

How to Manage Company Reminders

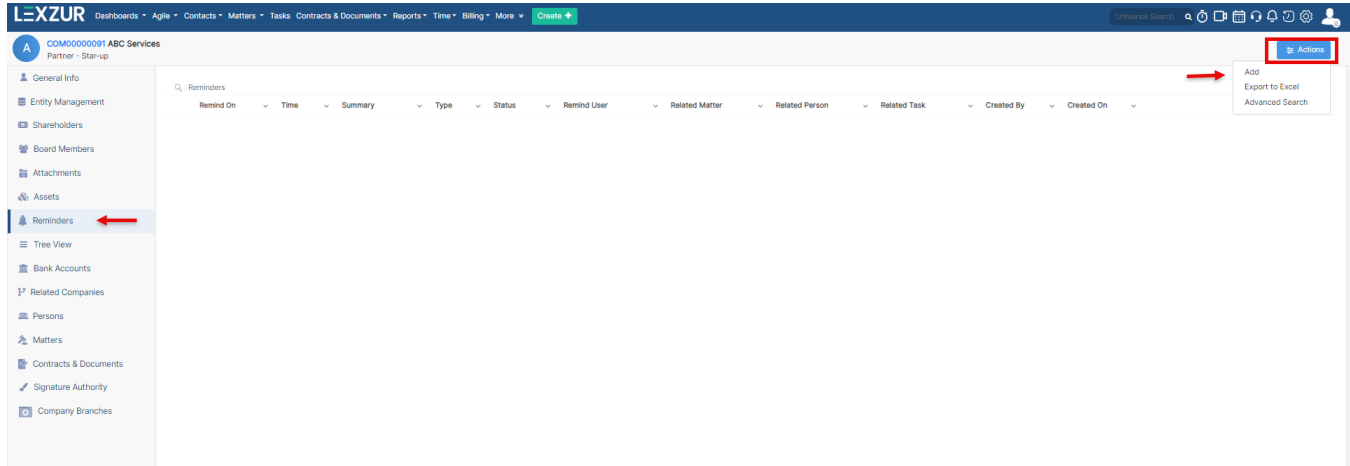
Objectives

- 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

08:00

Repeat Never

Notify before*

5

day(s)

by

Reminder Popup

User to Remind*

[Add me](#)

Summary*

Save

Cancel

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!