

## 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

✕

+

[Approval Label / Summary](#)

+ Add Approver

Save

Cancel

Similarly, add the collaborator as a signee.

### Edit Signees

☐ Set Signature Order

Collaborators

Users

Collaborators

User Groups

Persons

Board member

Shareholder

Albert Smith

Label / Summary

Select Users

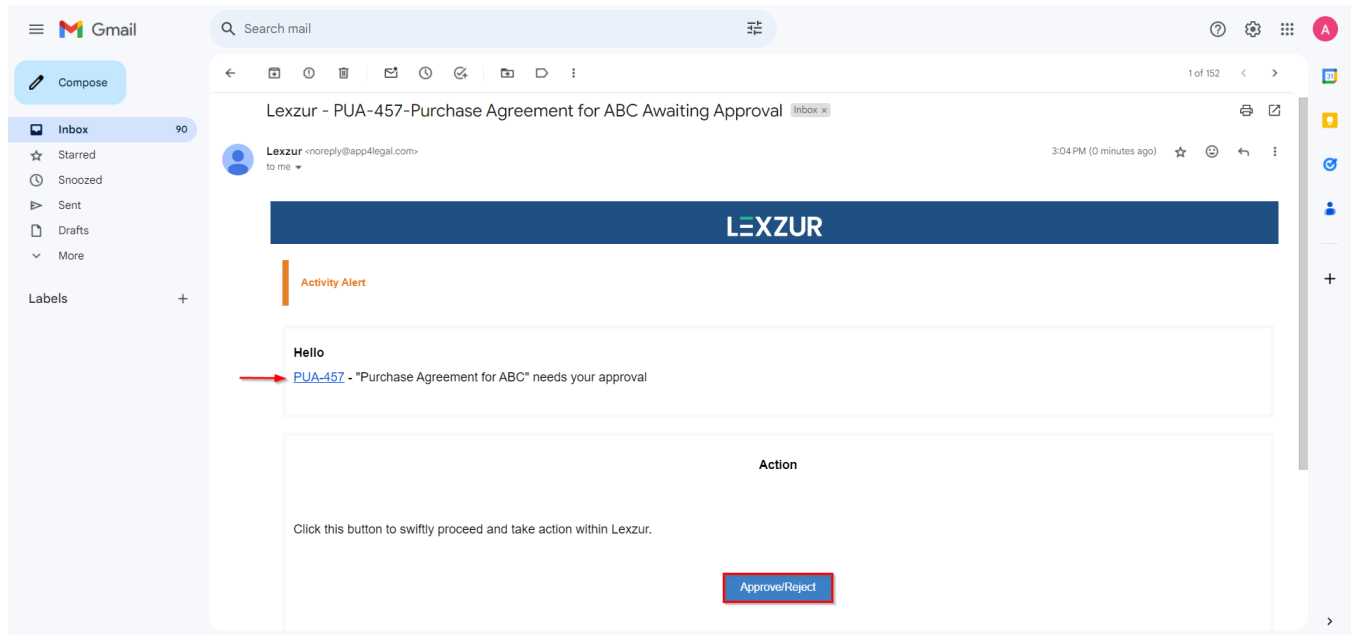
+ Add Signee

Save Cancel

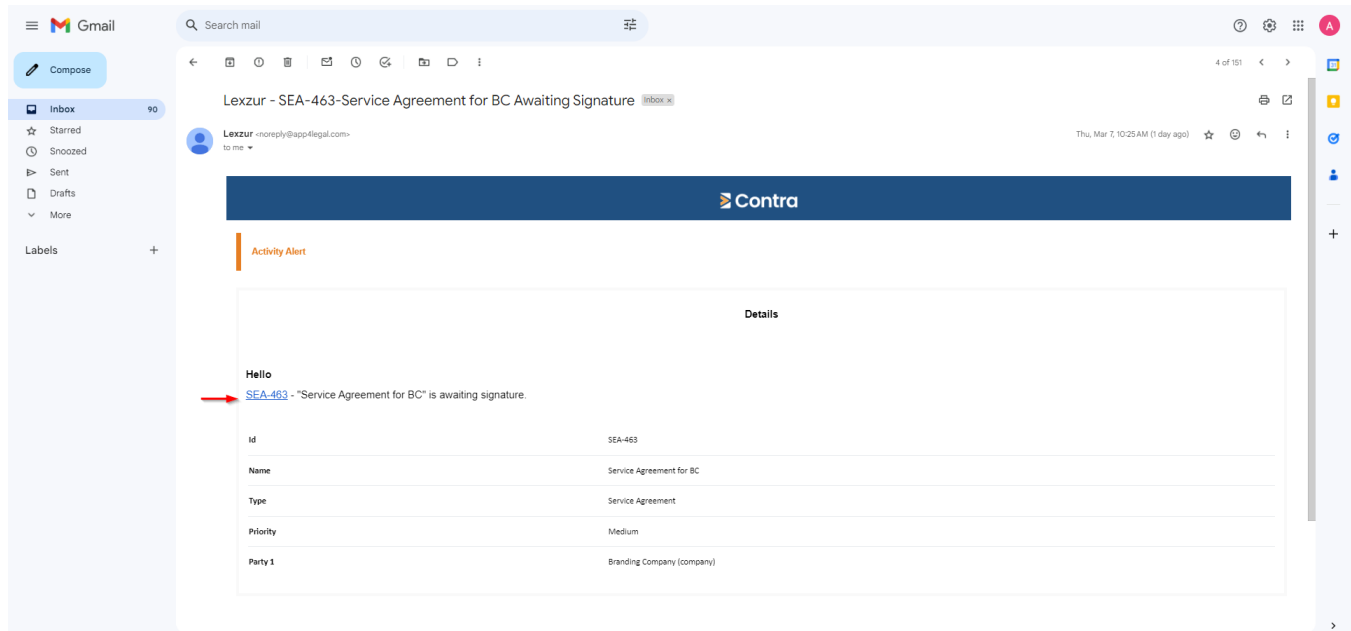


Collaborators could be external partners, stakeholders, or other relevant parties who can actively engage in the contract process through the LEXZUR client portal. They participate in reviewing, discussing, providing input, accessing necessary documents, and contributing to the contract's approval and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

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[Home](#)

Contracts / Agreement

PUA-457 Purchase Agreement for ABC

Export

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

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.

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Contracts / Agreement

SEA-463 Service Agreement for BC

Export

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

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**

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CancelledExecutedUnder ApprovalMoreActive

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses

Emails

Reminders

Matters

Related Contracts/Documents

Settings

App4Legal DocumentsGoogle DriveSharePointOneDriveDropbox

DownloadRenameOpen inMoveCopy LinkShare withList versionsShow in Client PortalConvert to PDF

Delete

CT291

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modifie
<div><div></div><div></div></div>	Consultancy Agreement.docx		<div></div>		22.1 kB	2023-06-19 13:10:48	Carolina Robins...	Carolin
<div><div></div><div></div></div>	Doc120211130161100.docx		<div></div>		19.6 kB	2023-06-19 10:08:44	Carolina Robinson	Carolin

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/

Paused

Contra

DashboardsAgileContractsMattersTasksContracts & DocumentsReportsTimeBillingMoreCreate

Universal Search

CT434 - Non Disclosure Agreement for Branding ...

ClosedExecutedFiling & Drafti...MoreActive

Attachments

Approval Center

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Milestones

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Emails

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Expenses

Reminders

Matters

Related Contracts/Documents

Settings

Lexzur DocumentsGoogle DriveOneDriveDropbox

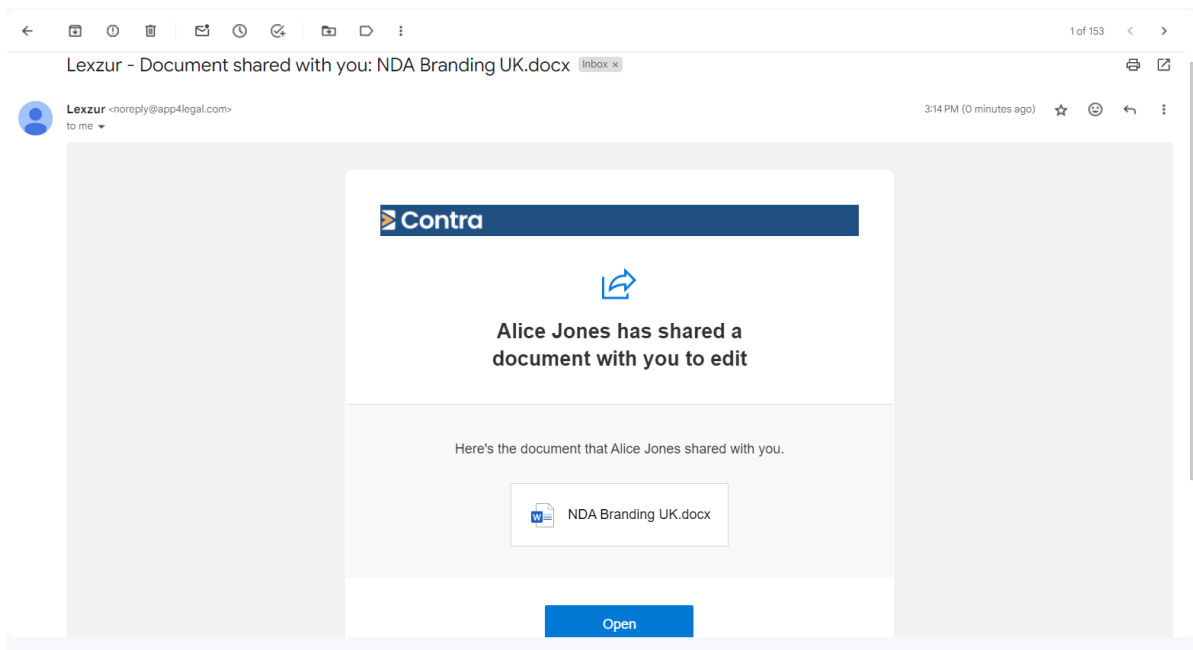
+ NewUpload

Search CT434

CT434

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modifi
<div><div></div><div></div></div>	legal files.docx		<div></div>		25.6 kB	2024-01-11 19:17:16	Julia Marven	Alice .
<div><div></div><div></div></div>	NDA Branding UK.docx		<div></div>		19.7 kB	2024-01-11 17:23:29	Alice Jones	Alice .

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)

Label / Summary

+ 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.

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Cancelled Executed Under Approval More Active

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 Emidha 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

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!