

How to Configure Signature Centers

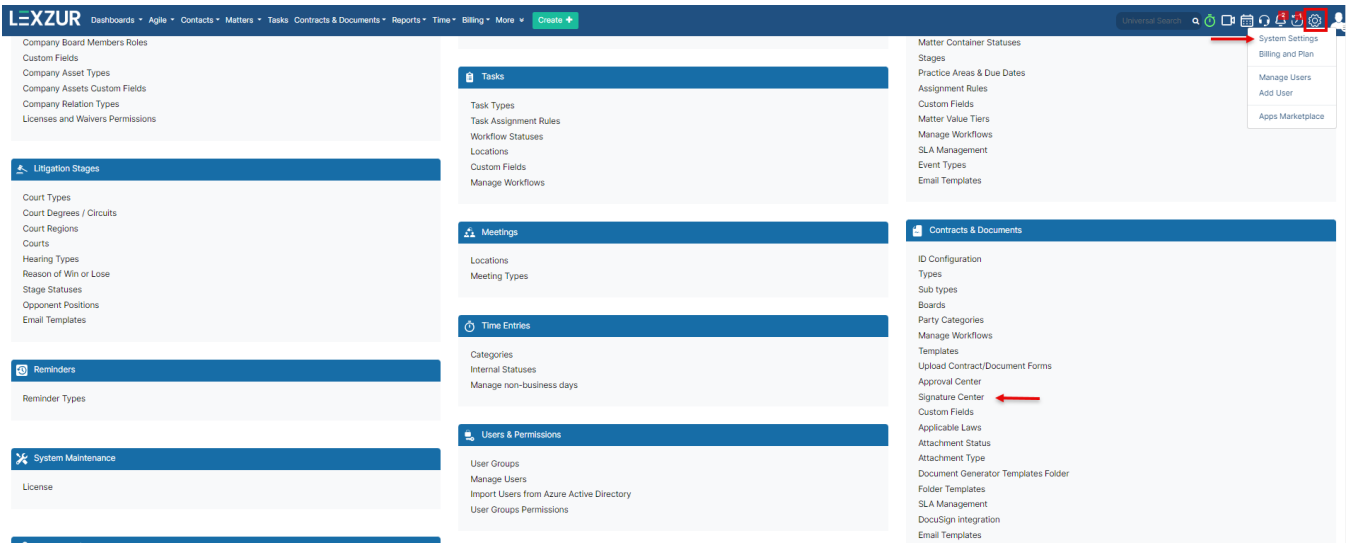
Objectives

- Automate signees of the contract

Steps

The Signature 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 **Signature Center** under the **Contract & Documents** settings part:



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

Settings / Signature Center / Add	
NDA	  
Employment Agreement	  
Sales Agreement	  
High Priority Contracts	  
High Value Contracts	  

For example, if the contract value is higher than 1000000, the Head of Finance should always sign this contract in the first order.

Settings / Signature Center / Add

Name: ←

High Value Contracts

Specify Signature Conditions: ←

Use this signature process if the following conditions are met:

Field	Operator	Field value
Value	>=	1000000

Add Criteria Logic

Select Signees: ←

Specify to whom the signature request should be assigned:

☒ Set Signature Order

Signature Order	Type	Signees	Label	Actions
1	Users	Carolina Robinson	Head of Finance	

Add Signee

Save

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

- Add Criteria Logic.
- Add Signee.

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

Specify Signature Conditions:

Use this signature process if the following conditions are met:

Field ←

Value

None

Type

Sub type

Value

Priority

Party

Assignee

Assigned Team

Requester

Category

Date

Start Date

End Date

Company Name

Operator

Equal

Equal

Not equal

<

<=

>

>=

You can add as many signees as needed, set the signature order, and specify the type and the name of the signee, and the label as well.

Select Signees:

Specify to whom the signature request should be assigned:

☒ Set Signature Order

Signature Order	Type	Signees	Label	Actions
1	Users	Carolina Robinson	Head of Finance	

Add Signee

Save

Users

Collaborators

User Groups

Persons

Board member

Shareholder

Contracts can also be signed 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!