How to Configure Contra ID

Objectives

• Configure Contract's ID number

Steps

The Contra ID configuration can be done from the Contracts Settings, therefore go to the System Settings Contracts & Documents ID Configuration

LEXZUR Dashboards * Agile * Contacts * Matters * Tasks Contracts & Documents * Reports *	Fime * Billing * More v Create +	Universal Search 🔍 Ŏ 🗖	🛱 n 🗳 🔊 🔔
Company Board Members Roles Custom Fields Company Asset Types Company Assets Custom Fields Company Relation Types Licenses and Waivers Permissions		Matter Container Statuses Stages Practice Areas & Due Dates Assignment Rules Custom Fields Matter Value Tens Manage Workflows	System Settings Billing and Plan Manage Users Add User Apps Marketplace
Litigation Stages Court Types Court Types Court Dennes Climitis	Locations Custom Fields Manage Workflows	SLA Management Event Types Email Templates	
Court Regions Courts Hearing Types Reason of Win or Lose Stage Statuses Oppomer Positions Email Templates	Locations Meeting Types	Contracts & Documents D Configuration Types Sub types Boards Party Categories Management	
Reminders Reminder Types	Categories Internal Statuses Manage non-business days	Uppage terminete Templates Uppage Contract/Document Forms Approval Center Signature Center Custom Fields	
¥ System Maintenance License	User S Permissions User Groups Manage Users Inport Users from Azire Active Directory User Groups Permissions	rupprovem kans Attachment Tstatus Attachment Type Document Generator Templates Folder Folder Templates SLA Management Docusijen integration	
		Email Templates	

The ID In Contra is composed of 4 sections :

- First ID Section: The Contract Type Prefix i.e. The abbreviation of the contract type (for example Commercial Lease Agreement might be CLA).
- Second ID Section: Use any keyword or abbreviation that will allow you to locate this contract/document later.
- Third ID Section: This section will be used if you want to add the date to your contract. YYYYMMDD is the default format.
- The Forth Section is the number auto-generated by the system.

The Cont Only 5 ch	ract Type Pre aracters are a	fix can be edited from the allowed in the Second ID	e Types Page. Section, and the Default keywo	ord is CT	
Settings / ID Configuration Configure Contract/E	Document IDs by e	enabling or disabling the below I	ID sections 😧		
First ID Section : Second ID Section : Third ID Section :	••• •• •• ••	CT YYYYMMDD •		COA - CT - 20230504 - 1234	
Save					

The first 3 sections can be enabled/disabled on the ID Configuration page in the settings as needed.

The enabled sections will only appear in the Contract ID. So, the ID of the Contract now will look like this if all the sections are enabled:

Con	tracts & Documents	All	✓ Save as					🖹 Export 👻	🌣 Tools 👻	
1 - 20 c	f 158 items 🖒					Search		Q Advanced	Columns 🝷	
	ID	Name	Value	Туре	Currency	#	Status	Workflow	/ Status	Date
	COA-CT-20230504-261	App4Legal - M202-New Matter: Partnership Agreement Consultation	0.00	Consultancy Agreement		261	Active	Filing &	Drafting	202
	PAA-CT-20230504-260	App4Legal - M202-New Matter: Partnership Agreement Consultation	0.00	Partnership Agreement		260	Active	Filing &	Drafting	202
	PAA-CT-20230504-259	Partnership Agreement	0.00	Partnership Agreement		259	Active	Filing &	Drafting	202
	PAA-CT-20230504-258	Partnership Agreement BLP	0.00	Partnership Agreement		258	Active	Filing &	Drafting	202
	SPA-CT-20230428-254	Purchase Agreement	0.00	Stock Purchase Agreement		254	Active	Filing &	Drafting	202

To edit the Contract Type Prefix, go to the Types within the Contracts Settings

LEXZUR Dashboards - Agile - Contacts - Matters - Tasks Co	ontracts & Documents + Reports + Time + Billing + More + Create +		ersal Search 🛛 a 🝈 🗗 🛗 🕥 🖉 🙆 🔎			
Company Board Members Roles		Matter Container Statuses	System Settings			
Custom Fields		Stages	Billing and Plan			
Company Asset Types	A Tasks	Practice Areas & Due Dates	Magazo Urorr			
Company Assets Custom Fields		Assignment Rules	Add Lloor			
Company Relation Types	Task Types	Custom Fields	Add Oser			
Licenses and Walvers Permissions	Task Assignment Rules	Matter Value Tiers	Apps Marketplace			
	Workflow Statuses	Manage Workflows				
	Locations	SLA Management				
A Litination States	Custom Fields	Event Types				
Tr children ordiges	Manage Workflows	Email Templates				
Court Types						
Court Degrees / Circuits						
Court Regions	A Martin	Contracte & Documente				
Courts	<u>21</u> Meetings					
Hearing Types	Locations	ID Configuration				
Reason of Win or Lose	Masting Tunas	Types				
Stage Statuses	weeting types	Sub types				
Opponent Positions		Boards				
Email Templates		Party Categories				
	O Time Entries	Manage Workflows	Manage Workflows			
	Output la	Templates				
Durals days	Categories	Upload Contract/Document Forms				
3 Reminders	Internal statuses	Approval Center				
Deminder Types	Manage non-business days	Signature Center				
Hummour Types		Custom Fields				
		Applicable Laws				
	🚊 Users & Permissions	Attachment Status				
System Maintenance		Attachment Type				
	User Groups	Document Generator Templates Folder				
License	Manage Users	Folder Templates				
	Import Users from Azure Active Directory	Import Users from Azure Active Directory SLA Management				
	User Groups Permissions	DocuSign integration				
		Email Templates				

You will find on this page all your contract types and their prefixes, where you can edit them easily.

Settings / Type / Add							
			Choose Default Languages 🝷 🔅				
Total Records: 22		ļ					
Type (english)	Prefix 😯	Edit	Delete				
Joint Venture Agreement	JVA	C	۵.				
Distribution Agreement	DIA	C	۵. ش				
Non-compete Agreement	NCA	6	۵.				
Non-disclosure Agreement	NDA		ŵ				
Partnership Agreement	PAA	C	D				
Reselling Agreement	REA	C	D				
Commercial Lease Agreement	CLA	C	D				
Purchase Agreement	PUA	C	۲ ۵				
Stock Purchase Agreement	SPA	C	D				
Consultancy Agreement	COA	Ø	ŵ				

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

Thank you!