How to Create Contra Folder Template
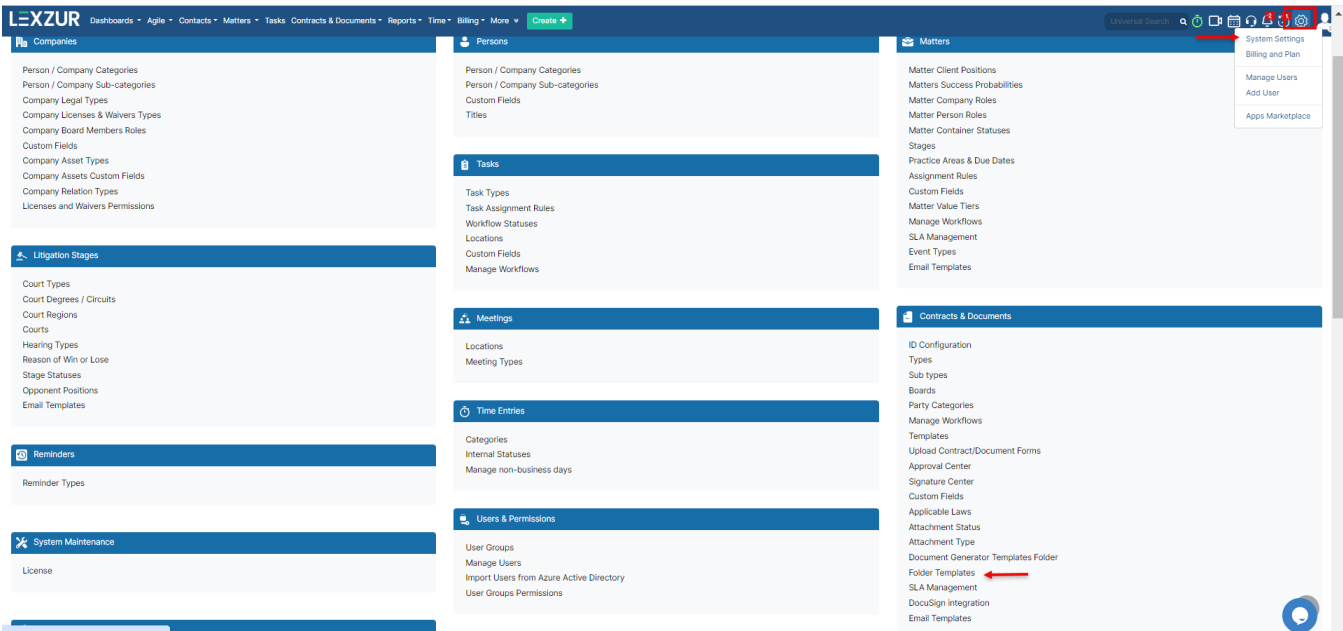
Objectives

- Automate the creation of contract folders.

Steps

Simplify your workflow by automating folder creation for contracts based on types. With this feature, every time you create a new contract, the system will automatically generate corresponding folders tailored to the Type of Contract you've chosen.

To do so, navigate to the **System Settings Contracts & Documents Folder Templates**

Here you can predefine your own contract folders based on selected type of contract. You can edit or delete any previously defined templates as well.

Choose the types of contracts that the new template will be applied to, such as Consultancy Agreements, Non-Disclosure Agreements, and so on. You can select all contract types as well.

Add Folder Template

Type *

Consultancy Agreement ×

Clear   **Select All**

Folder Templates ? *

Expand All / Collapse All
　　└ 📁 Related Documents
　　　　　Create

Save

You can create, rename, delete, and edit folders by using the mouse right-click option:

Add Folder Template

Type *

Consultancy Agreement ×

Clear   **Select All**

Folder Templates ? *

Expand All / Collapse All
　　└ 📁 Related Documents
　　　　　├ 📁 Legal Attachments
　　　　　└ 📁 Reviewed Agreements

Save

Now, once you generate a new contract the system will automatically create corresponding folders tailored to the type you've chosen.

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

Thank you!