

## training - Bug #2615

# Dynamic Agreement Drafting & Template Management for Charging Stations

05/13/2026 02:46 AM - Piyush Vijay

<b>Status:</b>	New	<b>Start date:</b>	05/13/2026
<b>Priority:</b>	Normal	<b>Due date:</b>	
<b>Assignee:</b>	Yashaditya Singh	<b>% Done:</b>	0%
<b>Category:</b>		<b>Estimated time:</b>	0.00 hour
<b>Target version:</b>		<b>Spent time:</b>	0.00 hour

### Description

Develop an Agreement Drafting module in the CMS that allows users to create and save reusable agreement templates for different charging station partnership scenarios. The system should automatically populate station, partner, and company details dynamically into the agreement and generate a printable/downloadable agreement document.

This feature will eliminate the need to manually prepare agreements every time for new stations, partners, vendors, or landowners.

### Business Requirement

Currently, agreements are prepared manually for every charging station or partnership setup. This process is time-consuming and error-prone.

A dynamic agreement generation system is required where:

- Agreement drafts/templates can be saved
- Different agreement types can be managed
- Station and partner details are auto-filled dynamically
- Final agreements can be previewed, printed, and downloaded

### Supported Agreement Types

Examples:

- Landowner Agreement
- Revenue Sharing Agreement
- Franchise Agreement
- Vendor Agreement
- Site Lease Agreement
- Charging Station Installation Agreement
- Custom Agreements

## Requirements

### Agreement Template Management

Add a new module:

#### “Agreement Templates”

Users should be able to:

- Create new agreement templates
- Edit existing templates
- Save draft templates
- Duplicate templates
- Delete inactive templates
- Categorize templates by agreement type

### Dynamic Placeholder Support

Templates should support dynamic placeholders/variables such as:

Placeholder	Example Value
-----	-----
Station Name	Rama's Resort
Station Address	Jaipur, Rajasthan

Partner Name	Mohit Tailor
Company Name	ChargeJet
Agreement Date	01-Apr-2026
Revenue Share	20%
Partner Type	Landowner
Contract Duration	5 Years

### Agreement Generation Flow

- User selects agreement template
- User selects:
  1. Station
  2. Partner
  3. Agreement type
- System auto-fills all available details dynamically
- User can review/edit content before finalization
- Generate final agreement document
- Allow:
  1. Print
  2. Download PDF
  3. Save copy in system

### Agreement Editor

Provide a rich text editor supporting:

- Text formatting
- Headers
- Tables
- Signature sections
- Terms & conditions
- Dynamic variable insertion
- Page breaks
- Company branding/logo

### Preview & Print

Users should be able to:

- Preview agreement before generation
- Print agreement directly
- Download as PDF
- Generate final formatted document

### Agreement Storage

Generated agreements should be stored and linked with:

- Station
- Partner
- Agreement type
- Generated date
- Generated by user

### Agreement History

Maintain history of:

- Generated agreements
- Edited templates
- Version updates
- Regenerated agreements

### Access Control

Allow role-based permissions for:

- Create templates
- Edit templates
- Generate agreements
- Download agreements
- Delete templates

**Validation Requirements**

- Mandatory placeholders should not remain empty
- Agreement generation should fail if required station/partner data is missing
- Template deletion should be restricted if actively used