

How to Share Contracts & Collaborate with External Parties

Objectives:

- Share contracts with collaborators to approve/sign
- Share contracts with external parties to sign

Steps:

LEXZUR offers a seamless solution for sharing contracts and collaborating with external parties.

Share Contracts with Collaborators:

You can easily share contracts with collaborators for their review, signature, and approval.

To do so, open the contracts page, and from the **Approval** and **Signature** centers add your collaborators respectively.

Choose the **Collaborator** type, and specify his/her name in the next field.

Edit Approvers

Set Approver Order

Collaborators

- Users
- Collaborators**
- User Groups
- Assignee
- Board member
- Shareholder

Albert Smith

Carolina Robinson

Similarly, add the collaborator as a signee.

Edit Signees

Set Signature Order

Collaborators

- Users
- Collaborators**
- User Groups
- Persons
- Board member
- Shareholder

Albert Smith

Select Users



Collaborators could be external partners, stakeholders, or other relevant parties who can actively engage in the contract process through the LEXZUR client portal. They participate in reviewing, discussing, providing input, accessing necessary documents, and contributing to the contract's approval and signature.

Collaborators will receive notifications to promptly review and can conveniently access their assigned contracts through the client portal.

The screenshot shows a Gmail inbox with 90 messages. A specific email from 'Lexzur <noreply@app4legal.com>' is selected, titled 'Lexzur - PUA-457-Purchase Agreement for ABC Awaiting Approval'. The email body contains an 'Activity Alert' section with the message 'Hello' and a red arrow pointing to the link 'PUA-457 - "Purchase Agreement for ABC" needs your approval'. Below this is an 'Action' section with the instruction 'Click this button to swiftly proceed and take action within Lexzur.' and a red-bordered 'Approve/Reject' button.

They can easily approve/reject contracts via the received email or click on the contract ID to open it from the client portal

The screenshot shows a Gmail inbox with 90 messages. A specific email from 'Lexzur <noreply@app4legal.com>' is selected, titled 'Lexzur - SEA-463-Service Agreement for BC Awaiting Signature'. The email body contains an 'Activity Alert' section with the message 'Hello' and a red arrow pointing to the link 'SEA-463 - "Service Agreement for BC" is awaiting signature.'. Below this is a 'Details' section showing contract information: Id (SEA-463), Name (Service Agreement for BC), Type (Service Agreement), Priority (Medium), and Party 1 (Branding Company (company)).

All the contracts shared with them will be accessible from the client portal.



PUA-457 Purchase Agreement for ABC

Export ▾

Home

Contracts / Agreement

Details

Attachments

Approval Center

Signature Center

Approval Criteria :

Approval Status : Awaiting Approval

1 Carolina Robinson Awaiting Approval

Head of Legal Department

Show Summary

Open Contract/Document

1 Albert Smith Awaiting Approval

Show Summary

Open Contract/Document



From the Approval Center, a collaborator can open the contract to review, start a negotiation, approve or reject.



SEA-463 Service Agreement for BC

Export ▾

Home

Contracts / Agreement

Details

Attachments

Approval Center

Signature Center

Signature Criteria:

Signature Status : Awaiting Signature

1 Alice Jones Signed

CEO

Show Summary

Open Contract/Document

2 Albert Smith Awaiting Signature

Show Summary

Open Contract/Document



Similarly, they can sign contracts from the Signature Center based on the defined signature workflow.

Share Contracts with External Parties:

Moreover, you can share documents with external parties and provide them with access to edit or view documents, as required.

To do so, open the **attachments** tab, select the needed document then click **Share with**

The screenshot shows the 'Attachments' section for contract CT291. On the left, a sidebar lists various project management and document-related modules. The 'Attachments' module is highlighted with a red box. The main area displays a file list titled 'CT291' with two documents: 'Consultancy Agreement.docx' and 'Doc120211130161100.docx'. The 'Share with' button is also highlighted with a red box.

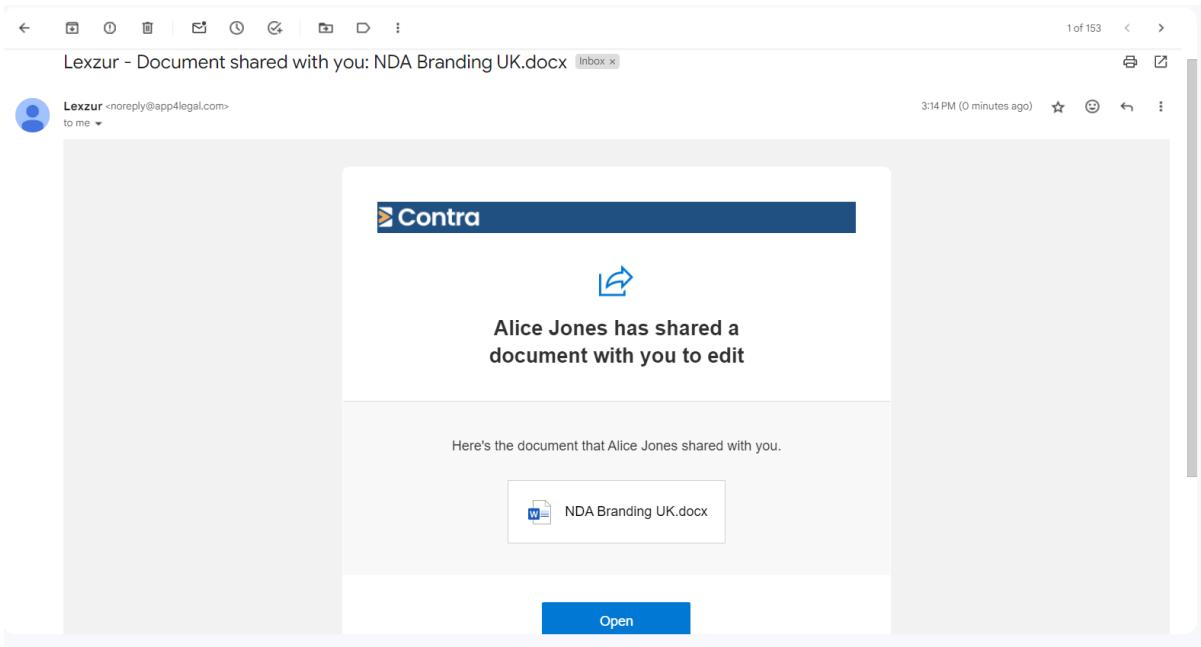
Name	Type	Status	Keywords	File Size	Added On	Added By
Consultancy Agreement.docx	Word Document	Completed	Green checkmark	22.1 kB	2023-06-19 13:10:48	Carolina Robins...
Doc120211130161100.docx	Word Document	Completed	Green checkmark	19.6 kB	2023-06-19 10:08:44	Carolina Robinson

Simply enter the person's email address and add them as external users to the document. Additionally, you have the option to specify the type of permission granted, allowing them either editing capabilities or restricted access for viewing purposes only.

The screenshot shows the 'Attachments' section for contract CT434. The sidebar includes the same set of modules as the previous screenshot. The 'Attachments' section is shown with a file list titled 'CT434' containing 'legal files.docx' and 'NDA Branding UK.docx'. A search bar 'Search CT434' is visible above the list.

Name	Type	Status	Keywords	File Size	Added On	Added By
legal files.docx	Word Document	Completed	Green checkmark	25.6 kB	2024-01-11 19:17:16	Julia Marven
NDA Branding UK.docx	Word Document	Completed	Green checkmark	19.7 kB	2024-01-11 17:23:29	Alice Jones

This facilitates efficient collaboration and ensures that all stakeholders can contribute to the document's progress.



Additionally, you can request external parties to sign documents electronically, streamlining the signing process and eliminating the need for physical signatures.

You can do so directly while adding the contract signees. Therefore, choose the **Person** type, and search for contacts in your database.

 Make sure to include the person's email address in the contact information for convenient retrieval and accessibility.

Edit Signees



Set Signature Order

 Collaborators	Albert Smith	
		
 Persons	Adam Christopher (ademchristopherr@gmail.com)	
		

+ Add Signee

 Save  Cancel

From the system, you have the capability to manage the signature process of external parties. When their signature is needed, you can send them an email request to sign the required document.

CT291 - Adam Consultancy Agreement

Cancelled Executed Under Approval More Active

Signature Criteria:
Signature Status: Awaiting Signature
(App4Legal Signature Workflow) Change to Adobe Sign Workflow Change to Emdha Workflow

Edit Signees

1 Albert Smith Awaiting Signature
 Show Summary Open Contract/Document

1 Adam Christopher Awaiting Signature
 Show Summary Open Contract/Document

Request to sign

Signature History:

By	Action	From	To	On	Signature Label	Comment
Carolina Robinson		None		2023-06-19 14:07:03	-	Signature workflow changed from Adobe Sign to App4Legal Signature

Choose the contract to be signed, and customize your email for the recipient.

Request to sign with DocuSign

Choose the contract/document to be signed by Adam Christopher

File	Last Signed By	Last Signed On
<input checked="" type="checkbox"/> Consultancy Agreement.pdf		

Customize your email for the recipient.

Subject: *

Consultancy Agreement Signature

Message

Dear,

Please sign the following document

Send Cancel



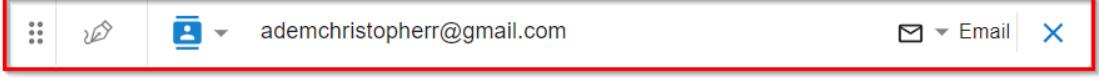
The process may vary depending on the signature workflow utilized. If you are using DocuSign, you will send a request to sign via DocuSign, which requires adding the required fields through your DocuSign account. On the other hand, if you are using Adobe, you can directly add signees, including external individuals, customize the message, and send the request seamlessly.

Edit Signees

Recipients*

Complete in Order Complete in any Order [Add Me](#)


albertsm052@gmail.com [Email](#) [X](#)


ademchristopherr@gmail.com [Email](#) [X](#)


[Email](#)

[Show CC](#)

Message* 

Document Signature

Please review and complete Doc120211130161100

Files* 

 Consultancy Agreement.pdf [Delete](#)

[ADOBE SIGN LOGOUT](#) [Save as Draft](#) [Send](#) 

With these features, LEXZUR simplifies contract sharing, enhances collaboration, and promotes efficient communication with external parties.

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

Thank you!