















Contract Types Table

The Contract Types table is a background table used to populate the Contract Type field of a contract record. Each Contract Type record holds a value displayed as a choice in the Contract Type field. It also determines the default approval workflow for the contract, as well as the default print template for auto-generation of draft contract documents.

Contract Types						
Status: 9 record(s) found, 1 pages. Click here to re-count records.						
New Mass Edit Save Changes Cancel Changes Delete Actions ▾				Views ▾ Search ▾  ▾  ▾		
<input type="checkbox"/> Edit	ID ↓	Contract Type 	Default Workflow Title	Has Print Template(s) 	Status 	
<input type="checkbox"/>	 9	Other	Legal Approval (One Step)	No	Active	
<input type="checkbox"/>	 8	Partner Agreement	Dept. Head and Legal Sequential Approval	No	Active	
<input type="checkbox"/>	 7	Non-Disclosure Agreement	Legal Approval (One Step)	Yes	Active	
<input type="checkbox"/>	 6	Employment Agreement	Dept. Head and Legal Sequential Approval	Yes	Active	
<input type="checkbox"/>	 5	Customer Service Contract	Dept. Head and Legal Sequential Approval	Yes	Active	
<input type="checkbox"/>	 4	Vendor Parts only Contract	Contract Mgr, Legal, Compliance, and Risk Parallel Approval	No	Active	
<input type="checkbox"/>	 3	Vendor Subscription Service	Dept. Head, Finance, Conditional Compliance, and Legal Sequential Approval	Yes	Active	
<input type="checkbox"/>	 2	Vendor Software License	IT and Finance Sequential Approval for Software Licenses	No	Active	
<input type="checkbox"/>	 1	Vendor Product Support and Upgrades	Dept. Head and Legal Sequential Approval	Yes	Active	

Use Case

Contract Types can be created and edited by admins and Contract Managers. The Contract Type, Contract Type ID, Has Print Template(s), Default Print Template ID, and Contract Type Default Workflow ID, Extra Fields to Show are pulled into the Contracts table as a link to selected fields from the Contract Type table.

If the Has Print Template(s) field value is Yes, additional fields in the Contract record are visible: Print Template to Generate and Create and Attach (an action button). The Default Print Template ID field is used to determine the default value in the Print Template to Generate field. Selecting a Default Print Template Title in a Contract Type record creates a link to the print template and updates the Available for Contract Types field in the associated Print Template record.

The Default Workflow Title field is used to set the value for the linked field in a Contract that pulls in the Workflow Title from the Workflow table. Selecting a Default Workflow Title in the Contract Type record creates a link to the workflow.

Contract Type

Save Cancel Contract Type Print Templates and Workflows History

ID 7 Status Active

*Party Type Vendor

*Contract Type Non-Disclosure Agreement

This field can be used to show or hide fields in the Contract by making them visibility dependent on whether this field (when pulled into the Contract along with the Contract Type) contains a particular value. If you do not choose Locations, then that field will not be displayed in the Contract.

Extra Fields to Show

Description has clauses with numbering in them, conditional based on renewal type=evergreen or not

Default Workflow Title Legal Approval (One Step)

Has Print Template(s) Yes No

*Default Print Template Title Default NDA for clauses with numbering *Print Template File [nda-no-numbering-conditional.docx](#)

Save Cancel

You can view all associated print templates and workflows on the Print Templates and Workflows tab of a contract type record. From here you can use the related table action bar to Unlink a print template or workflow from the contract type record if necessary.

Available Print Templates

Status: 3 record(s) found, 1 pages. Click [here](#) to re-count records.

[New](#) | [Mass Edit](#) | [Save Changes](#) | [Cancel Changes](#) | [Delete](#) | [🔍](#) | [Unlink](#) | [Actions](#) ▼ | [Views](#) ▼ | [Search](#) ▼ | [📄](#) ▼ | [📄](#) ▼

<input type="checkbox"/>	Edit	ID ↓	Title	Status	Template File
<input type="checkbox"/>		12	NDA Numbered Normal Style	Active	nda-normalwithnumbering.docx
<input type="checkbox"/>		11	Default NDA for clauses with numbering	Active	nda-no-numbering-conditional.docx
<input type="checkbox"/>		8	NDA clauses using table for numbering	Active	clauses-nda-tablenumbering-conditional.docx

Available Workflows

Status: 4 record(s) found, 1 pages. Click [here](#) to re-count records.

[New](#) | [Mass Edit](#) | [Save Changes](#) | [Cancel Changes](#) | [Delete](#) | [🔍](#) | [Unlink](#) | [Actions](#) ▼ | [Views](#) ▼ | [Search](#) ▼ | [📄](#) ▼

<input type="checkbox"/>	Edit	ID ↓	Workflow Title	Status	Related To	Number of Approvals
<input type="checkbox"/>		7	Dept. Head, Finance, Conditional Compliance, and Legal Sequential Approval	Active	Contracts	4
<input type="checkbox"/>		5	Dept. Head and Legal Sequential Approval	Active	Contracts	2
<input type="checkbox"/>		4	Contract Manager and Dept. Head Parallel Approval with Conditional Legal and Finance	Active	Contracts	5
<input type="checkbox"/>		1	Legal Approval (One Step)	Active	Contracts	1