

How to Draft and Collaborate on documents and contracts?

Objectives

- Draft & Collaborate on a contract/ document
- Ability to share a contract with LEXZUR Contract users and add comments.

Steps

In LEXZUR, you can now easily draft contracts without the need to download them. To switch to the Draft and Collaborate tab, click on the Contract name or Contract ID.

The next step is to select the document that you would like to draft.

The screenshot displays the LEXZUR interface for a document titled 'CT115 - Non-Disclosure Agreement Amanda Julin'. The document is currently in 'Drafting' status. The left sidebar shows a navigation menu with options: Details, Attachments, Draft and Collaborate (selected), Approval Center, Signature Center, Milestones, Tasks, Time Entries, Reminders, Matters, Related Contracts/Documents, and Settings. The main content area shows the document title 'NON-DISCLOSURE AGREEMENT (NDA)' and its content. The document text includes: 'This Nondisclosure Agreement or ("Agreement") has been entered into on the date of \${date} and is by and between:', 'Party Disclosing Information: \${Party1} with a mailing address of \${address1} ("Disclosing Party").', 'Party Receiving Information: \${Party2} with a mailing address of \${address2} ("Receiving Party").', and 'For the purpose of preventing the unauthorized disclosure of Confidential Information as defined below. The parties agree to enter into a confidential relationship concerning the disclosure of certain proprietary and confidential information ("Confidential Information").'. The right sidebar shows an 'Approved' status with a green checkmark. The top bar includes a 'Current Document' dropdown menu and action buttons: Edit, Save, Share, Print, and Download.

There are several actions you can take, such as editing, sharing, downloading, or printing.

This screenshot is similar to the previous one, showing the same document and interface. However, the 'Share' button in the top bar is highlighted with a red box, indicating the next step in the process. The document content and sidebar navigation remain the same.

By clicking on the "share" button, you can automatically share the contract document with specific users.

The recipient (people or group) should be added, the message must be entered, and the message should be saved after selecting edit or view mode.

Share with Recipients

Add Recipients

Add people and groups

Editor



Add

People with access



James Marven

elise.khoury@app4legal.com

Owner

Message

Cancel

Save

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

Thank you!