

How to Create Contra Predefined Forms

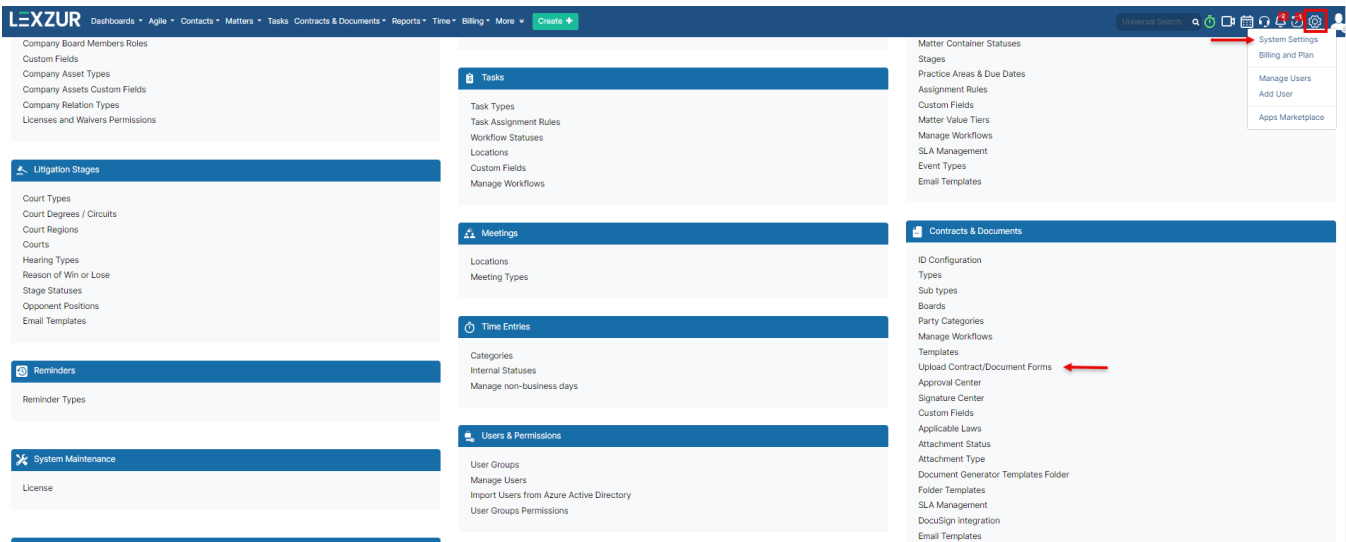
Objectives

- Add predefined forms for the "upload Contract/Document" method

Steps

The "Upload Document/Contract" is a dynamic form also based on a Template of Questionnaires, you can choose the fields/custom fields that you want to appear in the form and in multiple pages.

To create a new form you must first go to the **System Settings Contracts & Documents Upload Contract/Document Forms**



From this page you can view the list of your predefined forms, clone, edit, delete, or add a new one.

 There is a Default Form by the system to be used while uploading contracts in case you haven't created your own Form

Settings / Upload Contract/Document Forms / Add	
Default Form	 
NDA	  
Purchase Agreements	  

Adding a new form requires filling out some fields:

- **Document Form Name:** Give this Form a name
- **Type:** Specify the Type of Contracts related to the created form.
- **Page Titles:** You can create as many pages as needed.

Each page can contain multiple fields

< Edit Document Form

Document Form Name *
Employment Contract

Apply This Form for all Contracts/Documents having:

Type *
General employment contract

Sub type
None

Page 1 X

Page 2 X

+ Add Page

Page Title *
General Info

Field	Display Name	Required	Description	Visible	Default Value	Actions
Date	Date	☒	short hint on the field	☒		
Name	Name	☒	short hint on the field	☐	Employment	

+ Add Field

You can include any field (system fields or custom fields) in addition to collaborator field when configuring contract forms.

< Edit Document Form

Document Form Name *
Employment Contract

Apply This Form for all Contracts/Documents having:

Type *
General employment contract

Sub type
None

Page 1 X

Page 2 X

+ Add Page

Page Title *
General Info

Field	Display Name	Required	Description	Visible	Default Value	Actions
Date	Date	☒	short hint on the field	☒		
Name	Name	☒	short hint on the field	☒		
Collaborators	Collaborators	☒	short hint on the field	☐	Adam Christopher	

+ Add Field

So, choose the fields you want, give them a display name, add a description when needed, and specify the required fields and the ones you wish to show or hide from the form as well.



For the hidden fields, you must predefine the default value.

Repeat the process for all the pages. Then save your changes.

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

Thank you!