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:

LEXZUR Deshboards - Agile - Contacts - Matters - Tasks Contracts & Documents - Report	s • Time • Billing • More • Create +		o 🗅 🗇 🛱 🖓 🔕 💄
Company Board Members Roles		Matter Container Statuses	System Settings
Custom Fields		Stages	Billing and Plan
Company Asset Types	a Tasks	Practice Areas & Due Dates	Manage Users
Company Assets Custom Fields		Assignment Rules	Add User
Company Relation Types	Task Types	Custom Fields	
Licenses and Waivers Permissions	Task Assignment Rules	Matter Value Tiers	Apps Marketplace
	Workflow Statuses	Manage Workflows	
	Locations	SLA Management	
▲ Litigation Stages	Custom Fields	Event Types	
	Manage Workflows	Email Templates	
Court Types			
Court Degrees / Circuits			
Court Regions	A Meetings	Contracts & Documents	
Courts			
Hearing Types	Locations	ID Configuration	
Reason of Win or Lose	Meeting Types	Types	
Stage Statuses		Sub types	
Opponent Positions		Boards	
Email Templates	Ch. Time Entries	Party Categories	
	U Time Litures	Manage Workflows	
	Categories	Templates	
Reminders	Internal Statuses	Upload Contract/Document Forms	
	Manage non-business days	Approval Center	
Reminder Types		Signature Center	
		Custom Fields	
	A House & Branchasters	Applicable Laws	
	Sers & Permissions	Attachment Status	
🔀 System Maintenance	Liear Groupe	Attachment Type	
	Managa Llagra	Document Generator Templates Folder	
License	Import Licers from Azuro Active Directory	Folder Templates	
	Liear Groupe Barmierione	SLA Management	
	Oper Groups Ferritoprote	DocuSign integration	
		Email Templates	

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

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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 Lusers	*	Carolina Robinson	✓ Head of Finance	ā
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:	Operator	
Use this signature process if the following conditions are met:		
Field 😧	Equal	-
Value -		
None	Equal	
Туре		
Sub type	Not equal	
ç. Value		
s Priority	<	
Party		
Assignee	<=	
Assigned Team		
Requester	_ >	
Category		
Date	>=	
A Start Date		
End Date		
Company Name		

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 reque	st should be assigned:			
Set Signature Order				
Signature Order	Туре	Signees	Label	Actions
II 1	LUsers ·	Carolina Robinson -	Head of Finance	ā
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!