How to Manage the Folder Structure Related to a Contract

Objectives

- Create Folders and upload attachments
- View, edit, and manage attachments
- Share files and folders, and track version history

Steps

Attachments related to contracts will be uploaded under the Attachments tab. These attachments may include agreements, contracts, non-disclosure agreements, etc...

You can either drag-and-drop or you can upload or generate new Files and Folders.

Attachments can be arranged in folders. Privacy can also be applied to a folder and the privileged user can control with whom to share the file.

Files and Folders can be categorized by Type, Status, and Keywords.
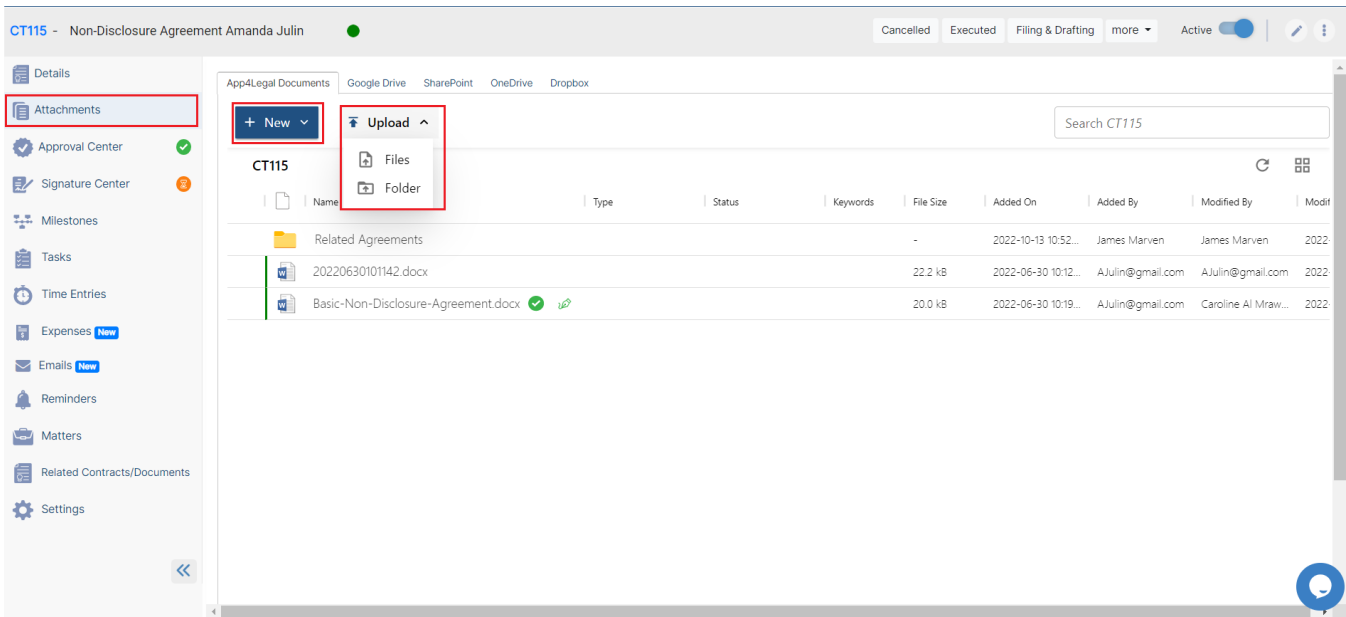
The File/Folder can be managed by simply selecting the attachment you want on the grid, and all the actions will be visible at the top of the page.
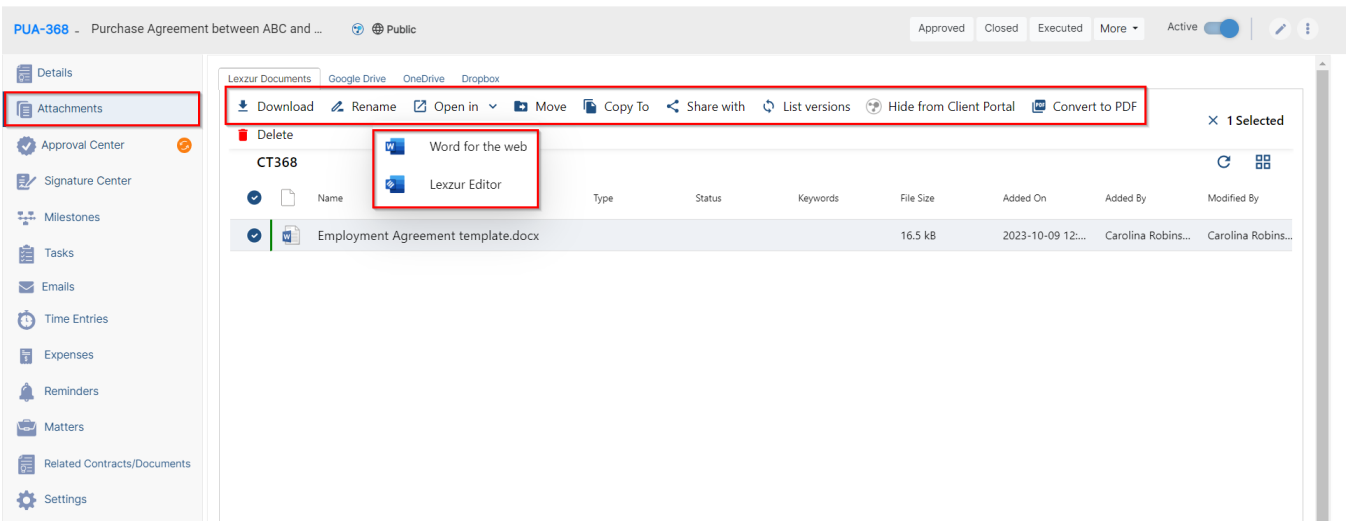
You can Download, Rename, Move, Share files with clients in the client portal and etc...

Files could be opened either using word for the web or LEXZUR Editor a tool that allows users to directly open and modifies different files (Word, Excel, PDF, PowerPoint, etc..). The Editor will automatically upload a newer version of the document into LEXZUR after saving. You can then see the list of versions this document has, the user who added each version, and the date and time, and you can click on any older version to download it.

⚠️ Upon creating a new version of a contract, email notifications will be sent to the contract creator, assignee, requester, and collaborator, providing them with the updated contract details and information about the user who made the modifications.

Folders can also be made private so that only specific people with access can open them. Therefore, select the folder and choose "**Share with"** from the options on the top.

Add the recipients, the users who will give the access, and specify the permission as Editor or just Viewer.

Additionally, with LEXZUR 360 Docs, users can now integrate their LEXZUR instance with Google Drive™, One Drive, Dropbox, and SharePoint. This means users can access their documents, edit them in real-time, share, and more directly through LEXZUR.

⚠️ You must first enable the integration to use LEXZUR 360 Docs. Learn more **here.**

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com.](mailto:help@lexzur.com)

Thank you!