How to Manage Company Reminders

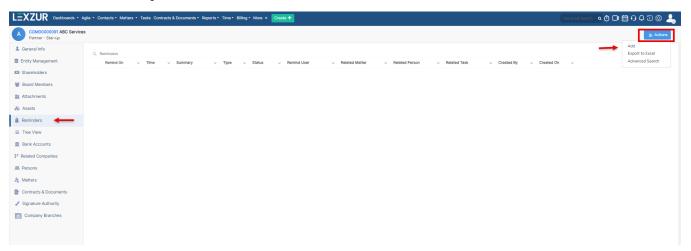
Objectives

• Set Company Related Reminders

Steps

The Reminders tab consolidates all reminders associated with the company.

Reminders can be inserted using the Create button in the main menu or the Action button.



You must fill out 5 mandatory fields:

- Reminder type: Choose from a customizable list of values.
- Remind on date and time.
- Notify before: Specify the number of days/weeks/months in advance for notification, with options for a reminder popup or both a reminder popup and email.
- User to Remind: Select the user for the reminder, and you can include yourself by clicking the "Add me" hyperlink.
- Summary: Provide a summary for the reminder.

New Reminder

Reminder Type*	Hearing - +
Remind On*	2022-05-23
Repeat	Never -
Notify before*	5 day(s) - by Reminder Popup -
User to Remind*	
Summary*	Add me

Additionally, you have the option to duplicate (clone) the reminder for other users and associate it with a matter, company, person, or task. For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!

Save

Cancel