

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 image displays two screenshots of the 'Edit Approvers' interface. The top screenshot shows the 'Role' dropdown menu with options: Users, Collaborators, User Groups, Role (selected), Assignee, Board member, and Shareholder. The bottom screenshot shows the 'Choose Role' dropdown menu with options: Choose Role (selected), Project Manager, General Manager, and CEO. Both screenshots include 'Save' and 'Cancel' buttons at the top right and bottom right.

- 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.

Edit Signees

☒ Set Signature Order

4

⚙️ Role

General Manager

Label / Summary

5

⚙️ Role

CEO

Label / Summary

+ Add Signee

Save Cancel

Once saved, the system will automatically substitute the specified roles with the respective users' names, guaranteeing the participation of the relevant individuals in the signature process as well.

CT296 - Employment Agreement-Sam Farmer

Done

Executed

In Progress

Active

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses

Emails

Reminders

Signature Criteria:

Signature Status: Awaiting Approval

(App4Legal Signature Workflow) [Change to Adobe Sign Workflow](#) [Change to Emdha Workflow](#) [Change to App4Legal Sign Workflow](#)

Edit Signees

4

Albert Smith

Pending

Show Summary

Open Contract/Document

5

Micheal Cavin

Pending

Show Summary


Open Contract/Document

Signature History:

Automate Approval and Signature Centers:

You also have the ability to automate your approval center and signature center by configuring them to assign approvers and signees automatically based on roles, eliminating the need for manual addition. This can be achieved using specific criteria logic to determine the appropriate individuals for each role.

Therefore, go to the **system settings contracts & documents approval center**


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: Business Department Approval

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	Select Users or Collaborators	Select User Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Project Manager	Project Manager	

[Add Approver](#)

[Save](#)

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

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

Name: Business Department Signature

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](#)

[Save](#)

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

Thank you!