

How to Manage Contract Reminders

Objectives

- Add and track contract reminders (Renewals, deliverables...)

Steps

The **"Reminders"** tab encompasses all reminders linked to the contract, covering various aspects such as contract renewals, due dates, tasks, milestones, and more. With Reminders the system will alert relevant stakeholders about crucial events and tasks, ensuring that nothing goes overlooked.

Within this tab, you can access specific reminder information, including the reminder date, time, reminder type, summary, and the designated user for notification.

To add new reminders, use the **"Actions"** button and select **"Add New Reminder."**

CT362 - Purchase agreement for Technical Products

Filing & DraftingUnder ApprovalUnder NegotiationMoreActive

DetailsAttachmentsApproval CenterSignature CenterMilestonesTasksTime EntriesExpensesEmailsRemindersMattersRelated Contracts/DocumentsSettings

Search Reminder

Actions

Add New Reminder

| Actions | Remind On | Time | Summary | Type | Status | Created By | Remind User | Created On | Related Matter | Relate |
|---------|------------|-------|--|-----------------|--------|-------------------|-------------------|------------|----------------|--------|
| | 2023-09-20 | 08:00 | Exchange notes related to the agreement | Exchange note | Open | Carolina Robinson | Carolina Robinson | 2023-09-20 | | |
| | 2023-09-20 | 08:00 | Exchange notes related to the agreement | Exchange note | Open | Carolina Robinson | Alice Jones | 2023-09-20 | | |
| | 2024-08-31 | 08:00 | The Contract/Document CT362 will expire on 2024-08-31 for your information and potential action. | system-reminder | Open | Carolina Robinson | Carolina Robinson | 2023-08-24 | | |

Page 1 of 1101 - 3 of 3 items

There are 5 mandatory fields: **Reminder type, remind on date and time, notify before, the user to remind, and a summary.**

- Reminder type: A list that can be customized on the fly.
- Remind on: the date and time of the reminder
- Notify before: choose if day, week, or month, and then choose if you want to be notified by "reminder popup" or "reminder popup and email".
- User to remind: Specify the user to remind
- Summary: Add a summary
- Clone: the option to clone the same reminder for other users.

New Reminder



Reminder Type*

system-reminder

+

Remind On*

2022-10-13

08:00

Repeat

Never

Notify before*

5

day(s)

by

Reminder Popup

User to Remind*

Add me

Summary*

Save

Cancel

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

Thank you!