How to Manage Contracts Workflows

Objectives

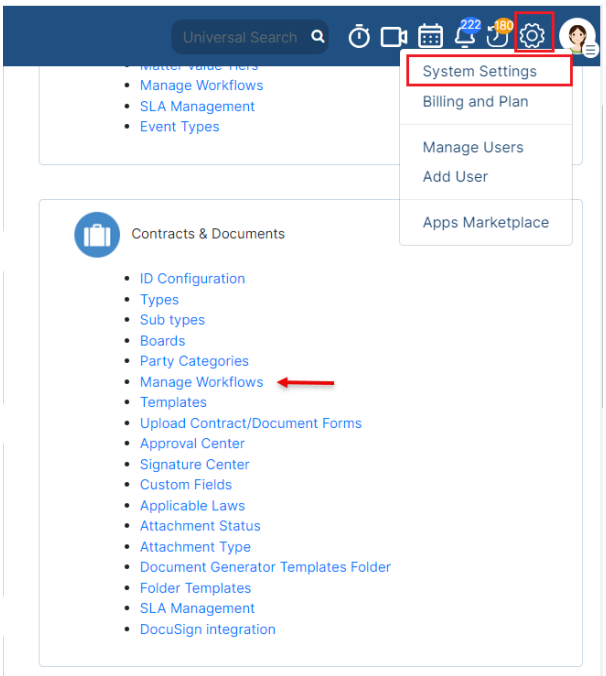
- Add Workflows
- Add Workflow Statuses
- Manage Workflows

Steps

In LEXZUR, you can customize contracts workflows to replicate the legal processes in your office

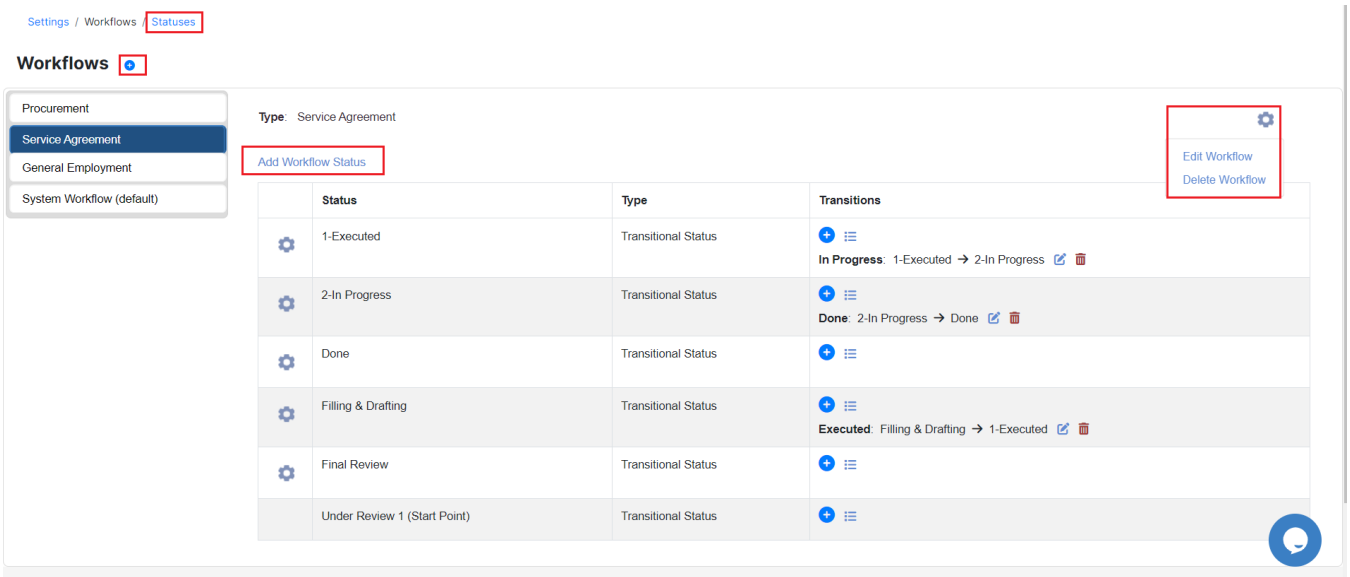
Add Workflow:

First, go to the **System Settings,** then **Manage Workflows** under the Contracts & Documents settings.



From this page, you will be able to manage and add your workflows.

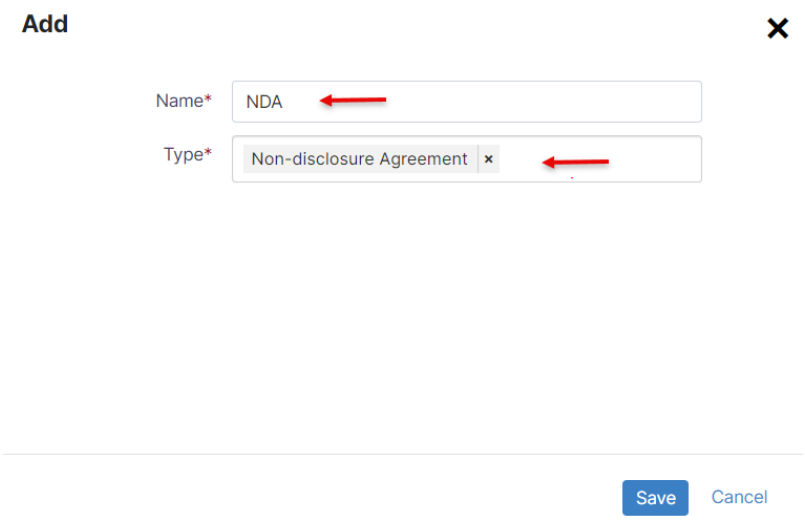
> ⚠ A default workflow (System Workflow) is used when no workflows are selected.



The actions wheel on the top right allows you to edit a workflow, or delete it

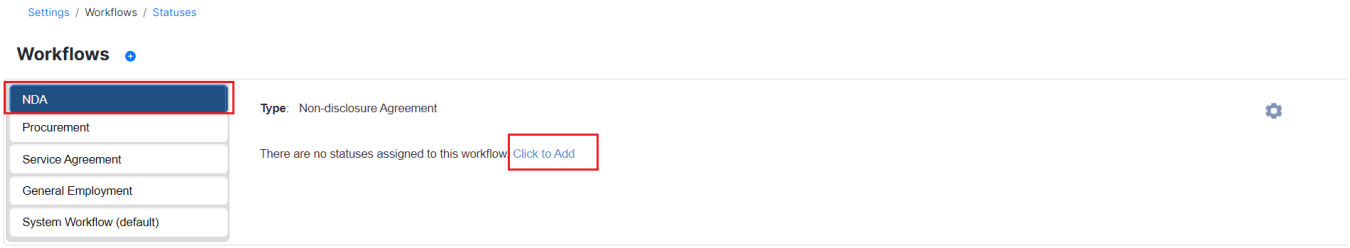
To add a new Workflow, click on the **(+)** sign next to the **Workflows**

You need to provide the name of the **Workflow** and which **Type** of agreement(s) it applies to.

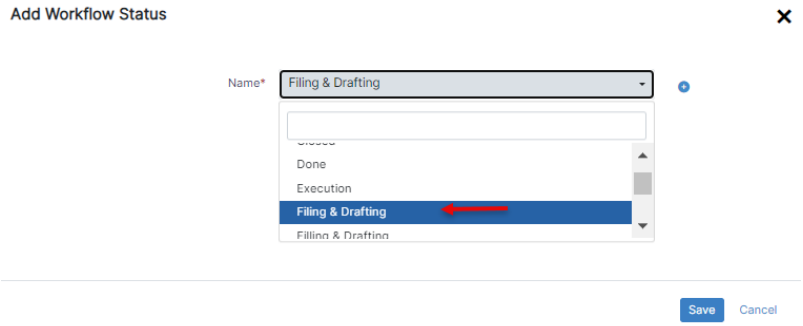


Add Workflow Statuses:

Once the new Workflow is added, you must now assign statuses to it. Therefore, **click to add** statuses

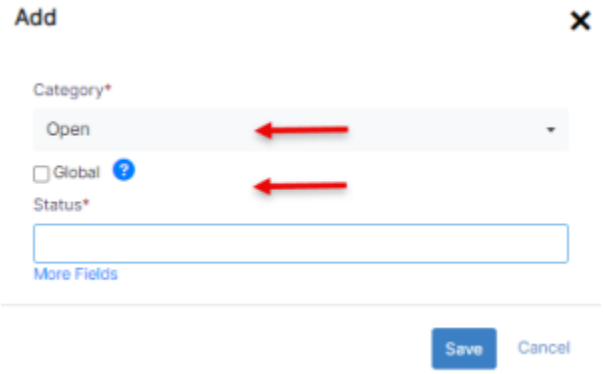


Choose from the list of predefined statuses or add new ones on the fly.



Adding a new status requires specifying some details such as its **name, category,** and **type.**

> Statuses should be nested under one of the three main categories: Open, In Progress, and Done.



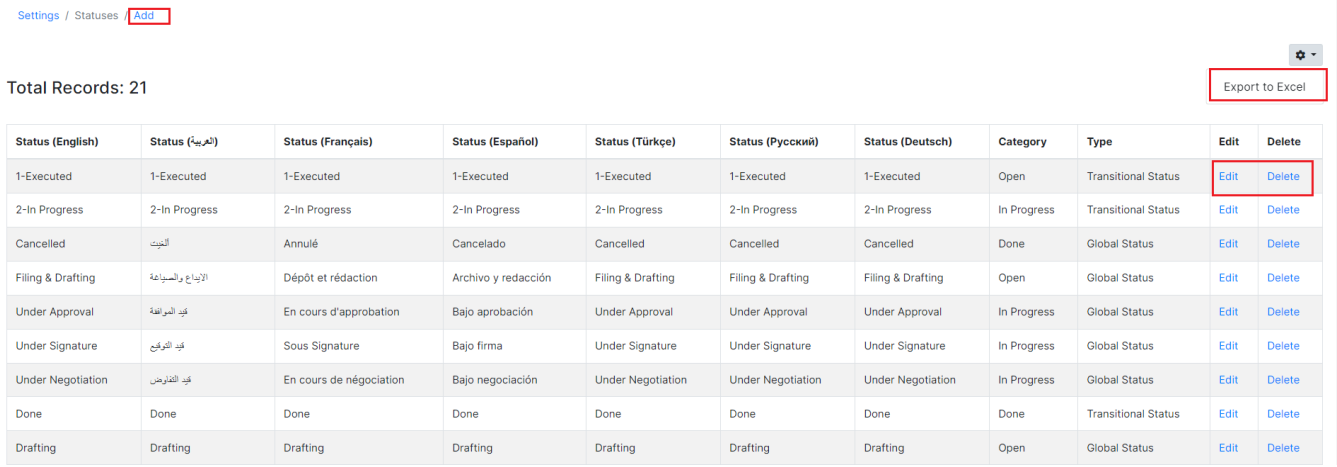
Statuses could also be **Global** or **Transitional.** By default, all the added statuses will be Transitional unless you check the Global type.

> Transitional statuses allow you to customize your workflow based on different transitional steps including transition screens, notifications, and permissions.

> Global means allowing other statuses to transition to the created status

Additionally, all workflow statuses will be listed on a separate page, that could be accessed from the **Statuses** hyperlink on the top of the page.

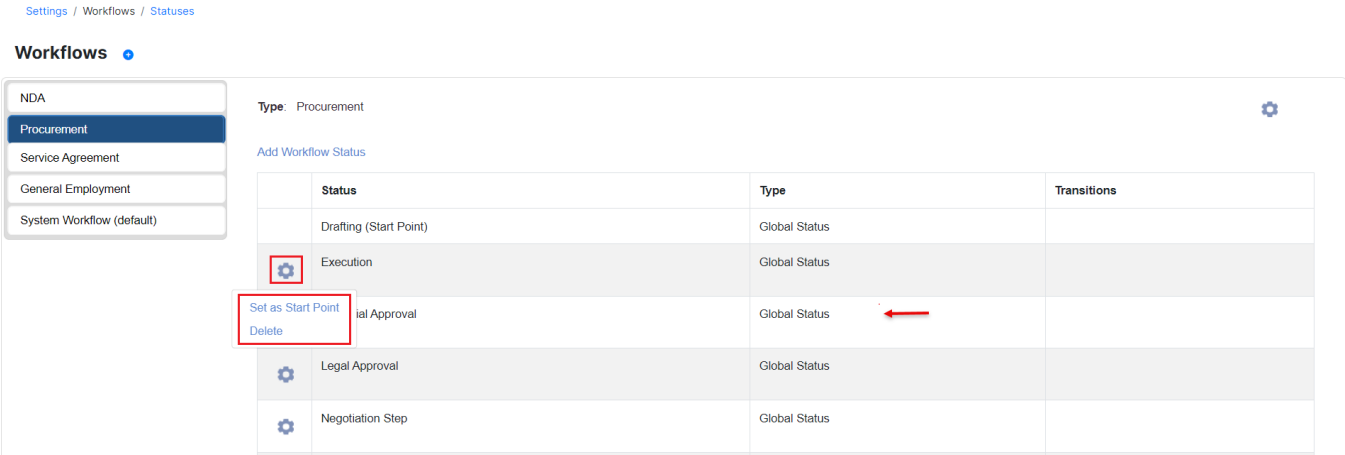
Here you can also add new statuses, edit, or delete the existing ones, and track all the statuses with their type and categories.



Status (English)	Status (العربية)	Status (Français)	Status (Español)	Status (Türkçe)	Status (Русский)	Status (Deutsch)	Category	Type	Edit	Delete
1-Executed	1-Executed	1-Executed	1-Executed	1-Executed	1-Executed	1-Executed	Open	Transitional Status	Edit	Delete
2-In Progress	2-In Progress	2-In Progress	2-In Progress	2-In Progress	2-In Progress	2-In Progress	In Progress	Transitional Status	Edit	Delete
Cancelled	الغيت	Annulé	Cancelado	Cancelled	Cancelled	Cancelled	Done	Global Status	Edit	Delete
Filing & Drafting	الايداع والصياغة	Dépôt et rédaction	Archivo y redacción	Filing & Drafting	Filing & Drafting	Filing & Drafting	Open	Global Status	Edit	Delete
Under Approval	قيد الموافقة	En cours d'approbation	Bajo aprobación	Under Approval	Under Approval	Under Approval	In Progress	Global Status	Edit	Delete
Under Signature	قيد التوقيع	Sous Signature	Bajo firma	Under Signature	Under Signature	Under Signature	In Progress	Global Status	Edit	Delete
Under Negotiation	قيد التفاوض	En cours de négociation	Bajo negociación	Under Negotiation	Under Negotiation	Under Negotiation	In Progress	Global Status	Edit	Delete
Done	Done	Done	Done	Done	Done	Done	Done	Transitional Status	Edit	Delete
Drafting	Drafting	Drafting	Drafting	Drafting	Drafting	Drafting	Open	Global Status	Edit	Delete

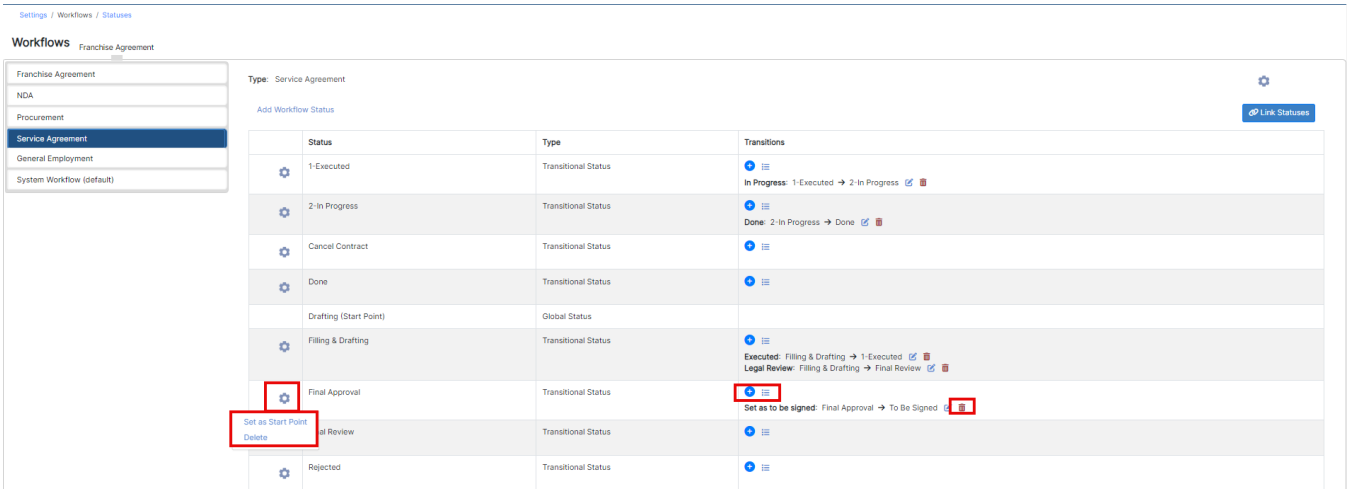
Manage Workflows:

Once adding the new Workflow, you can now manage and customize it.



Therefore, specify the starting point status, Add new transitions between the transitional statuses, list transitions, and so on.

> Start Point Status, is the first workflow status of the contract once created.



You have the option to add, view, edit, or delete transitions associated with the Transitional statuses at the status level.

> Learn more about Transitional Workflows, and how to customize your workflow **here.**

The workflows will then be automatically assigned in contracts when they match the criteria of the workflow.

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

Thank you!