How to Generate a Contract/Document
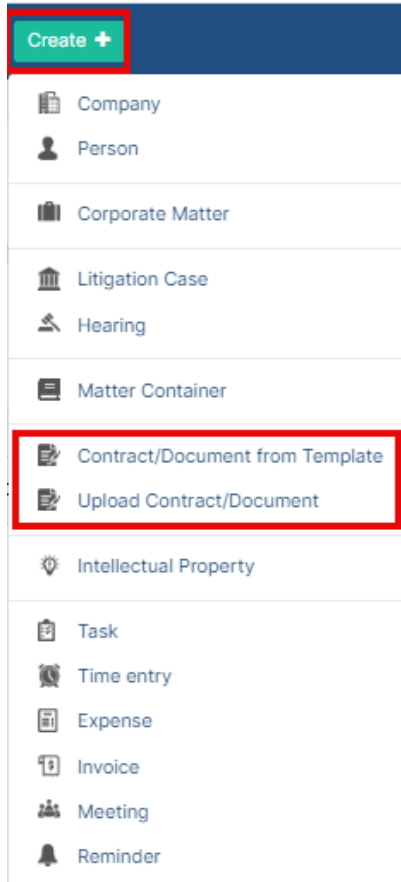
Objectives

- Create Contract from template
- Upload Contracts/Documents

Steps

To add a new contract/document, click on the quick **Create** button in the main menu.

We have two options to generate a contract:

1. Create a contract/document from Template
2. Upload a new Contract/document

- If you choose "**Contract/Document from Template**", you will be redirected to a page where you have to choose the type of contract and choose a template based on this contract type.

Generate Contract/Document

Type*

General employment contract

Sub type

None

Choose template*

Employment Agreement →

Document Name

| | 20221013151421.docx |

Next › 🔔   Cancel

On the following page, give this contract a name, and start filling in the questionnaire.

✓ These templates could be configured from the settings. Learn how to create the predefined templates **here**.

Generate Contract/Document

Name*

Page 1
General Info

Enter Contract Date*

YYYY-MM-DD

Insert Employee Name*

Company / Group

undefined

Insert Employer Name*

Company / Group

undefined

‹ Previous   Next ›   🔔   Cancel

The number of these variables and pages depends on the type of agreement and its related template.

Once done, you will be directed to the page of the contract you've created where you can take further actions.

- If you choose "**Upload Contract/Document**":

The information that needs to be filled out here could also be referred to a predefined form.

So, specify your **Document Type, Sub Type** if any, and choose the predefined **Form.**

And upload your contract/document as well.

Upload Contract/Document

Add Contract/Document Info

Document Type*   Document Sub Type   Form*   Add New Form →

Non-disclosure Agreement   Choose Document Sub-type   Default Form

Drop files here to upload

🔘 Send Notification by email   Next ›

⚠ There is a Default Form that could be used in case you haven't created your own form.

⚠️

After adding your document, you can set the approval and signature permissions on the fly.

Upload Contract/Document

Add Contract/Document Info

Document Type*   Document Sub Type   Form*   Add New Form →

Non-disclosure Agreement   Choose Document Sub-type   NDA

📄 NDA-Lauren Travis20230302153822.docx   ✅ To Be Approved: Yes ✅ To Be Signed: Yes ❌

Drop files here to upload

🔘 Send Notification by email   Next >

Now, start adding the contract information, such as the Contract Name, Parties with their categories, Contract Type, Requester, Date, and so on.

The number of these variables and pages depends on the type of agreement and its related form.

✅ Learn more about how to create Forms **here**.

Upload Contract/Document

1
Page 1   ⬅

Page 1
Name*

Requester

Date
YYYY-MM-DD   📅

🔘 Send Notification by email   < Back   💾 Save

Once done, you will be directed to the page of the contract you've created where you can take further actions.

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

Thank you!

⚠️