the Agreement Date:

Type*
System Variable

Mapped-to Field*
Date

Description

Assigned Team

Assignee

Priority

Date

The question part is a variable definition used to make it easy for users to fill out the questionnaire.

The Variables within the template could be either a system variable, which means that it is mapped to one of the fields within the system, or a document variable and in this case, you have to choose a field type such as single text, date, list, and so on.

You can add a variable description and specify if it is required or not.

Variables could be an existing variable that you have added from the add-on.

Page 1 Agreement Details

Group 1 Terms and Conditions

Variable 1 Date

Variable 1

Name *

Date

Disclosing Party

D-address

Receiving Party

R-address

SAVE

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

A new Questionnaire is now created in the system, you can now use it when adding a new contract.

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

Thank you!