

# How to Configure Approval or Signature Centers Based on Roles

## Objectives

- [Add Approvers and Signees based on Client portal user's Roles](#)
- [Automate Approval and Signature Centers based on client portal user's Roles](#)

## Steps

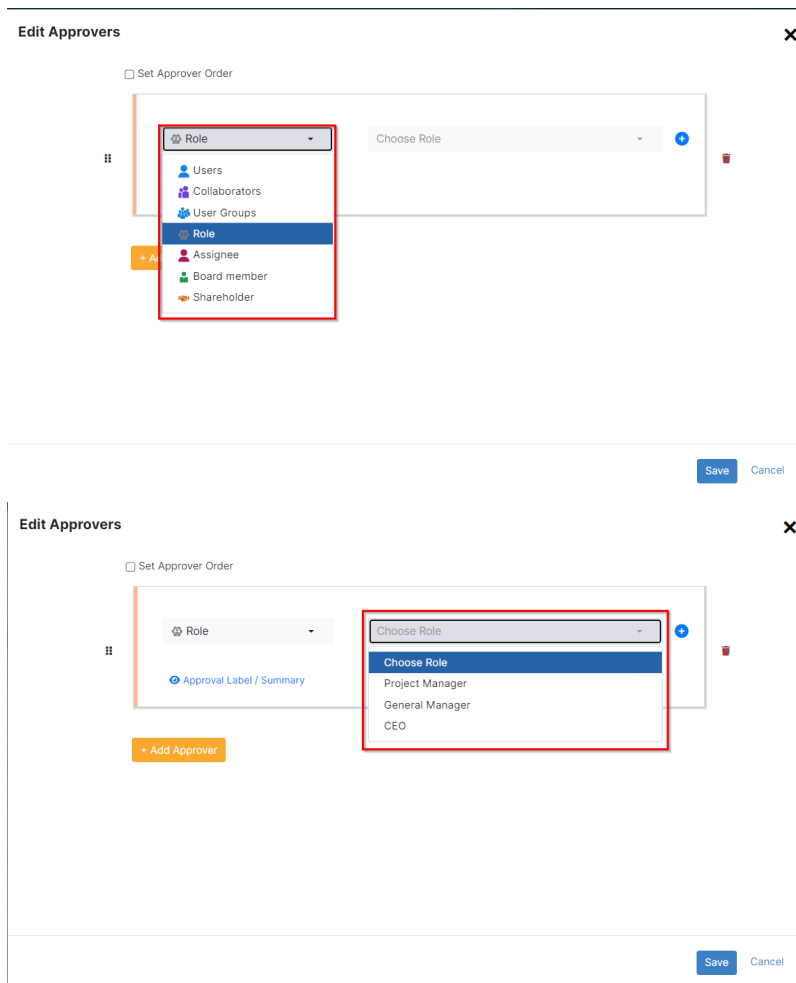
Configuring signature and approval centers based on roles is an essential aspect of efficient workflow management.

By considering the Business Unit and Department of each requester, you can determine the appropriate Approval Center and Signature Center to be utilized. For instance, roles such as Line Manager, Legal Review, Finance, General Manager, and more can be established, each with specific responsibilities and authority levels. This ensures that the right individuals are involved in the approval and signature processes.

 [Learn more about how to Configure Roles \*\*here\*\*.](#)

### Add approvers and signees:

- Open the contract requested by the client Portal and access the approval center.
- Adding an approver based on a role is similar to adding any other approver. Simply select the "Role" option as the type of approver and choose the desired role from the list of predefined roles available in the settings.




The screenshot displays the 'Edit Approvers' interface, which includes a close button (X) in the top right corner. At the top left, there is a checkbox labeled 'Set Approver Order'. The main area features a list of roles: 'Role' (selected), 'Users', 'Collaborators', 'User Groups', 'Assignee', 'Board member', and 'Shareholder'. A red box highlights the 'Role' dropdown menu. To the right of the dropdown is a 'Choose Role' field with a plus icon. Below the role list, there is an 'Approval Label / Summary' field and an '+ Add Approver' button. At the bottom right, there are 'Save' and 'Cancel' buttons.

- Additionally, you can assign an approver label or summary for clarity.
- Multiple approvers can be added under the "Roles" type, allowing for flexibility in the approval process.
- Set the approval permissions if needed.






**Contracts & Documents**

ID Configuration  
Types  
Sub types  
Boards  
Party Categories  
Manage Workflows  
Templates  
Upload Contract/Document Forms  

Approval Center  
Signature Center

Custom Fields  
Applicable Laws  
Attachment Status  
Attachment Type  
Document Generator Templates Folder  
Folder Templates  
SLA Management  
DocuSign integration

Click to add a new approval center

Settings / Approval Center [Add](#)

Letter of Engagement			
Service Agreement			
Sales Agreement			
Franchise Agreement			
Employment Agreement			
High Priority Contracts			
Procurement Agreement			
High Value Contracts			
Business Department Approval			

Give it a name, and specify the approval conditions, you can add as many criteria as needed, for example, according to the contract type, value, priority, and so on.

Then select the approvers. Here specify the **Role** of the approver and the approval label.

You can add all the approvers involved directly from here, and set the order if needed.

**Name:**

**Specify Approval Conditions:**  
Use this approval process if the following conditions are met:

Field	Operator	Field value
Type	Equal	Partnership Agreement, Reselling Agreement
Priority	Equal	High

[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	Role	Approval Label*	Actions
# 1	<input type="text" value="Select Users or Collaborators"/>	<input type="text" value="Select User Groups"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Project Manager	Project Manager	

[Add Approver](#)

Similarly, open the **Signature Center**, and indicate the signees as well.

[Settings](#) / [Signature Center](#) / [Add](#)

**Name:**

**Specify Signature Conditions:**  
Use this signature process if the following conditions are met:

Field	Operator	Field value
Type	Equal	Partnership Agreement, Reselling Agreement
Priority	Equal	High

[Add Criteria Logic](#)

**Select Signees:**  
Specify to whom the signature request should be assigned:

☒ Set Signature Order

Signature Order	Type	Signees	Label	Actions
# 1	Role	General Manager	General Manager	

[Add Signee](#)

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!