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

LEXZUR Dashboards - Agile - Contacts - Matters - Tasks Contracts & Documents - Reports	- Time - Billing - More + Create +	Universal So	🚥 () () 🖬 () 🛱 🐉 🔕 🦉
Reminder Types		Signature Center Custom Fields	System Settings Billing and Plan
	🚊 Users & Permissions	Applicable Laws Attachment Status	Manage Users Add User
X System Maintenance License	User Groups Manage Users Import Users from Azure Active Directory User Groups Permissions	Attachment Type Documert Generator Templates Földer Földer Templates SLA Management DocuSign Integration	Apps Marketplace
g [₽] System Preferences	前 User Management Reports	Email Templates	
Setup & Configuration Notification Scheme Look & Feel	Users Audit Report Login History Report Liser Mananement Report	Intellectual Property Intellectual Property Rights	
Integratoria Task & Tigggers Automation Document (Content Search (Full Text Search) Custom Integrations	(b) Import Data	IP Classes IP Subcategories IP Statuses IP Names	

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



Spend less time on repetitive tasks and reminders



Matter Triggers (23)

Trigger Type	Practice Area	From	То	Trigger	Act	Actions	
Set Judgment	Commercial	Appeal Court	Cassation/High Court	Add Task (To-Do)	đ	Û	
Set Judgment	Criminal	Appeal Court	Cassation/High Court	Add Task (To-Do)	C	Û	
Set Judgment	Administrative	Appeal Court	Cassation/High Court	Add Task (To-Do)	C	Û	
Create Corporate Matter	Acquisition			Add Task (calling clients) / Add Task (Attach Docs on App4legal)	C	Û	
Create Corporate Matter	Commercial			Add Task (Attach Docs on App4legal) / Add Reminder (Reminder)	đ	Û	
Set Judgment	Arbitration	Appeal Court	Execution	Add Task (Attach Docs on App4legal)	C	Û	
Create Corporate Matter	Commercial			Add Task (Attach Docs on App4legal) / Add Reminder (License)	Ø	Û	
Set Judgment	Civil	First Instance Court	Appeal Court	Add Reminder (Appeal) / Add Task (Attach Docs on App4legal)	C	Û	(
Create Corporate Matter	Legal opinion			Add Task (Attach Docs on App4legal) / Add Reminder (License)	0	Û	

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.

Settings / Task & Triggers Automation / Add Trigger

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Create/Upload a new Contrac	t/Document	~	•		
Conditions					
Types*					
Consultancy Agreement		\sim	-	_	
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, , greenerk		+ Adc	Action		
	Add Task	+ Adc	l Action		

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"

Actions		۵	
Due in (days)*	Task Type* 🛛 🛶 🛶		
10	Contract Revision	~	
Assigned to*	Title*		
OAssignee Contract/Document Other	Review Agreement and Set Requirements		
Description			
Description			
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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.

Actions		6
Due in (days)*		Reminder Type*
15		Reminder V
User to Remind*		Summary*
Assignee Contract/Document Creator	Other	Drafting and Reviewing
	+ Add Mor	e Action

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	Туре	From	То	Trigger	Action	ns
Contract/Document Status Transition	Non-disclosure Agreement	To be Approved	To Be Signed	Add Task (Meeting with Client)	Ø	Û
Create/Upload a new Contract/Document	Consultancy Agreement			Add Task (Contract Revision) / Add Reminder (Reminder)	6	Û

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

Thank you!