

How to Automate Tasks and Reminders When Creating Contracts

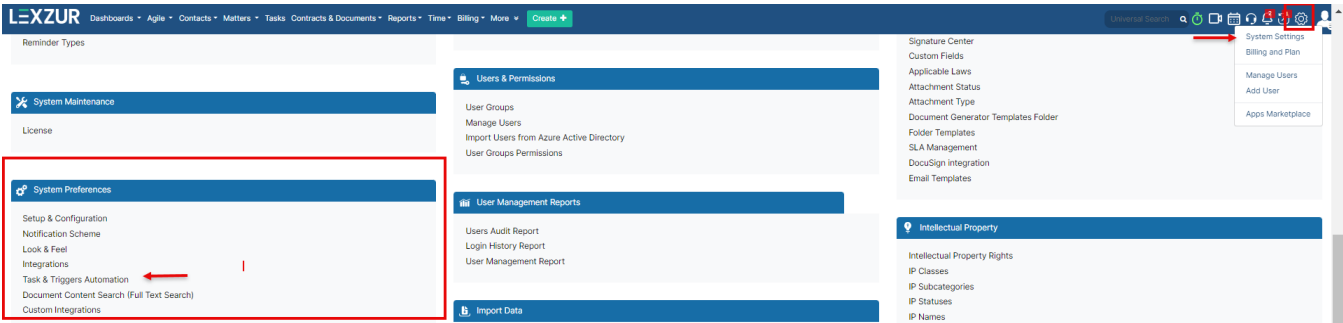
Objectives

- Automatically assign Tasks or Reminders when a new contract is created

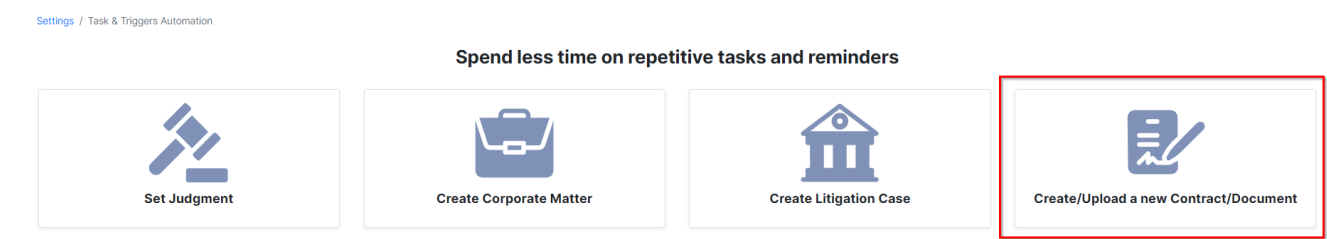
Steps

When creating a new contract, you can automatically trigger tasks and reminders to ensure timely and efficient management of the contract.

To set up automatic task and reminder triggers, navigate to the **System Settings System Preferences Tasks & Triggers Automation**



Within the Tasks and Triggers Automation, you will find the option to create Contracts Triggers. Simply click on **Create/Upload a new Contract /Document**.



Matter Triggers (23)

Trigger Type	Practice Area	From	To	Trigger	Actions
Set Judgment	Commercial	Appeal Court	Cassation/High Court	Add Task (To-Do)	
Set Judgment	Criminal	Appeal Court	Cassation/High Court	Add Task (To-Do)	
Set Judgment	Administrative	Appeal Court	Cassation/High Court	Add Task (To-Do)	
Create Corporate Matter	Acquisition			Add Task (calling clients) / Add Task (Attach Docs on App4legal)	
Create Corporate Matter	Commercial			Add Task (Attach Docs on App4legal) / Add Reminder (Reminder)	
Set Judgment	Arbitration	Appeal Court	Execution	Add Task (Attach Docs on App4legal)	
Create Corporate Matter	Commercial			Add Task (Attach Docs on App4legal) / Add Reminder (License)	
Set Judgment	Civil	First Instance Court	Appeal Court	Add Reminder (Appeal) / Add Task (Attach Docs on App4legal)	
Create Corporate Matter	Legal opinion			Add Task (Attach Docs on App4legal) / Add Reminder (License)	

Here, you can specify the tasks that need to be assigned and completed, as well as the reminders that should be sent out to relevant parties.

Specify contract type-based conditions and click **"Add Action"** to include tasks or reminders.

Create a Trigger Type

Trigger Type*

Create/Upload a new Contract/Document

Conditions

Types*

Consultancy Agreement

+ Add Action

Add Task

Add Reminder

Cancel



For each task, you can define the task type, assignees, due dates, title, and any additional details or instructions. These tasks will be automatically created and assigned when a new contract is added to the system, ensuring that all necessary actions are taken within the designated timeframes.

You can add as many tasks as needed, or add Reminders in the same trigger using the **"Add More Action"**

Add Task

Actions

Due in (days)*

10

Task Type*

Contract Revision

Assigned to*

☐ Assignee
 ☐ Contract/Document Creator
 ☐ Other

Title*

Review Agreement and Set Requirements

Description

Description

+ Add More Action

Finish



Similarly, you can configure reminders to be sent to specific individuals. You must define the reminder type, due in period, summary, and the user to remind.

These reminders serve as notifications to keep everyone involved in the contract informed and on track with their responsibilities.

Add Reminder

Due in (days)*

15

Reminder Type*

Reminder

User to Remind*

☒ Assignee
☐ Contract/Document Creator
☐ Other

Summary*

Drafting and Reviewing





+ Add More Action

Finish

Cancel

The list of Contracts Triggers will be then tracked under the Tasks and Triggers Automation page, where you can do further actions such as editing or deleting.

Contracts and Documents Triggers (2)

Trigger Type	Type	From	To	Trigger	Actions
Contract/Document Status Transition	Non-disclosure Agreement	To be Approved	To Be Signed	Add Task (Meeting with Client)	 
Create/Upload a new Contract/Document	Consultancy Agreement			Add Task (Contract Revision) / Add Reminder (Reminder)	 

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

Thank you!