How to Customize Contracts Workflows

Objectives

- Add Transitional Workflows

Steps

This guide will cover the configurable items on Workflow transitions from one status to the other.

This will be broken down in terms of Transition Screens, Notifications, Permissions, and Approvals.

Benefits of setting workflows in place:

- The legal team, Requesters, and Contributors will be up to date with their Contracts' statuses.
- Better efficiency in collaboration on the Contracts.
- Management will be updated on how the Contracts are going.
- Ability to generate SLA reports.

To do so, go the **System Settings Contracts & Documents Manage Workflows**

Choose the Workflow you want to use, or create your own.

> ✅ Learn more about how to add and manage workflows **here.**

Click on the **"+"** next to the status you want to start with and add a new transition.

Transitions are the changes that should be done in contract workflows, from one condition or status to another, but this can be managed in a way to keep the process efficient through transitional screens, notifications to the concerned people, and permissions.

To add a new transition give it a name, describe it if needed, and specify the transition from and to status.

Add Transition

Name*   Name

From Status   Final Approval

To Status*   1-Executed

Description

Screen   Notifications   Permissions   Approvals

Screen workflow:

search		search
Name		
Description		
Assigned Team		
Assignee		
Priority		
Date		

Save

Transition Screens:

On each status transition, we can enable a popup screen that will force the user to fill in certain fields. This is used to protect your data integrity, ensuring that users do not skip or forget to enter data required by our practice.

Screen   Notifications   Permissions   Approvals

Screen workflow:

search		search
		Required
Description		☑ Priority
Assigned Team		☑ Name
Assignee		
Date		
Start Date		
End Date		

Save

Notifications:

Notifications can be configured to inform the needed parties about changes in the Contracts. For example, if at a certain point, a manager needs to be informed that a contract has passed a particular stage and requires their review or approval, this can be achieved using a workflow.

Screen   Notifications   Permissions   Approvals

Notify (To)   Notify (CC)

| JonesAAlice21@gmail.com × | Includes users or external emails |

Save

Permissions:

Permissions can be set on each transition; this is used to control who has the ability to make changes in the transitions.

Screen   Notifications   **Permissions**   Approvals

Users   **User Groups**

Carolina Robinson ×   Alice Jones ×   James Marven ×   Select User Groups

Save

Approvals:

Approvals could be enabled so that the status of the contract can't be moved until the contract/document is approved by all the involved parties.

Screen   Notifications   Permissions   **Approvals**

Don't move the status until the contract/document is approved by all the involved parties. ☑ ⟵

Save

Once created you can then list and view transitions easily from the workflow page; click on the 3 lines next to the plus sign within each transitional status line.

View Transitions   ✕

Filling & Drafting

Execute...   Legal R...

1-Executed   Final Review
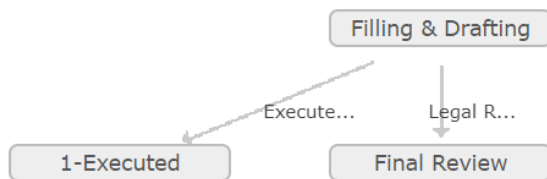
Close

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

Thank you!