

How to Renew a Contract

Objectives

- Renew a contract

Steps

Upon the contract expiration, open the contract page by clicking on its name or ID from the grid.

Navigate to the top right of the page, and click on the **three dots** **Renew**.

The screenshot displays the LEXZUR contract management interface. The top navigation bar includes tabs for Dashboards, Agile, Contacts, Matters, Tasks, Contracts & Documents, Reports, Time, Billing, and More, along with a 'Create +' button. The main content area is divided into sections: Details, Attachments, Approval Center, Signature Center, Milestones, Tasks, Emails, Time Entries, Expenses, Reminders, Matters, and Related Contracts/Documents. The 'Details' section shows fields for Type (Service Agreement), Sub type (None), Value (None), Country (None), Applicable Law (None), Termination Clause (None), Priority (Medium), Currency (AED), Reference# (None), Client (None), and Add a link (None). The 'Parties' section shows Party (None) and Category (None). The 'Description' section is empty. On the right side, there are sections for 'People' (Requester: Julia Marven, Assigned Team: Contract Team, Assignee: None, Created By: Julia Marven (Portal User), Modified By: Carol Mourawed (Portal User), Authorized Signatory, Contributors: None, Watchers: Alice Jones, Collaborators: None) and 'Dates' (Date: 2023-01-05, Renewal, Start Date: None, End Date: None). A red box highlights the 'three dots' menu icon in the top right corner, and a red arrow points to the 'Renew' option in the dropdown menu.

There are some fields to be filled out:

- **Contract Date:** Choose the date for contract renewal.
- **Renewal:** Utilize a predefined list, manageable in the Settings, containing renewal type.
- **Notify Users:** Select specific users who will receive notifications regarding this contract.
- **Notify Teams:** Choose the team that should be notified about this contract.

Renew Contract/Document



- Do you want to deactivate the previous contract/document? ☒
- Do you want to archive the previous contract/document? ☒
- Do you want to inherit the Approval Center of the previous contract/document? ☒
- Do you want to inherit the Signature Center of the previous contract/document? ☒

Date*

2023-06-01

Renewal

One time contract

▼

Start Date

2023-06-01

End Date

YYYY-MM-DD

Notify me before

90

day(s)

▼

Notify Users

JonesAAlice21@gmail.com x

Notify Teams

Select Assigned Teams

Save

Cancel

You have also the option to decide if you want to deactivate or archive the previous contract and inherit the approval and signature center from the previous one as well.

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

Thank you!