

How to Configure Approval Centers

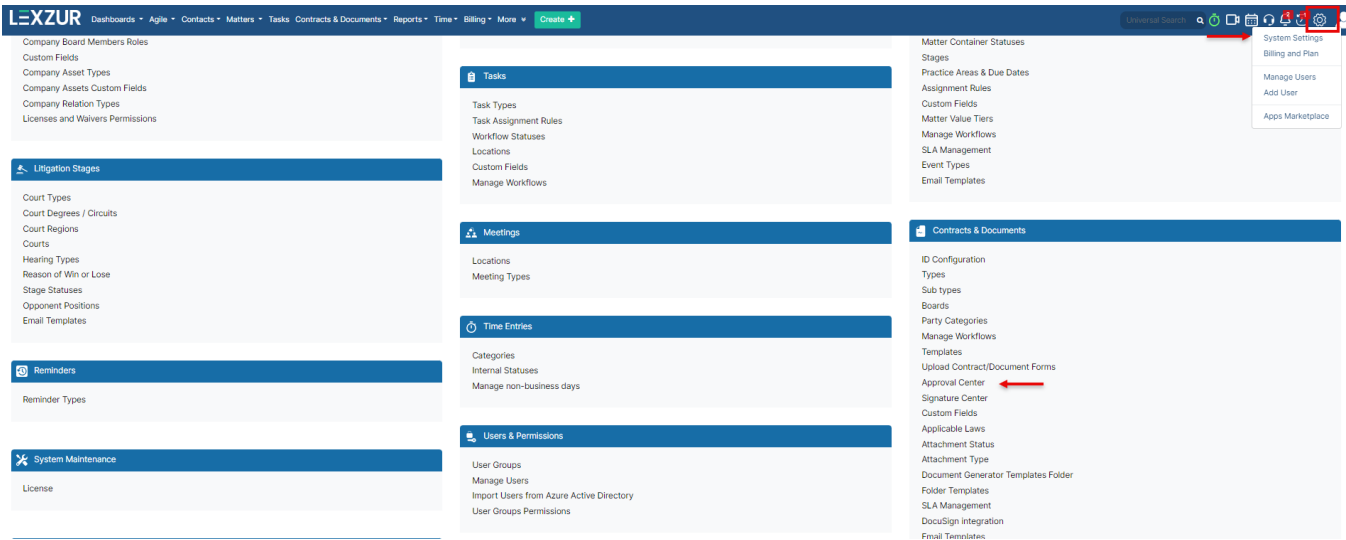
Objectives

- Automate approvers of the contract

Steps

The Approval Center in LEXZUR can be configured based on different business criteria and contract types from the system settings.

To do so, go to the System Settings, and choose **Approval Center** under the **Contract & Documents** settings part:



The list of predefined Approval Centers can be viewed here where you can add new, edit, delete, or clone existing ones.

Settings / Approval Center / Add	
Letter of Engagement	
Service Agreement	
Sales Agreement	
Franchise Agreement	
High Value Contracts	
Employment Agreement	
High Priority Contracts	

For example, if the contract is of high priority, the Head of Legal should always approve this contract in the first order.

Name:

High Priority Contracts

Specify Approval Conditions:

Use this approval process if the following conditions are met:

Field	Operator	Field value
Priority	Equal	Critical

[Add Criteria Logic](#)

Select Approvers:

Specify to whom the approval request should be assigned:

☒ Set Approver Order

Approval Order	Users/Collaborators	User Group	Assignee	Board member	Shareholder	Approval Label	Actions
1	Select Users or Collaborators Carolina Robinson (User)	Administrator	☐	☐	☐	Head of Legal Department	

[Add Approver](#)[Save](#)

Therefore, give this Approval Center a name, and start customizing it:

- Add Criteria Logic.
- Add Approvers.

The criteria you select are the conditions under which this approval center is applicable. This is based on the contract fields and their values.

Specify Approval Conditions:

Use this approval process if the following conditions are met:

Field	Operator	Field value
Priority	Equal	Critical

[Add Approver](#)

Specify Approval Conditions:

Use this approval process if the following conditions are met:

Field	Operator	Field value
Priority	Equal	Critical

[Add Criteria Logic](#)

Select Approvers:

Specify to whom the approval request should be assigned:

☒ Set Approver Order

You can add as many approvers as needed, specify the approval order, and the name of the approval, so search from the list of users or collaborators.

You can also specify additional information such as the user group required to approve, and the approval label.



The Approver Name is not required here. Therefore, you can just specify the Approval Label and specify the approvers later on from each contract's page.

Contracts can also be approved by board members or shareholders if they have collaborator access.

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

Thank you!