

How to Manage Matter Reminders

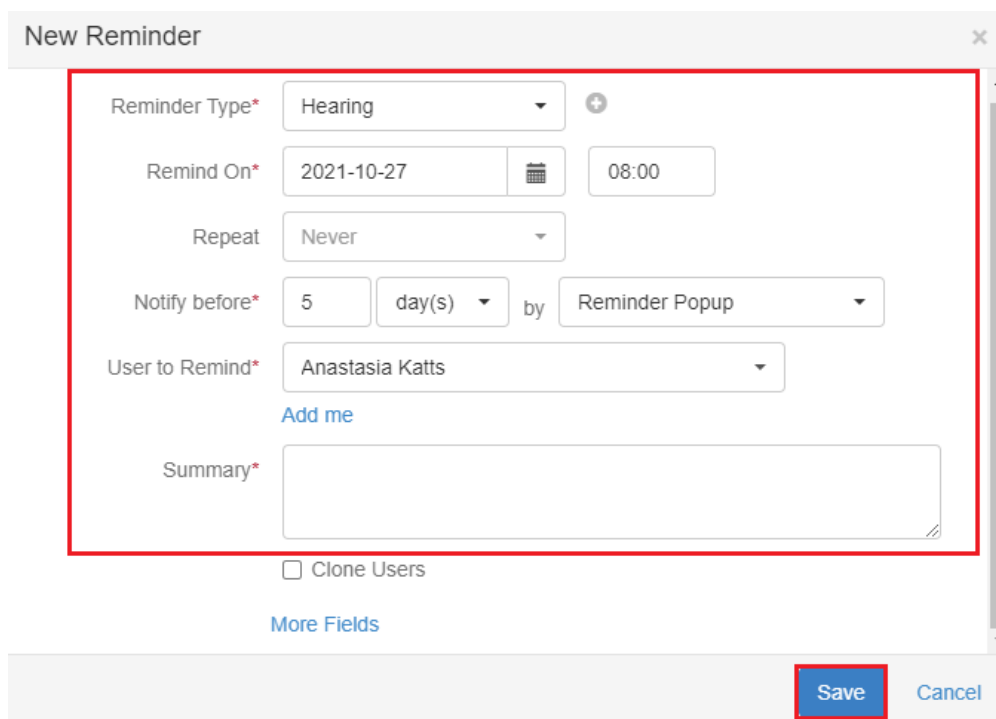
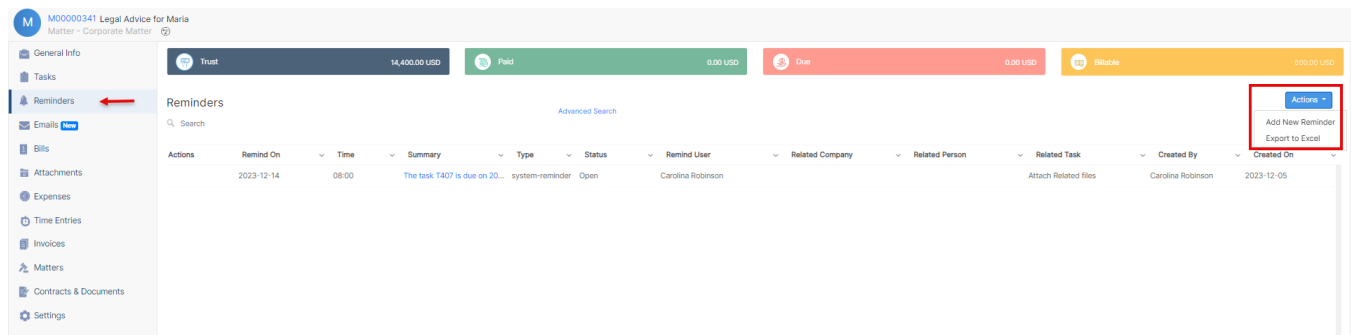
Objective

- Add Reminders Related to a matter

Steps

The reminders tab includes all the reminders associated with the matter. This tab includes reminder details such as reminder date, time, user to remind, and so on.

Reminders can be added through the **Actions** button -> **Add New Reminder**



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:** Set the specific date and time for the reminder.
- **Notify before:** Choose the timeframe (day, week, or month) and select notification preferences (reminder popup, email, or both).
- **User to remind:** Specify the user for the reminder.
- **Summary:** Provide a summary
- Then **save**.

You can also Export the list of Reminders by clicking on **Actions Export to Excel**

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

Thank you!