

Create Contract

This guide shows how to convert a static legal contract into a dynamic one.



1 Define goals

The intent of this guide is not to create a real contract, but instead to show the steps required to do so. The end result is just a sample document.

Goals

- Start with contract template that is in public domain or otherwise available
- Copy and paste or import text into Tag
- Define data fields needed to make content dynamic
- Replace underline areas in contract with data references
- Make at least one clause conditional

2 Copy/import raw text into Tag

There are many free contract templates. This one is from [docsketch](#). Most of the clauses have been deleted.

You can paste from clipboard, or use the *Create report from *.docx document...* menu item under the *plus menu* under the file tree.

As you decide which clauses to keep, make notes about what data fields you want, both for inserting values and driving conditional logic.

The screenshot displays the nSymbol Tag application. The top bar shows the user name 'Sam Jones'. The left sidebar has tabs for 'Forms', 'Templates', and 'Setup'. Under 'Templates', there is a 'Favorites' section with 'tag-demos' and a sub-section 'create-template' containing 'Purchase contract.txt'. The main workspace shows a document titled 'Purchase_contract-start' with a toolbar and a text area containing a contract template snippet:

This Sales Agreement (the "Agreement") is entered into _____ (the "Effective Date"), by and between _____, with an address of _____ (the "Seller") and _____, with an address of _____, (the "Buyer"), also individually referred to as "Party", and collectively "the Parties."

BACKGROUND:

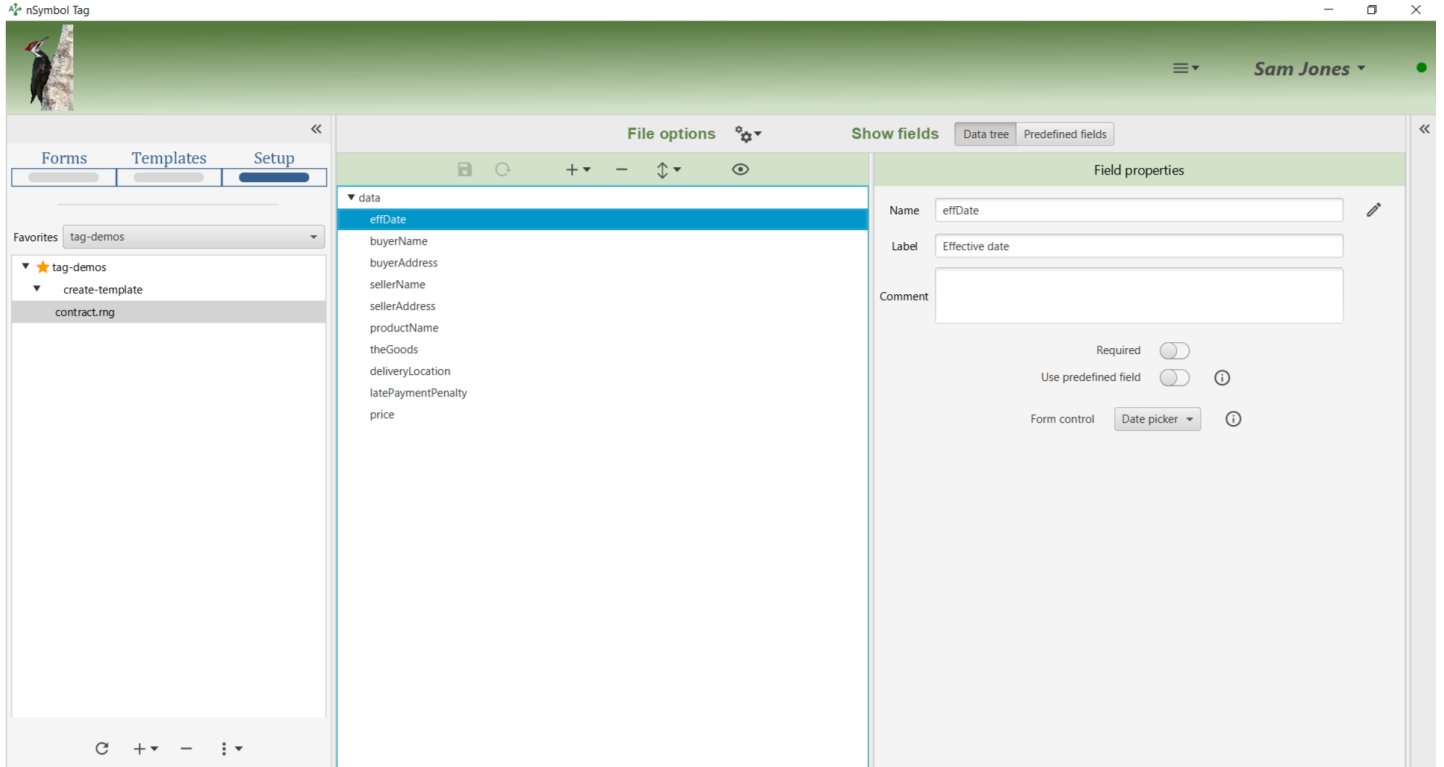
The Seller is the manufacturer/distributor of the following product(s):

_____;



3 Create data setup file

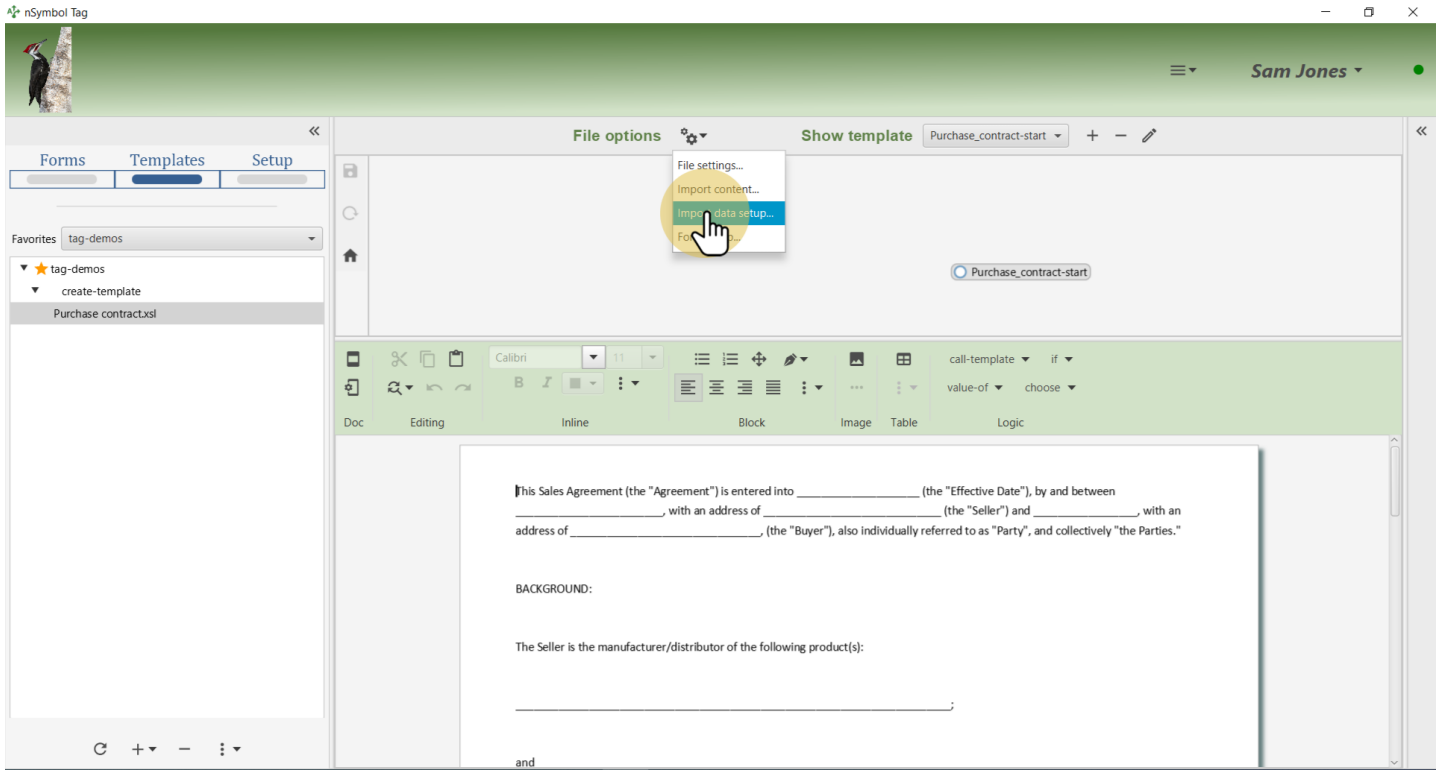
In the *Setup* screen, create contract.rng and add fields identified in the previous step. Add *Labels* and select the appropriate *Form control* for each field.





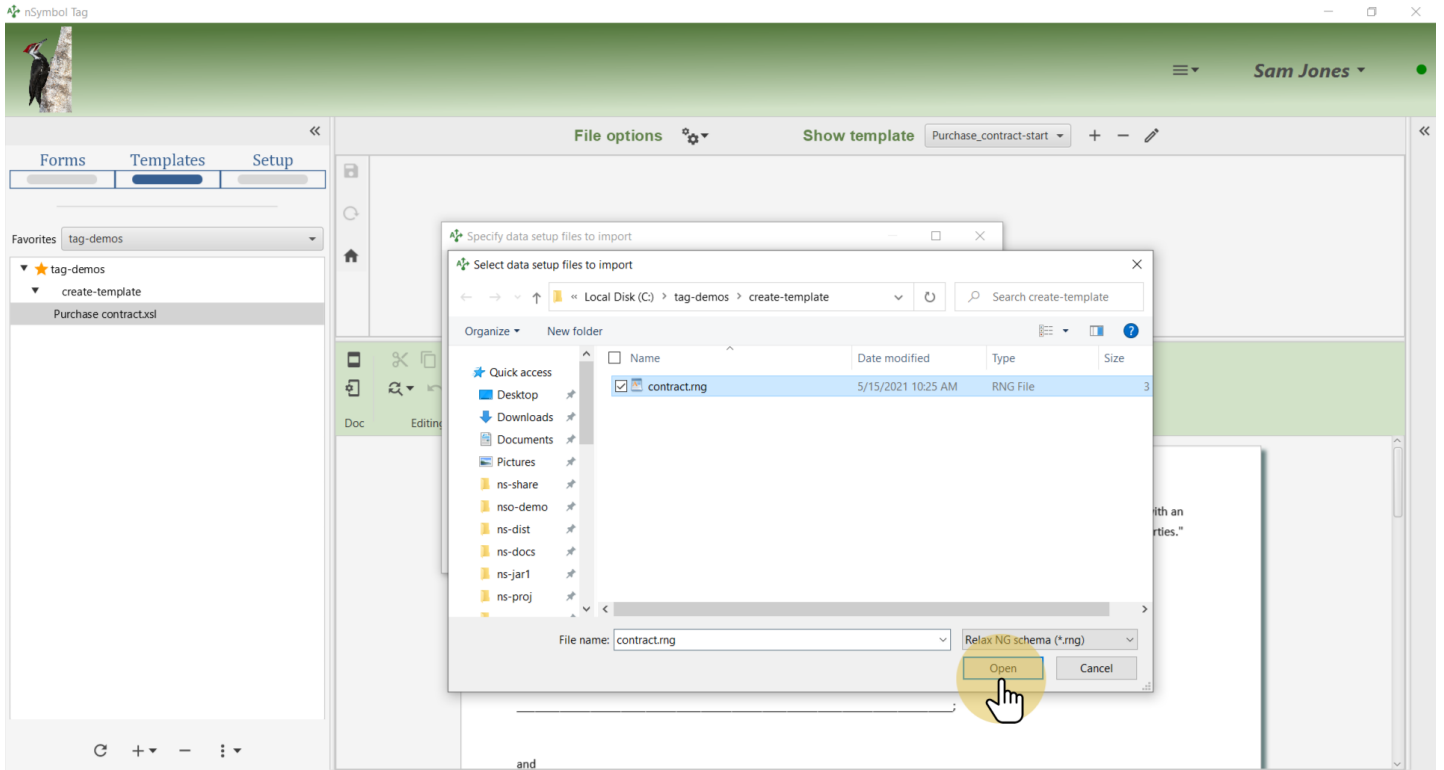
4 Import data setup

Return to the *Templates* screen and use the *Import data setup...* menu item to open an import dialog.



5 Select file to import

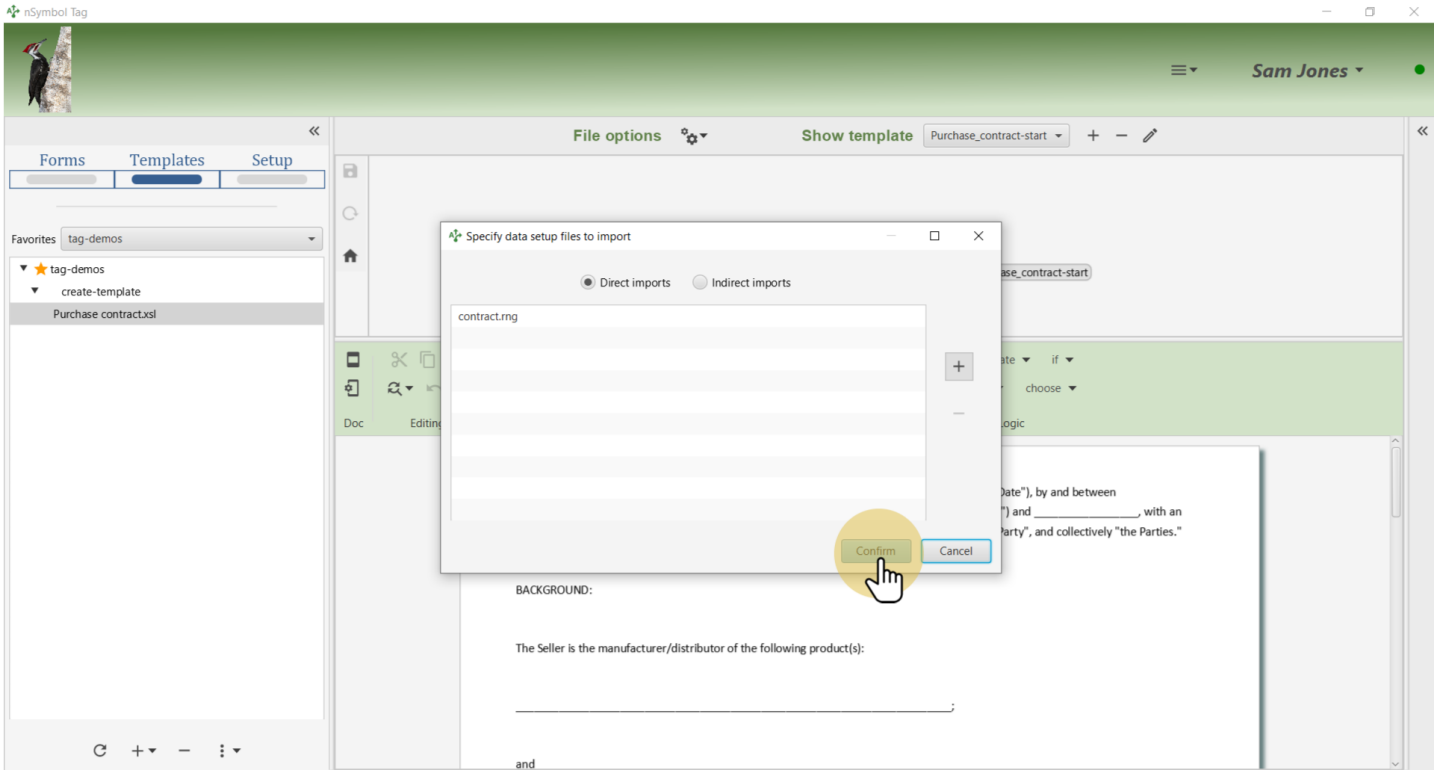
Select the data setup file created earlier and click *Open*.





6 Confirm import

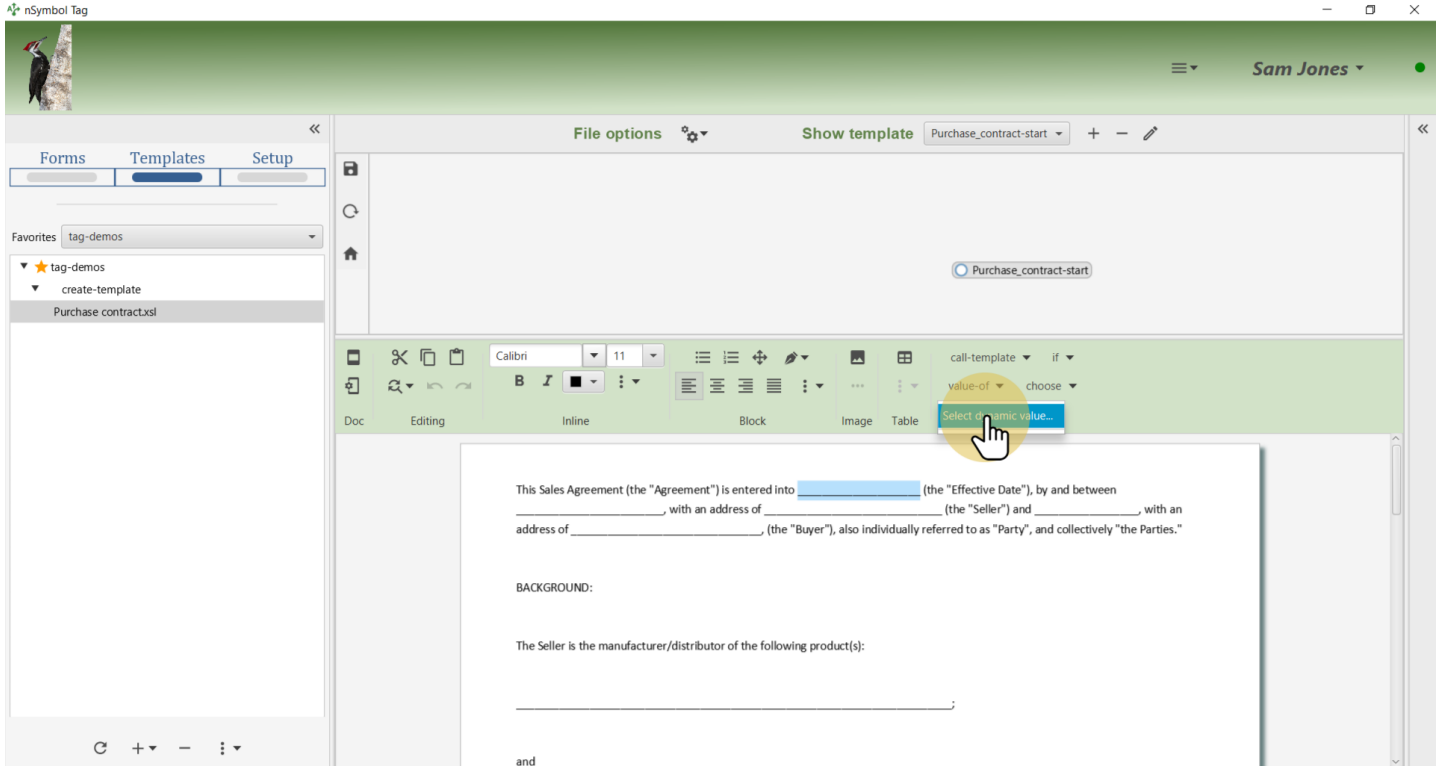
Click the *Confirm* button to add the file as a direct data setup import.





7 Insert effective date

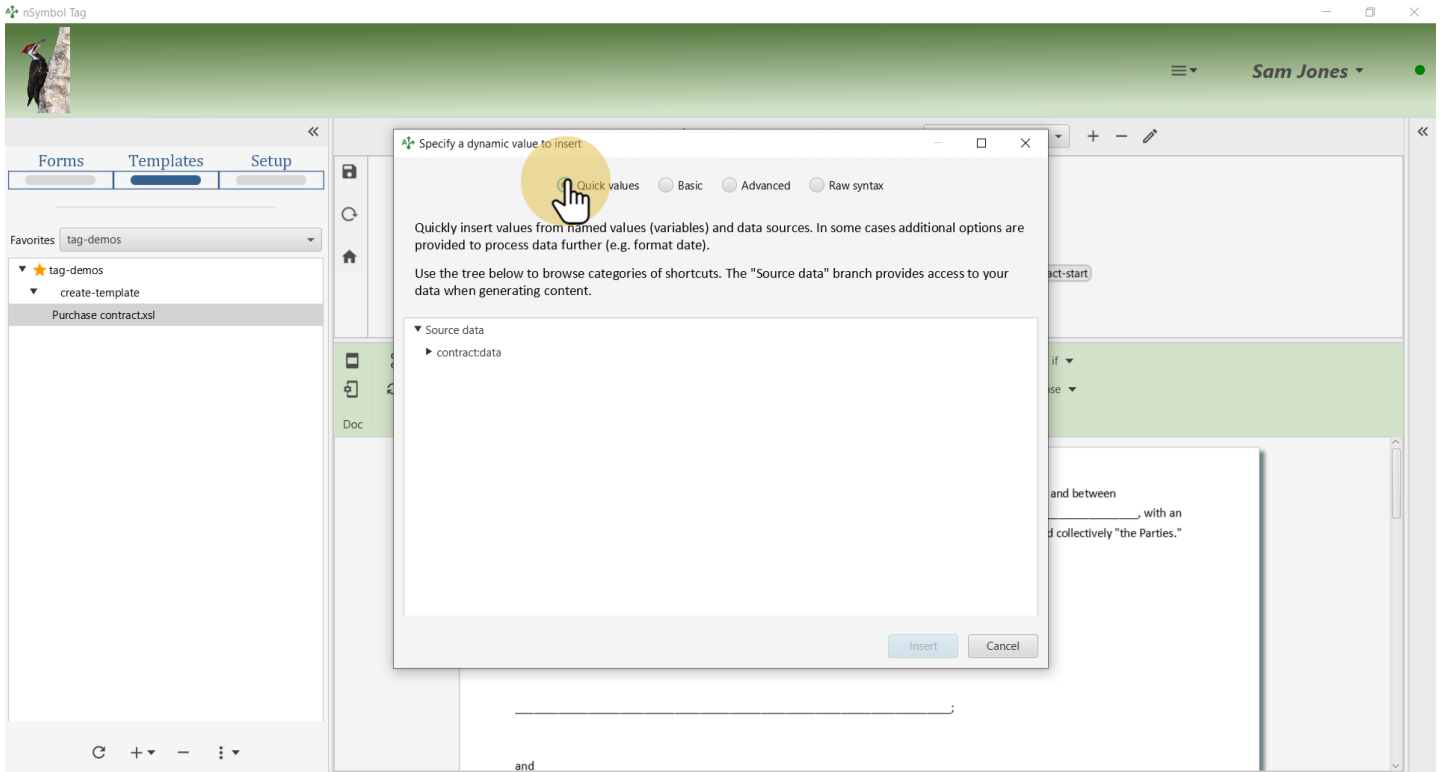
Select the underline area representing effective date and open the *value-of menu* on the *Logic* toolbar. Use the *Select dynamic value...* menu item to open the expression dialog.





8 Go to Quick values panel

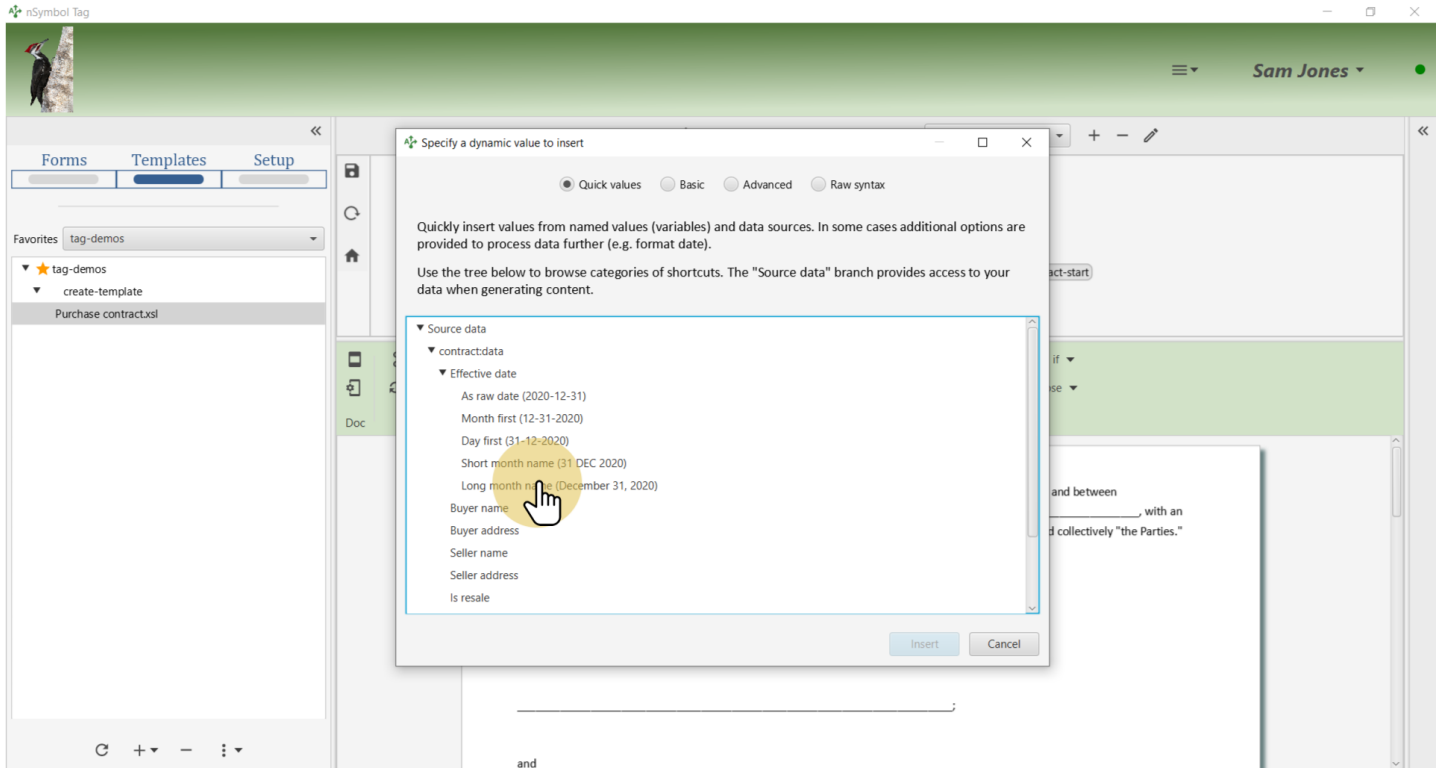
Click on the *Quick values* radio button and expand the *Source data* tree.





9 Insert effective date value

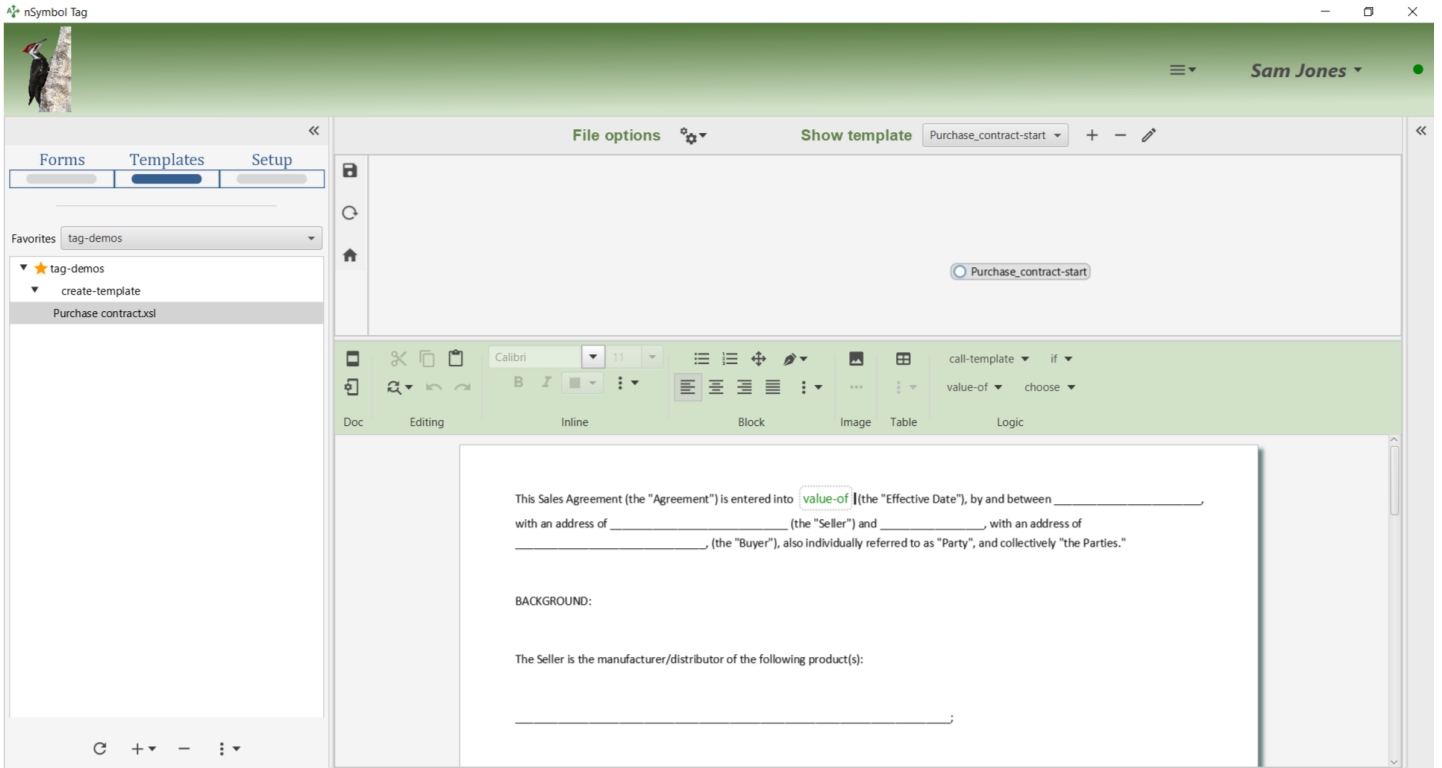
Expand the Effective date branch and select the desired date format. Click *Insert* when done.





10 Repeat for all fields

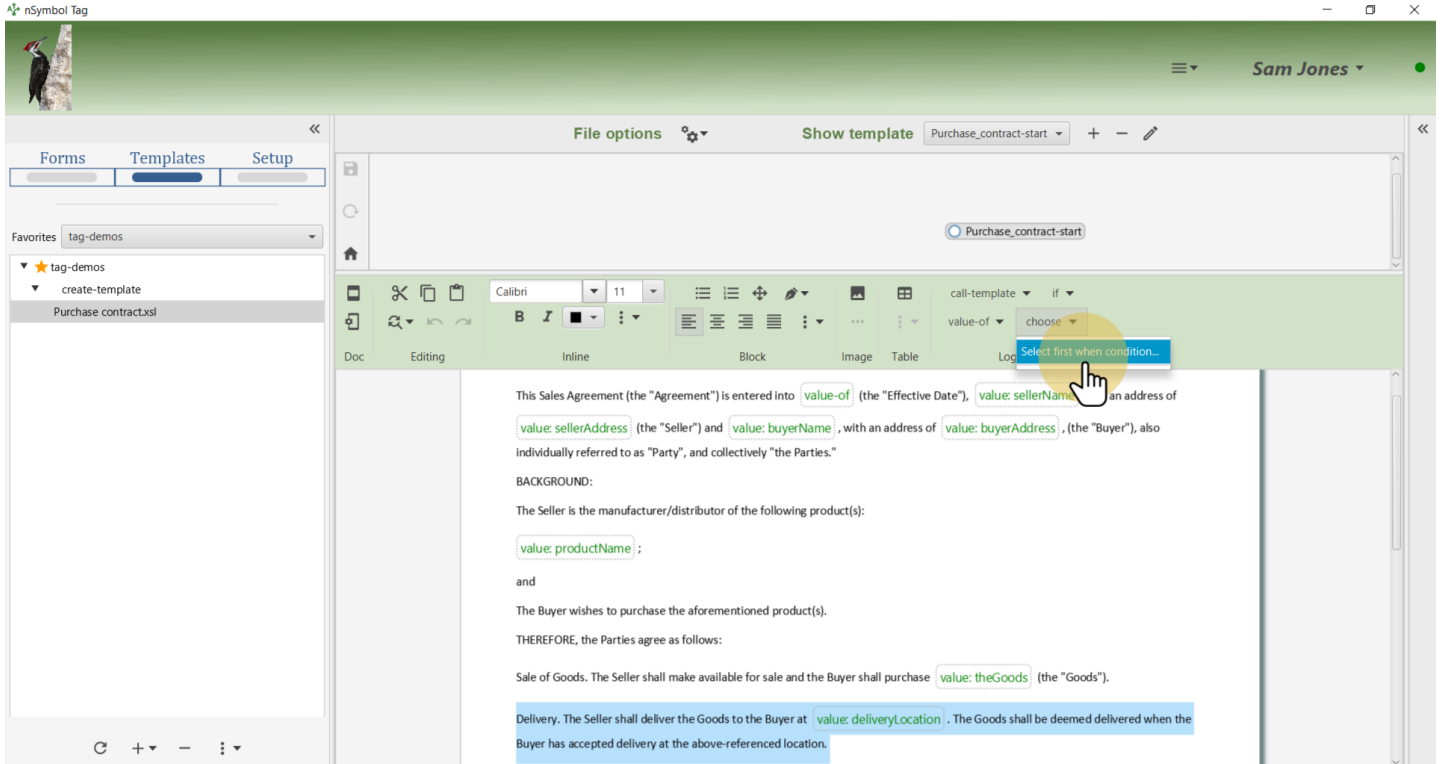
Repeat the prior step for all underline areas.





11 Make delivery clause conditional

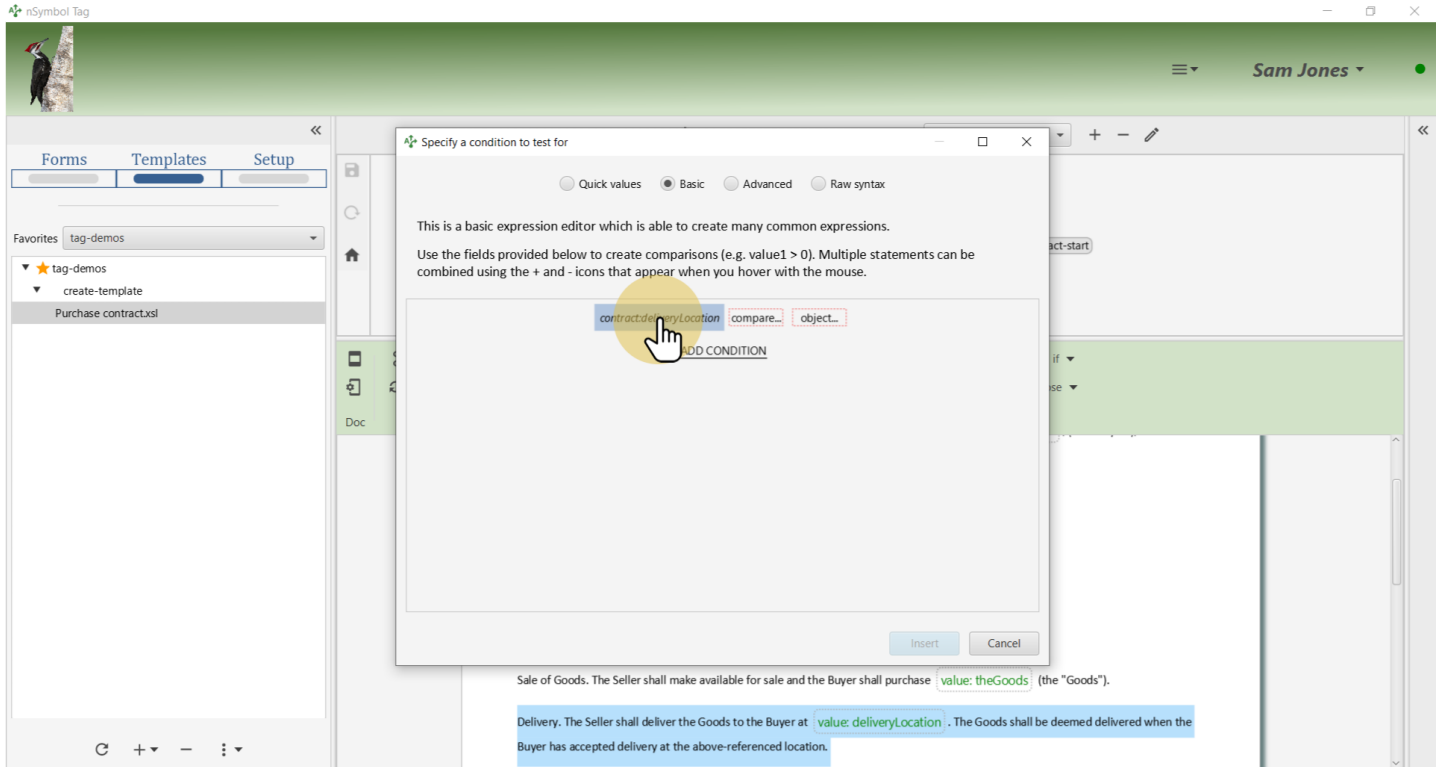
Select the delivery clause in text and use the *Select first when condition...* menu item under the *choose menu* on the *Logic* toolbar. This will open the expression editor.





12 Create an expression

Select the *Basic* panel which builds one or more 3-part condition statements. Click on the *left part* and select *Delivery location* in the *Source data* menu.





13 Complete the expression

Finish this expression by selecting "does not equal" in the center part, and a *Literal string value* of " in the right part. Click *Insert* when done.



14 Expand the decision tree

Expand the *decision tree graph* to view the logical flow of this clause. A *choose/when* instruction will insert the first *when* fragment that has an expression which returns true, or the *otherwise* fragment if there is one.

The screenshot shows the nSymbol Tag software interface. On the left, there is a sidebar with 'Forms', 'Templates', and 'Setup' tabs. Below these are 'Favorites' and a tree view showing 'tag-demos' > 'create-template' > 'Purchase contract.xml'. The main workspace is titled 'Purchase_contract-start' and shows a decision tree graph. A node labeled 'choose' is highlighted with a yellow circle and a hand cursor. This node branches into two paths: 'when' and 'otherwise'. Below the graph is a rich text editor with a toolbar. The text in the editor is a legal clause with several value fields in green boxes: 'value-of', 'value: sellerName', 'value: sellerAddress', 'value: buyerName', 'value: buyerAddress', 'value: productName', 'value: theGoods', and 'value: price'. The text reads: 'This Sales Agreement (the "Agreement") is entered into [value-of] (the "Effective Date"), [value: sellerName] with an address of [value: sellerAddress] (the "Seller") and [value: buyerName], with an address of [value: buyerAddress], (the "Buyer"), also individually referred to as "Party", and collectively "the Parties." BACKGROUND: The Seller is the manufacturer/distributor of the following product(s): [value: productName]; and The Buyer wishes to purchase the aforementioned product(s). THEREFORE, the Parties agree as follows: Sale of Goods. The Seller shall make available for sale and the Buyer shall purchase [value: theGoods] (the "Goods"). [choose] Purchase Price & Pavments. The Seller agrees to sell the Goods to the Buyer for \$ [value: price]. The Seller will provide an invoice to the'



15 Review the when fragment

Nothing needs to be done here. This *when* fragment will be inserted if the `deliveryLocation` field has a non-empty value. Review that the wording is still what you want.

The screenshot shows the nSymbol Tag software interface. At the top, the user is identified as 'Sam Jones'. The main workspace is divided into several sections:

- Left Panel:** Contains 'Forms', 'Templates', and 'Setup' tabs. Under 'Templates', there is a 'Favorites' section with 'tag-demos' and a sub-section 'create-template' containing 'Purchase contract.xml'.
- Top Bar:** Shows 'File options', 'Show template', and a dropdown menu for 'Purchase_contract-start'.
- Diagram Area:** A flow diagram with nodes 'Purchase_contract-start' and 'choose'. A yellow circle highlights a 'when' fragment node connected to the 'choose' node.
- Configuration Area:** Below the diagram, the 'Show when:' field contains the condition: `contract:deliveryLocation does not equal ""`.
- Rich Text Editor:** Below the configuration, the text reads: "Delivery. The Seller shall deliver the Goods to the Buyer at `value: deliveryLocation`. The Goods shall be deemed delivered when the Buyer has accepted delivery at the above-referenced location."
- Bottom Panel:** A toolbar with various editing tools and a 'Logic' section.

The Windows taskbar at the bottom shows the system clock as 2:03 PM on 5/15/2021.



16 Add an otherwise fragment

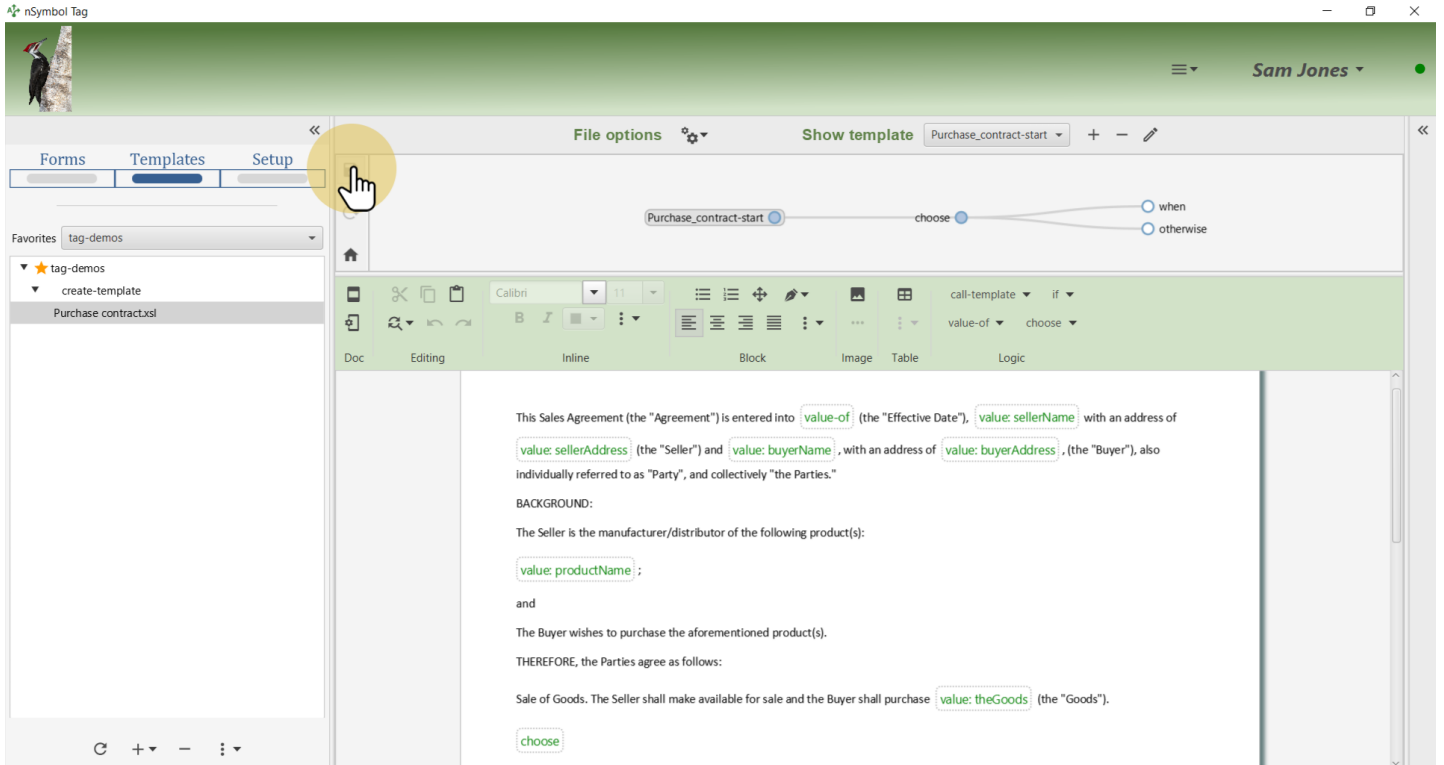
Click on the *otherwise* branch in the *decision tree* and type some content.

The screenshot shows the nSymbol Tag software interface. On the left is a sidebar with 'Forms', 'Templates', and 'Setup' tabs. Under 'Templates', there is a 'Favorites' section with 'tag-demos' and a tree view containing 'tag-demos', 'create-template', and 'Purchase contract.xml'. The main workspace is titled 'Purchase_contract-start' and shows a decision tree diagram with nodes 'Purchase_contract-start', 'choose', 'when', and 'otherwise'. The 'otherwise' branch is selected. Below the diagram is a rich text editor with a toolbar (Doc, Editing, Inline, Block, Image, Table, Logic) and the text: 'The Buyer shall pick up The Goods at the above-referenced Seller's address.'



17 Save changes, go to Forms

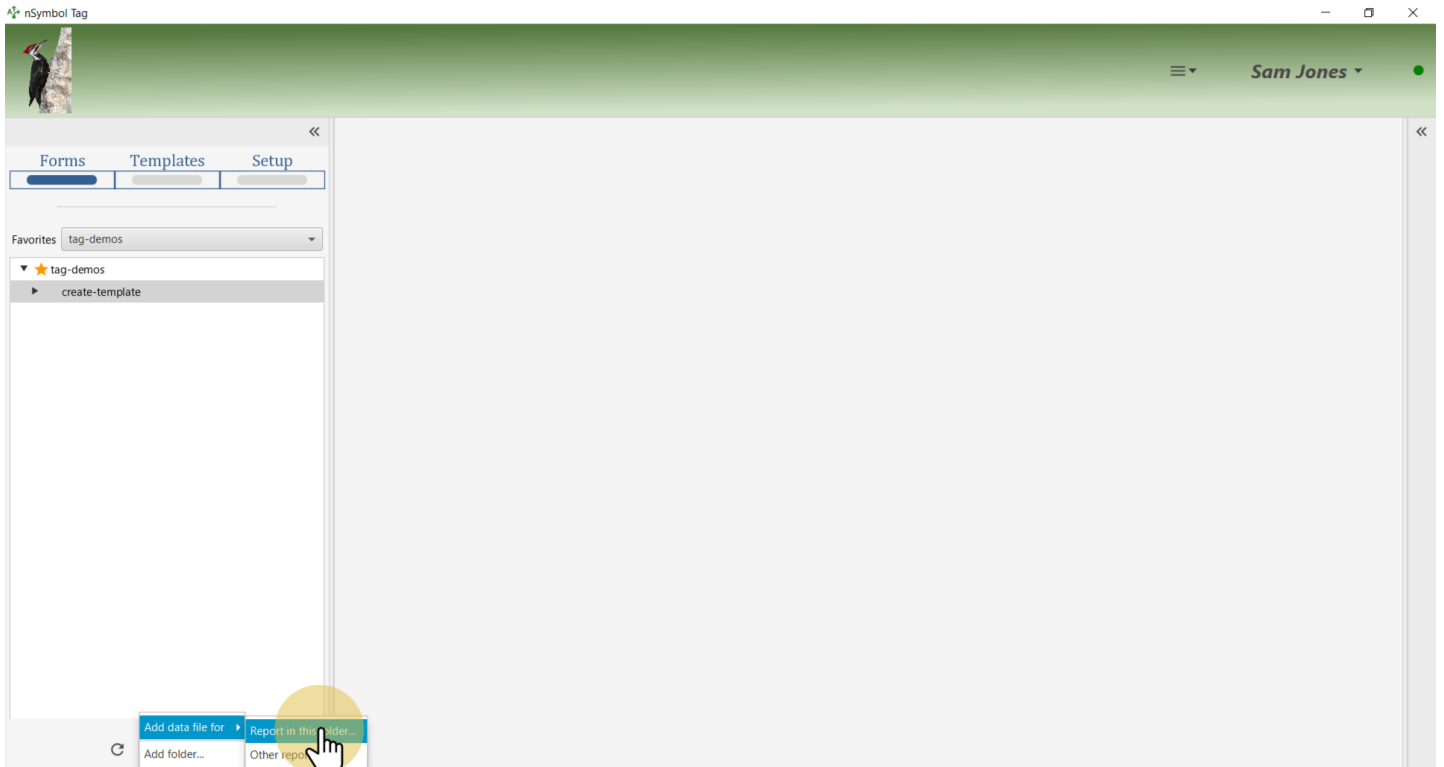
Click the save tool and go to the *Forms* screen to test the new dynamic contract. Note that an *if* instruction was also added to hide the late payment penalty clause if the late payment checkbox in the form is false.





18 Create a data file

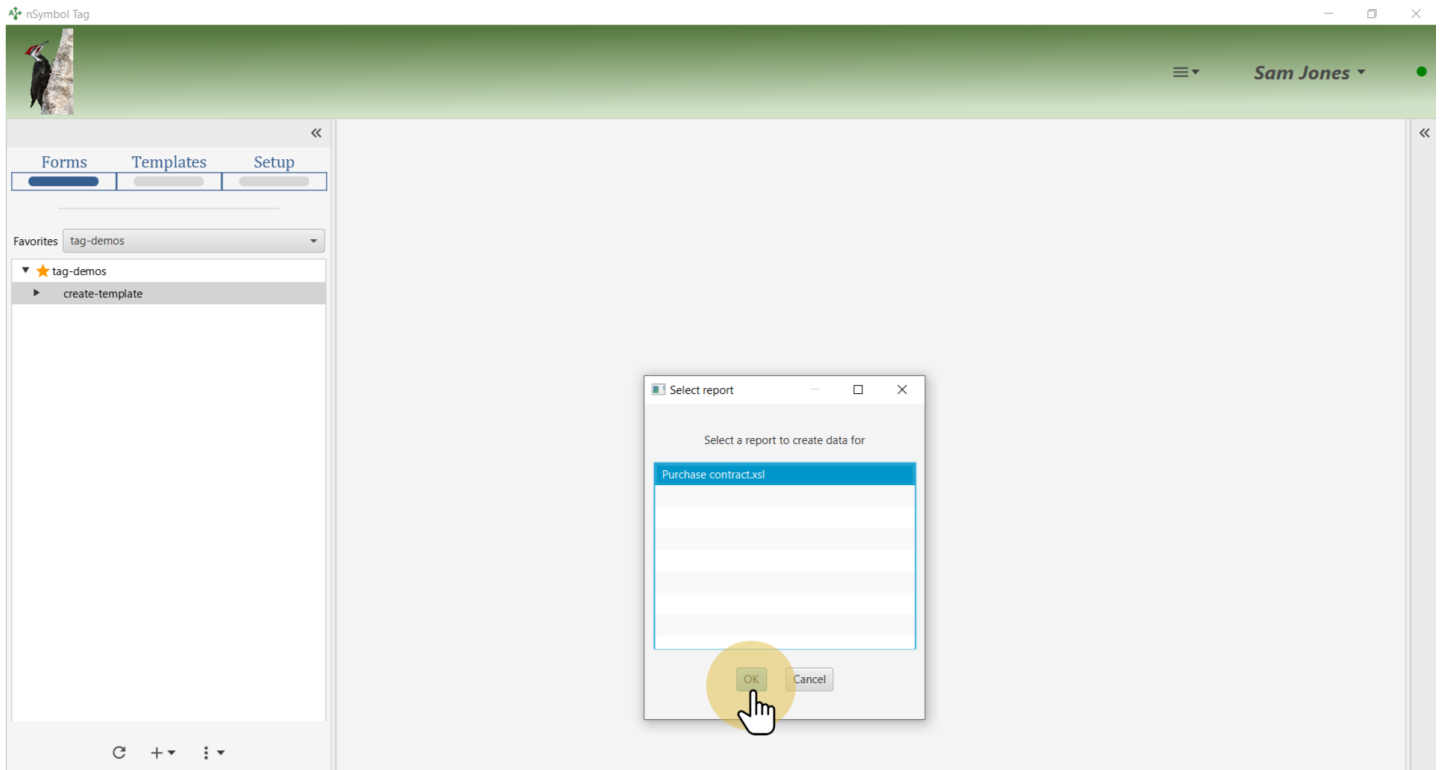
Using the *plus menu* beneath the file tree, use the *Add data file for / Report in this folder...* menu item to open a dialog.





19 Select the report

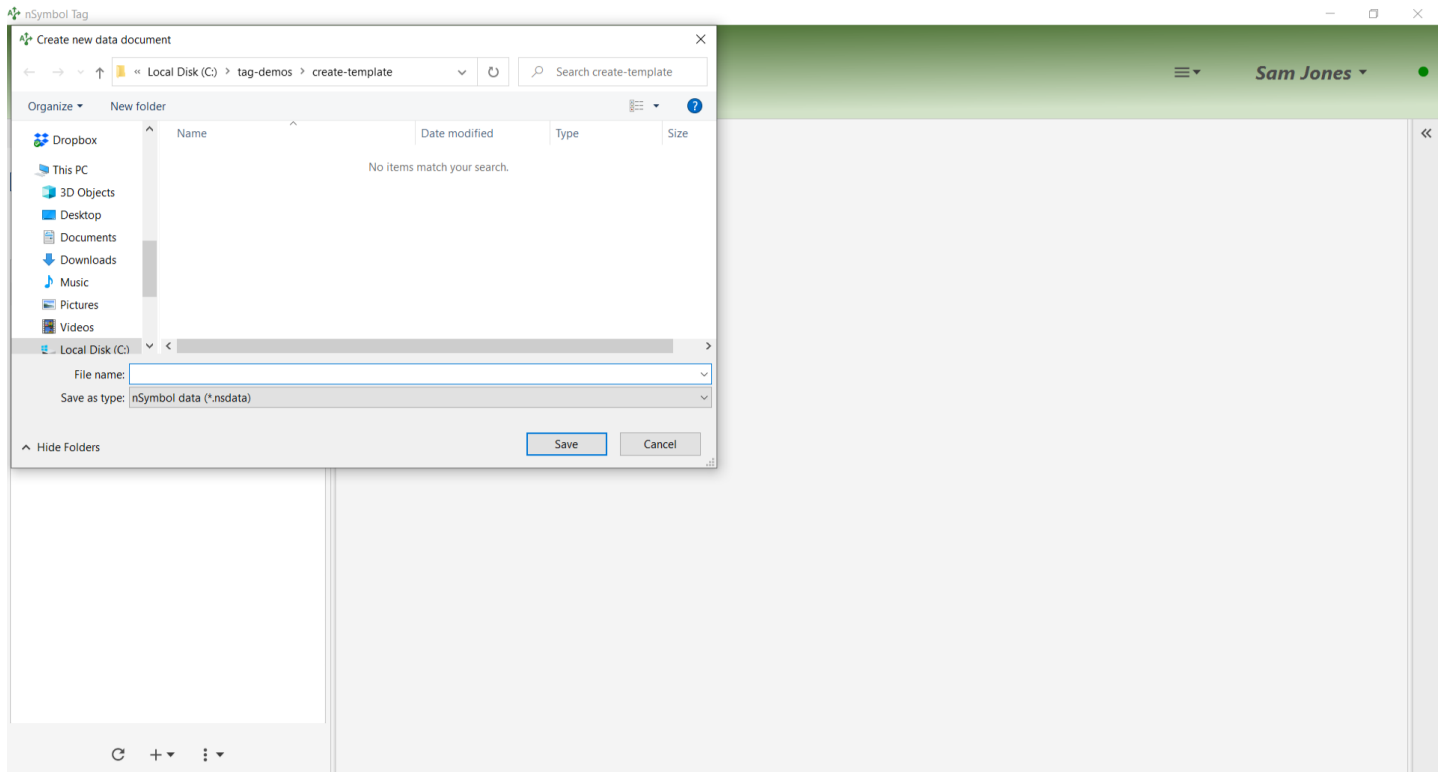
Select the report created earlier and click *OK*.





20 Name the data file

Enter a file name using using the standard Windows or Mac file selection dialog.





21 Enter data

Go to the *contract form tab*, enter some test data and click the Save button.

The screenshot shows the 'contract' form in the nSymbol Tag application. The interface includes a top navigation bar with a user profile 'Sam Jones' and a sidebar with a 'Favorites' list containing 'tag-demos', 'create-template', and 'testContract.npdata'. The main form area is titled 'contract' and contains the following fields:

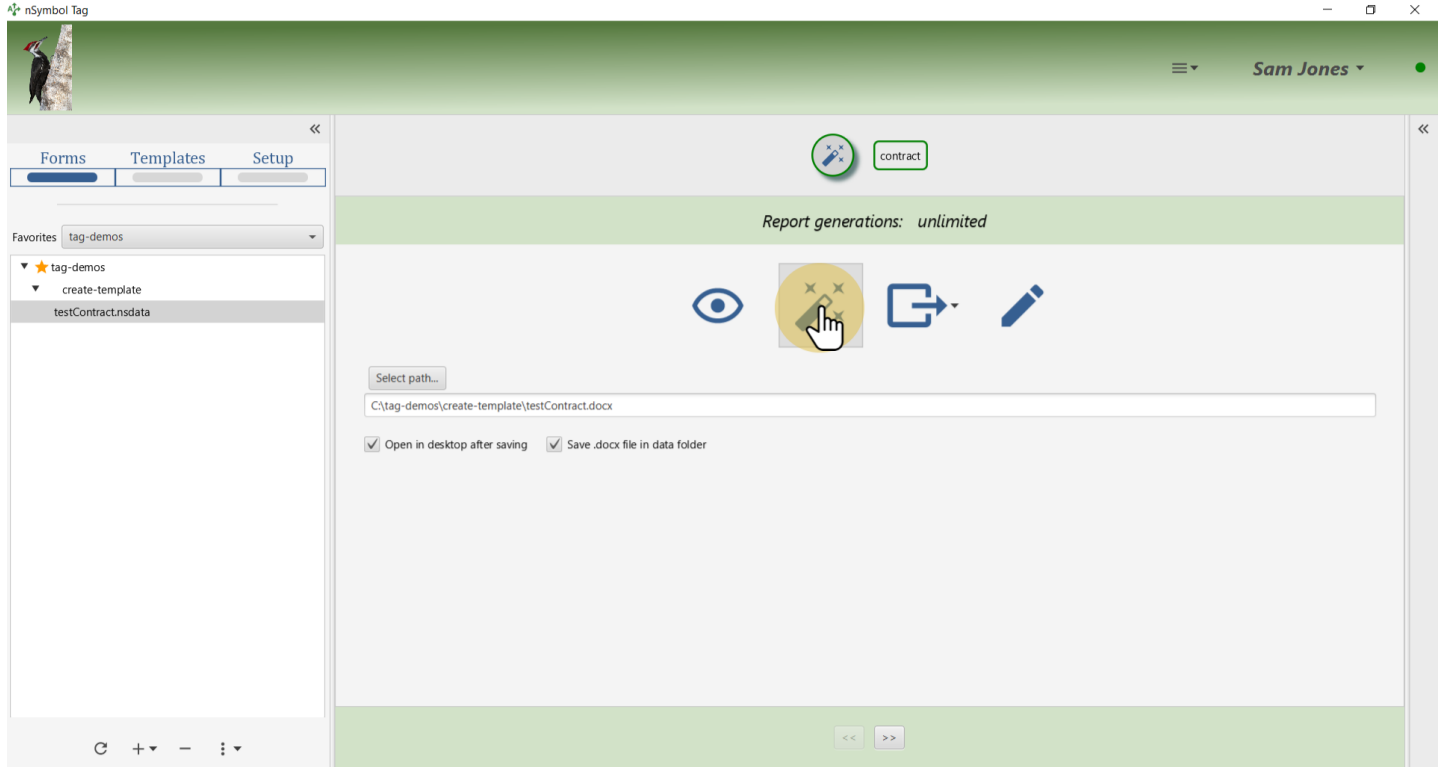
- Effective date: A date input field with a placeholder 'yyyy-mm-dd' and a date picker icon highlighted by a hand cursor.
- Buyer name: A text input field.
- Buyer address: A large text area for the buyer's address.
- Seller name: A text input field.
- Seller address: A large text area for the seller's address.
- Product name: A text input field.
- The Goods: A text input field.

At the bottom of the form, there are navigation buttons: '<<', 'Save', 'Save and view next', and '>>'.



22 Generate the contract

Click the *magic wand tab* to return to the generate page. Click on the *big magic wand* tool to generate a *.docx copy of the contract.





23 Open *.docx document

After generation, the new contract will open in your default word processor ready for final editing.

It is considered best practice to rename this file before editing manually, to avoid losing manual edits in the event of accidental re-generation.

This Sales Agreement (the "Agreement") is entered into May 15, 2021 (the "Effective Date"), by and between Jill, with an address of East of the Hill (the "Seller") and Jack, with an address of West of the Hill, (the "Buyer"), also individually referred to as "Party", and collectively "the Parties."

BACKGROUND:

The Seller is the manufacturer/distributor of the following product(s):

Pail of water;

and

The Buyer wishes to purchase the aforementioned product(s).

THEREFORE, the Parties agree as follows:

Sale of Goods. The Seller shall make available for sale and the Buyer shall purchase 1 pail filled with water (the "Goods").

Delivery. The Seller shall deliver the Goods to the Buyer at Top of the Hill. The Goods shall be deemed delivered when the Buyer has accepted delivery at the above-referenced location.

Purchase Price & Payments. The Seller agrees to sell the Goods to the Buyer for \$1. The Seller will provide an invoice to the Buyer at the time of delivery. All invoices must be paid, in full, within thirty (30) days. Any balances not paid within thirty (30) days will be subject to a five percent (5%) late payment penalty.

... other clauses ...

The Parties agree to the terms and conditions set forth above as demonstrated by their signatures as follows:



24 All done

That's it for this guide. Try changing the `deliveryLocation` and `latePaymentPenalty` flag to see how the content changes. You can repeat these steps using other contract templates and/or other document types.

All files described in this guide can be downloaded from the "Legal contract (product)" sample in the *Samples app*.

