How to Create Contra Predefined Forms

Objectives

• Add predefined forms for the "upload Contract/Document" method

Steps

The "Upload Document/Contract" is a dynamic form also based on a Template of Questionnaires, you can choose the fields/custom fields that you want to appear in the form and in multiple pages.

To create a new form you must first go to the System Settings Contracts & Documents Upload Contract/Document Forms

Owner Devel Marshare Dates		Network Control on Chattana	System Settings
Company Board Members Roles		Matter Container Statuses	Billing and Plan
Custom Fields		Stages	
Company Asset Types	Tasks	Practice Areas & Due Dates	Manage Users
Company Assets Custom Fields		Assignment Rules	Add User
Company Relation Types	Task Types	Custom Helds	Apps Marketplace
Licenses and Waivers Permissions	Task Assignment Rules	Matter value Liers	opps marketplace
	Workflow Statuses	Manage Workflows	
	Locations	SLA Management	
 Litigation Stages 	Custom Fields	Event Types	
	Manage Workflows	Email Templates	
Court Types			
Court Degrees / Circuits			
Court Regions	🐔 Meetings	Contracts & Documents	
Courts			
Hearing Types	Locations	ID Configuration	
Reason of Win or Lose	Meeting Types	Types	
Stage Statuses		Sub types	
Opponent Positions		Boards	
Email Templates	At Time Entries	Party Categories	
	() Time Lindies	Manage Workflows	
	Catenories	Templates	
Reminders	Internal Statuses	Upload Contract/Document Forms	
	Manana non-husiness dave	Approval Center	
Reminder Types	Histoge for bounded days	Signature Center	
		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	SI A Mapagement	
	User Groups Permissions	DocuSion integration	
		booking in integration	

From this page you can view the list of your predefined forms, clone, edit, delete, or add a new one.

A There is a Default Form by the system to be used while uploading contracts in case you haven't created your own Form

Settings / Upload Contract/Document Forms / Add			
Default Form		9	1
NDA	•		
Purchase Agreements	9		

Adding a new form requires filling out some fields:

- Document Form Name: Give this Form a name
- Type: Specify the Type of Contracts related to the created form.
- Page Titles: You can create as many pages as needed.

Each page can contain multiple fields

< Edit Document Form Page 1 × Page 2 ×	Document Form Name * Employment Contract Apply This Form for all Contracts/Documents having: Type * General employment contract	Sub type None	•		Save
+ Add Page	Page Title * General Info	Display Name Date	Required Description short hint on the field	Visible Default Value	Actions
	II Name •	Name	ehort hint on the field	Employment	0

You can include any field (system fields or custom fields) in addition to collaborator field when configuring contract forms.

< Edit Document Form	Document Form Name * Employment Contract Apply This Form for all Contracts/Documents having: Time *	Sub-base					Save
Page 1 ×	General employment contract	None	*				
Page 2 × + Add Page	Page Title * General Info	_					
	Field	Display Name	Required	Description	Visible	Default Value	Actions
	₩ Date +	Date		short hint on the field			Û
	II Name •	Name		short hint on the field			Û
	H Collaborators •	Collaborators		short hint on the field		Adam Christopher	2, B
	+ Add Field						

So, choose the fields you want, give them a display name, add a description when needed, and specify the required fields and the ones you wish to show or hide from the form as well.



Repeat the process for all the pages. Then save your changes.

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

Thank you!