

CONTRACT EXPRESS

How to Set up email alerts for contract renewals

Overview

Administrators have the ability to set up email alerts to notify the creator of the contract that it is due for renewal. This ensures that the correct person is instructed to take action when necessary.

For example, administrators may wish to arrange for an alert to be sent to the relevant colleagues 30 days prior to the renewal date.

Before you start

Before an alert can be set up, the following need to be in place:

- You need to be an administrator in Contract Express.
- The template for the contract in question needs to have the variable "AgreementDate" and contain the signing date.
- The template should be set as "live".

How to set up an alert

Set up the general parameters

1. Select the settings cog and select Admin Settings.
2. Navigate to the "Alerts" tab and select "New Alert".
3. Set the title and description for the alert, as outlined below.

Add Alert

Title

Renewal Alert

Description

An alert for the renewal of a contract due in one year. The alert will be sent 30 days before the renewal date.

Set up the trigger conditions

The **trigger** determines when an email should be sent to the relevant users. In this case, an email alert should be sent upon the contract's execution (i.e. when the contract's status changes to "Executed").

To configure the trigger:

4. Select the  button in the Trigger section. This will open a pop-up window within Contract Express.
5. Select "Metadata" in the templates drop-down menu.
6. Select "Status (String)" from the variable list and click the "Select" button.

Add Variable

Selecting a template will populate its variables into the list below.

Templates

Metadata

Variables

- Doc Id (Integer)
- Last Modified (Date)
- Matter Number (Integer)
- Modified By (String)
- Name (String)
- Previous Status (String)
- Sharing (String)
- Status (String)**
- Template (String)

Select

Cancel

7. Select "=" operator for the condition in the second drop-down.
8. Select "Executed" status in the third drop-down.

Your trigger condition should appear as below:

Trigger

{}

+ x  =

Send alert every time it meets the criteria above

NOTE. Contract Express generates an email alert when the trigger condition is met, but the delivery date for the email must be configured separately using the send-out rule.

Set up the send-out rule

To receive the email alert 30 days prior to the renewal date, the administrator must add one year to the contract signing date in the "AgreementDate" variable. To do this:

9. Select the "Send with delay" button. This ensures that the email sends at the specified time in the future and not when the alert is set up.
10. Set the rule of "30 days before" using the drop down menus in the send-out rule section, as outlined below..

Number	Units	Before/After
30	Days	Before

You must then define how the renewal date should be calculated. To do this:

11. Select the pencil icon to open the CEML Expression Builder.

NOTE. CEML (Contract Express Markup Language) is a set of functions which help to calculate the time of the email delivery.

12. Select "Insert Function" and the "YearsAfter" option from the drop down menu. This function should be used in this case as the contract is due for renewal one year after its execution.
13. Set up arguments for the selected function.

"YearsAfter" function has two arguments – the source date and the number of years. In this case, the source date is the contract's signing date from the *AgreementDate* variable.

- a. Select "Insert Function" and select the template and variable to add in the expression.
- b. Add "1" to indicate the number of years from the source date.

The expression should appear as:
YearsAfter(AgreementDate, 1)

14. Save the CEML Expression.

As a result, your send-out rule should appear as below:

Number	Units	Before/After	Date Variable
30	Days	Before	YearsAfter(AgreementDate, 1)

NOTE. If your template already has a variable that contains the expiration date, you can use this variable in the send-out rule without creating a CEML expression. Alternatively, you can use the date when the alert is being triggered (TriggerDate) and set up the email alert to be sent <N> days or months after it.

Apply email alert to the template

1. Visit the template details page.
2. Navigate to the "Alerts" tab..
3. Select "Enable alerts" followed by "Renewal alert".

NOTE. The selected alert will be automatically enabled for new documents created from this template. To activate the alert for existing documents, visit the document details page of the relevant document and subscribe to the alert. You can also use the same alert for multiple templates in Contract Express.

Subscribe to the email alert

In order to subscribe, visit the document page and:

1. Visit the document page and select the relevant document.
2. Scroll down to the alerts section.
3. Select the required alert(s) and click "Subscribe".

Alternatively, you can subscribe through the My Account page in Contract Express.

1. Click your username at the top of the page.
2. Select "My Account" option.
3. Select "My Alerts"
4. Search for the required document or alert.
5. Select the alert(s) followed by "Subscribe".

NOTE. The document creator is, by default, subscribed to all alerts related to a particular document. To ensure that a nominated user or groups of users also receive the email alerts, they must be set up as recipients in the alert settings.

Contact us

If you have any questions, please contact our customer support team.

E: contractexpress-support@tr.com

T: +44 (0) 345 600 9355