

How to Manage Reminders

Objective

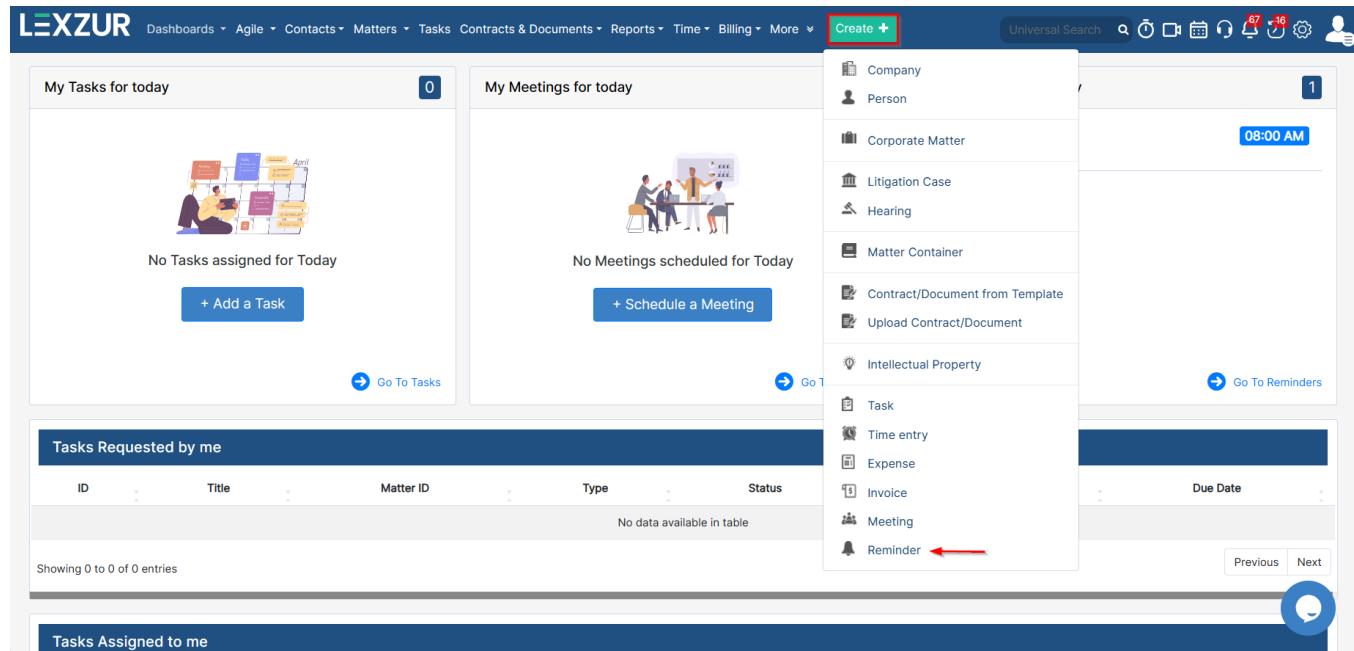
- Add and manage reminders

Steps

In LEXZUR, adding reminders is a straightforward process that helps you stay organized and never miss an important task or deadline.

To add reminders, you can do so effortlessly either from the "Create" button or directly from the respective module's page. This ensures that you can quickly create reminders without navigating through multiple pages.

Click on the **Create** button **Reminder**.



On the new reminders page, fill out the mandatory fields:

- **Reminder Type:** Choose the appropriate reminder type from the drop-down menu. You can easily add new types by clicking on the "+" button located next to the selection.
- **Remind on:** Select the specific date and time when you wish to receive the reminder.
- **Notify before:** To receive a notification before the specified date. Additionally, you can decide whether you prefer a pop-up reminder or an email reminder accompanied by a pop-up.
- **User to Remind:** Choose the relevant user who should receive the reminder notification.
- **Summary:** Provide a summary or description of the reminder to ensure clarity and easy identification of its purpose.

You can repeat this reminder daily, weekly, monthly, yearly, every 2 weeks, 3 months, and so on.

New Reminder



Reminder Type*

Reminder

+

Remind On*

2023-07-12

08:00

Repeat

Never

Notify before*

5

day(s)

by

Reminder Popup

User to Remind*

Add me

Summary*

Save

Cancel

You can also Clone this reminder for multiple users.

You have the ability to relate reminders to various elements such as matters, contracts, tasks, persons, or companies under more fields.

Reminders can also be created separately, allowing you to set personalized notifications for specific events or deadlines.

New Reminder



Related Matter

M20, Matter Name or Client Name

Start typing to select from possible matches of matter, client or use the Matter ID ex. M10

Related Contract/Document

Start typing to select from possible matches.

Related Company

Start typing to select from possible matches.

Related Person

Start typing to select from possible matches.

Related Task

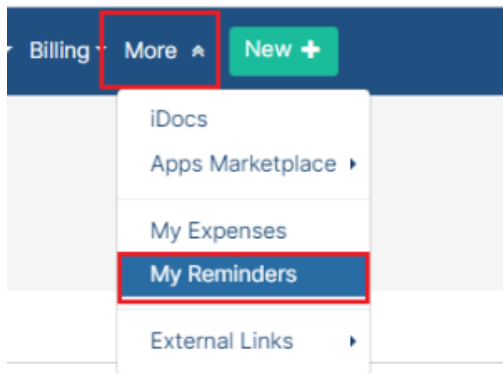
Start typing to select from possible matches.

Less Fields

Save

Cancel

Once created reminders will be tracked under a separate page. Navigate to **MoreMy Reminders**.



From this page, you can track and manage your reminders, edit, dismiss, postpone, and so on.

My Reminders All Reminders Export									
1 - 20 of 119 items Search Advanced Columns									
Actions	Remind On	Time	Summary	Type	Status	Remind User	Related Matter	Related Contract/Document	Related Company
<div><div>2024</div><div><div></div><div>View / Edit</div><div>Dismiss</div><div>Postpone</div><div>Delete</div></div></div>	06-22	08:00	The Contract/Document PAA-CT-20230524-27...	system-reminder	Open	Alice Jones		Partnership agreement-Agency Grid	
	02-01	00:00	Renewal of the IP Software for HR Depart...	ip-renewal	Open	Alice Jones			
	01-04	08:00	GMC License renew...	License	Open	Alice Jones			GMC Industries
	01-02	08:00	Contract Renewal...	Renew Contract	Open	Alice Jones		Cost-reimbursable Advanced Solutions	
	2023-09-27	08:00	Renew Contract PA for Agency Grid...	Renew Contract	Open	Alice Jones		Partnership agreement-Agency Grid	
	2023-07-22	08:00	Reminder...	Reminder	Open	Alice Jones			
	2023-07-18	11:00	Hearing H178 - M254 BLP Industry x ABC S...	Hearing	Open	Alice Jones	BLP Industry x ABC Services LLP		
	2023-07-12	08:29	Send the hearing report to the client...	Hearing	Open	Alice Jones			
	2023-07-07	08:00	contract renewal...	Renew Contract	Open	Alice Jones		Purchase agreement for Global Tech	
	2023-06-21	10:30	Hearing H168 - M230 Agency Grid X ABC Co...	Hearing	Open	Alice Jones	Agency Grid X ABC Company		

Moreover, each module features a dedicated "Reminder" page. This means that you can conveniently access all related reminders for a particular matter, contract, or task from one central location. This streamlines your workflow and helps you stay on top of important dates and commitments.

M

M00000341 Legal Advice for Maria

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails Now

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Trust 14,400.00 USD

Paid 0.00 USD

Due 0.00 USD

Billable 2,500.00 USD

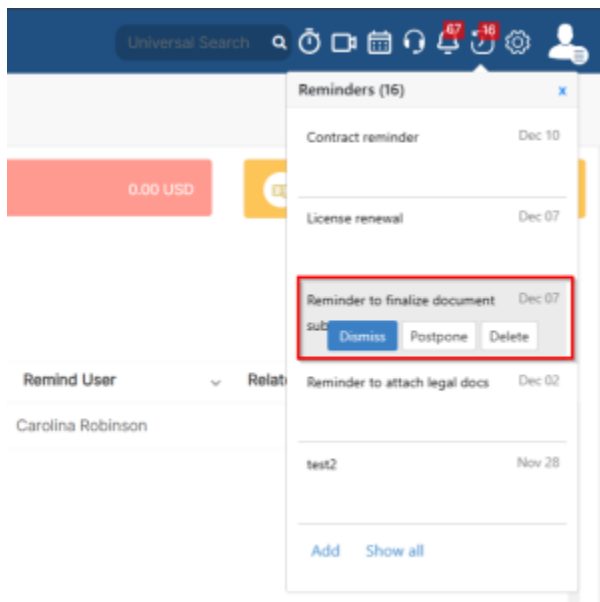
Reminders

Advanced Search

Search

Actions	Remind On	Time	Summary	Type	Status	Remind User	Related Company	Related Person
	2023-12-14	08:00	The task T407 is due o...	system-remi...	Open	Carolina Robinson		

You will receive an in-app notification with the reminder, accessible through the reminder icon located on the right side of the navigation menu.



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

Thank you!