

How to Link Workflow Statuses to Approval and Signature Center Statuses

Objectives

- Connect contra workflow statuses to initiate the approval and signature center

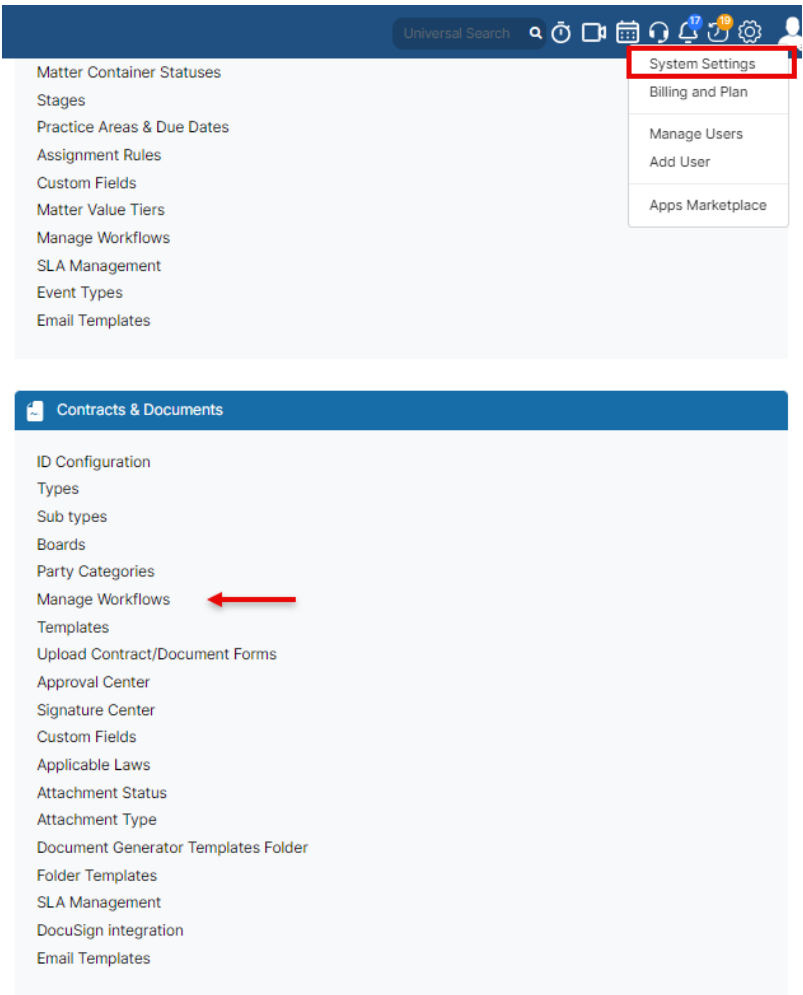
Steps

Contra users now have the ability to connect Workflow Statuses with Approval and Signature Center Statuses. This means that Workflow Statuses can now trigger the initiation of approvals and signatures.

For Example, when the status of a contract is changed from "In Progress" to "Under Approval," the approval process will automatically begin. Once all approvals are completed, the contract status will automatically transition to "Under Signature." Finally, when the contract is signed, the status will be updated to "Executed." This streamlined process ensures efficient management and tracking of contract progress within Contra.

This featured should be enabled at the level of each workflow.

Therefore, open the **System Settings Contracts & Documents Manage Workflows**



On this page, select the workflow you need to use, and you have two options to **Link Statuses** or **Unlink Statuses**.

Unlink Statuses: Contracts will be automatically updated to return to the "awaiting approval" status If the link status is deactivated while the approval /signature centers have not yet started.

Link Statuses:

Workflows

Franchise Agreement	Type: Franchise Agreement	
NDA		
Procurement		
Service Agreement		
General Employment		
System Workflow (default)		

Status	Type	Transitions
1-Executed	Transitional Status	
Cancel Contract	Transitional Status	Under Review: Cancel Contract → Under Review 1
New Request (Start Point)	Transitional Status	Assign for review: New Request → Under Review 1 Cancelled: New Request → Cancel Contract
To be Approved	Transitional Status	For Signature: To be Approved → To Be Signed Cancelled: To be Approved → Cancel Contract
To Be Signed	Transitional Status	Signed: To Be Signed → 1-Executed Cancelled: To Be Signed → Cancel Contract
Under Review 1	Transitional Status	For Approval: Under Review 1 → To Be Approved Cancelled: Under Review 1 → Cancel Contract



Learn how to add and manage contra workflows [here](#).

To initiate various approval and signature center processes, it is necessary to fill out the related workflow statuses

Link Statuses

Now you can link Workflow Statuses to Approval and Signature Center Statuses.

Approval Center ☒

Signature Center ☒

Approval Center (Awaiting Approval) 	Workflow Status To be Approved	Choose the Workflow Status that will set the Contract/Document as Awaiting Approval in the Approval Center. For example, when your Workflow Status is set to Under Approval , then the Contract/Document will automatically be set to Awaiting Approval in the Approval Center.
Approval Center (Approved) 	Workflow Status To Be Signed	Choose the Workflow Status that will be set automatically once a Contract/Document is Approved in the Approval Center. For example, if you have 2 approvers, once they have both approved, the Approval Center status is Approved , and this will trigger Workflow Status to be changed automatically.
Approval Center (Awaiting Revision) 	Workflow Status Under Review 1	Choose the Workflow Status that will be set automatically once a Contract/Document is Awaiting Revision in the Approval Center. For example, if the approver rejects the Contract/Document or asks for adjustments, The Approval Center status is set to Awaiting Revision . This will trigger the Workflow Status to be changed automatically.
Signature Center (Awaiting Signature) 	Workflow Status To Be Signed	Choose the Workflow Status that will set the Contract/Document as Awaiting Signature in the Signature Center. Option: Choose the Workflow Status that will be set automatically when a Contract/Document is routed to the Signature Center.
Signature Center (Signed) 	Workflow Status Under Review 1	Choose the Workflow Status that will be set automatically once a Contract/Document is Signed in the Signature Center. For example, if you have 2 signers, once they have both signed, the Signature Center status is Signed , and this will trigger Workflow Status to be changed automatically.
Approval Or Signature Center (Canceled) 	Workflow Status Cancel Contract	Choose the Workflow Status that will set the Contract/Document as Canceled in the Approval or Signature Center.

Save Cancel

Moreover, you can choose to activate either the approval center or the signature center individually.

Link Statuses

Approval Center

Signature Center

Approval Center (Awaiting Approval)

Workflow Status

Awaiting Approval

To be Approved

Choose the Workflow Status that will set the Contract/Document as **Awaiting Approval** in the Approval Center.

For example, when your Workflow Status is set to **Under Approval**, then the Contract/Document will automatically be set to **Awaiting Approval** in the Approval Center.

Approval Center (Approved)

Workflow Status

Approved

To Be Signed

Choose the Workflow Status that will be set automatically once a Contract/Document is **Approved** in the Approval Center.

For example, If you have 2 approvers, once they have both approved, the Approval Center status is **Approved**, and this will trigger Workflow Status to be changed automatically.

Approval Center (Awaiting Revision)

Workflow Status

Awaiting Revision

Under Review 1

Choose the Workflow Status that will be set automatically once a Contract/Document is **Awaiting Revision** in the Approval Center.

For example, If the approver rejects the Contract/Document or asks for adjustments, The Approval Center status is set to **Awaiting Revision**. This will trigger the Workflow Status to be changed automatically.

Approval Or Signature Center (Canceled)

Workflow Status

Canceled

Cancel Contract

Choose the Workflow Status that will set the Contract/Document as **Canceled** in the Approval or Signature Center.

Save

Cancel

Once the linked statuses are configured, they will be automatically applied to all new contracts created under the selected workflow.

CT299 - Back Boss Agreements

Executed

Final Review

Negotiation Step

More

Active

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses

Emails

Reminders

Approval Criteria:

Approval Status: Not Started

Edit Approvers

1

Carolina Robinson

Show Summary

Open Contract/Document

Send Email

Resend Approval Email

1

Julia Marven

Show Summary

Open Contract/Document

Send Email

Resend Approval Email

Approval history

You will notice that the approval and signature center for these contracts will have a status of "Not Started" initially. As the contract progresses through the defined workflow statuses, the corresponding statuses in the approval and signature center will be updated accordingly, ensuring that the process starts at the appropriate stage.

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

Thank you!