

# 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 ▾

Albert Smith ✕ ← +

Users

Collaborators →

User Groups

Assignee

Board member

Shareholder

Carolina Robinson ✕ +

Similarly, add the collaborator as a signee.

**Edit Signees** ✕

Set Signature Order

Collaborators ▾

Albert Smith ←

Users

Collaborators →

User Groups

Persons

Board member

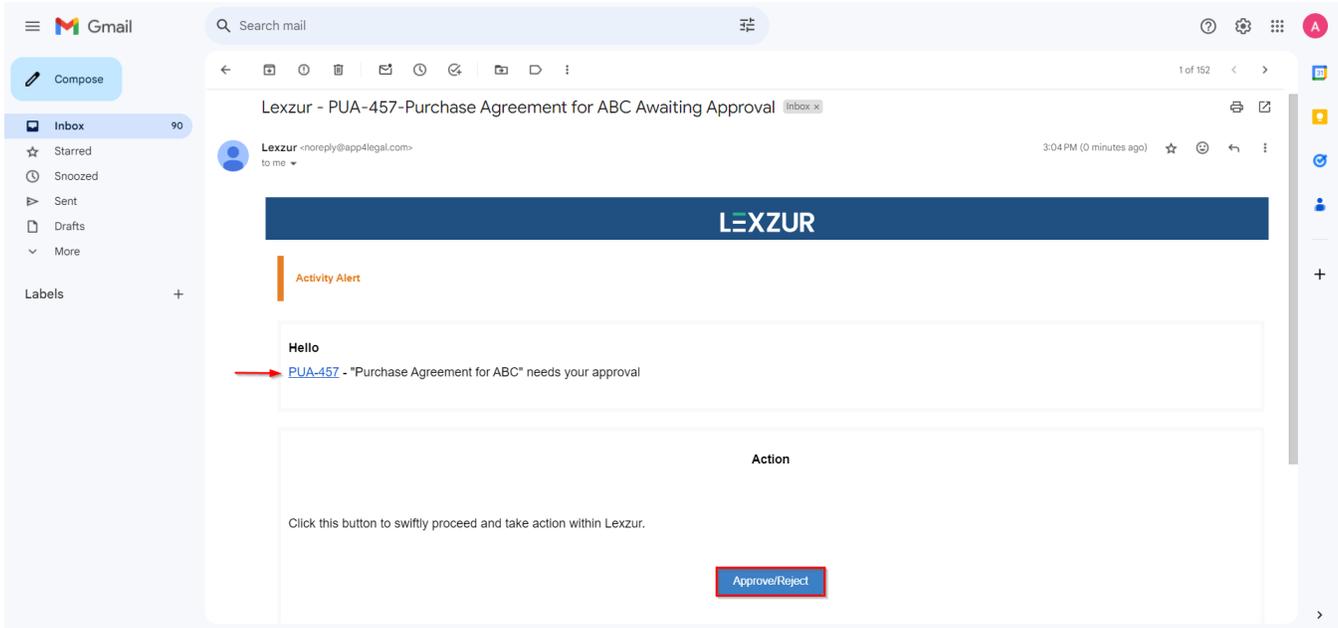
Shareholder

Select Users ▾

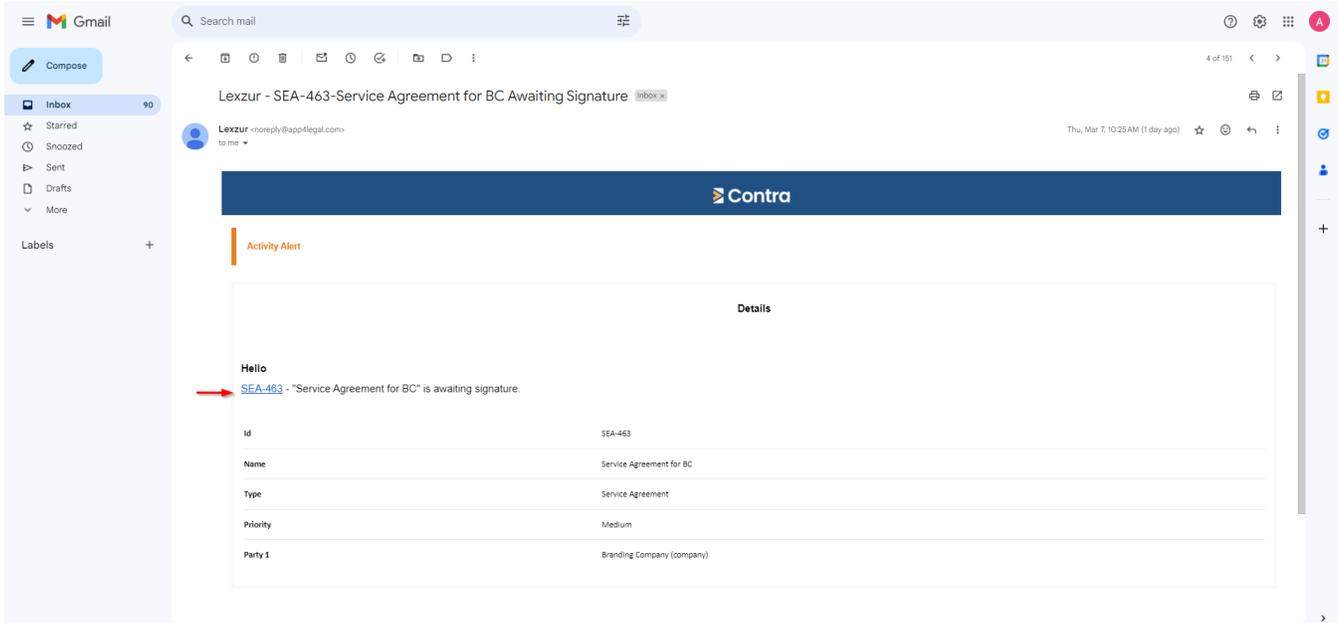


Collaborators could be external partners, stakeholders, or other relevant parties who can actively engage in the contract process through the LEXZUR client portal. They participate in reviewing, discussing, providing input, accessing necessary documents, and contributing to the contract's approval and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

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



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



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

**LEXZUR** 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 <span style="background-color: #f4a460; border-radius: 5px; padding: 2px;">Awaiting Approval</span> | Head of Legal Department | <a href="#">Show Summary</a> | <a href="#">Open Contract/Document</a> | <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">ⓘ</span> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">✔</span> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">✘</span> |
| 1 | Albert Smith <span style="background-color: #f4a460; border-radius: 5px; padding: 2px;">Awaiting Approval</span>      |                          | <a href="#">Show Summary</a> | <a href="#">Open Contract/Document</a> | <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">ⓘ</span> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">✔</span> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">✘</span> |

Signature | Change Password | Help | Out of Office | Albert Smith

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

**LEXZUR** 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 <span style="background-color: #28a745; border-radius: 5px; padding: 2px;">Signed</span>              | CEO | <a href="#">Show Summary</a> | <a href="#">Open Contract/Document</a> |   |
| 2 | Albert Smith <span style="background-color: #f4a460; border-radius: 5px; padding: 2px;">Awaiting Signature</span> |     | <a href="#">Show Summary</a> | <a href="#">Open Contract/Document</a> | <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">ⓘ</span> <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px;">✘</span> |

Signature | Change Password | Help | Out of Office | Albert Smith

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**

CT291 - Adam Consultancy Agreement

Cancelled Executed Under Approval More Active

App4Legal Documents Google Drive SharePoint OneDrive Dropbox

Download Rename Open in Move Copy Link **Share with** List versions Show in Client Portal Convert to PDF

1 Selected

CT291

| Name   | Type          | Status | Keywords | File Size | Added On            | Added By           | Modified |
|--|---------------|--------|----------|-----------|---------------------|--------------------|----------|
| <input checked="" type="checkbox"/> Consultancy Agreement.docx | Word Document | ✓      |          | 22.1 kB   | 2023-06-19 13:10:48 | Carolina Robins... | Carolinn |
| Doc120211130161100.docx  | Word Document | ✓      |          | 19.6 kB   | 2023-06-19 10:08:44 | Carolina Robinson  | Carolinn |

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.

site.app4legal.com/7691/modules/contract/contracts/view/434/

Contra Dashboards Agile Contacts Matters Tasks Contracts & Documents Reports Time Billing More Create + Universal Search

CT434 - Non Disclosure Agreement for Branding ... Public

Closed Executed Filing & Drafti... More Active

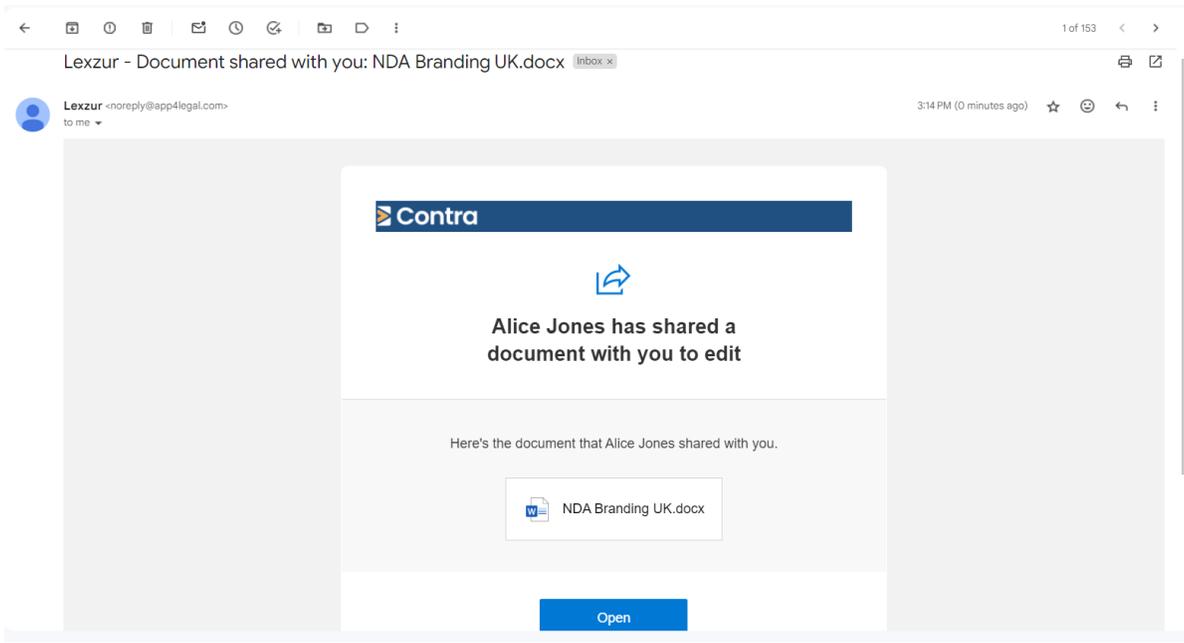
Lexzur Documents Google Drive OneDrive Dropbox

+ New Upload Search CT434

CT434

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

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

Label / Summary

Persons Adam Christopher (ademchristopherr@gmail.com)

Adam Skims (AdamSkims@outlook.com)

Adam David (Adam.david@Blackline.com)

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

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- Details
- Attachments
- Approval Center
- Signature Center
- Milestones
- Tasks
- Time Entries
- Expenses **New**
- Emails **New**
- Reminders
- Matters
- Related Contracts/Documents

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<br>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"/> <a href="#">Consultancy Agreement.pdf</a> |                |                |

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\*** Add Me

Complete in Order  **Complete in any Order**

⋮ ✍ 👤 albertsm052@gmail.com ✉ Email ✕

⋮ ✍ 👤 ademchristopherr@gmail.com ✉ Email ✕

⋮ ✍ 👤 ✉ Email

[Show CC](#)

**Message\*** ←

Document Signature

Please review and complete Doc120211130161100

**Files\*** ←

📄 Consultancy Agreement.pdf 🗑

[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](mailto:help@lexzur.com).

Thank you!