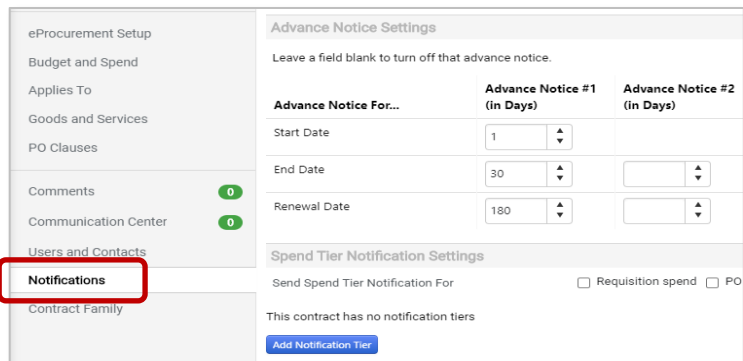


Contract Notifications

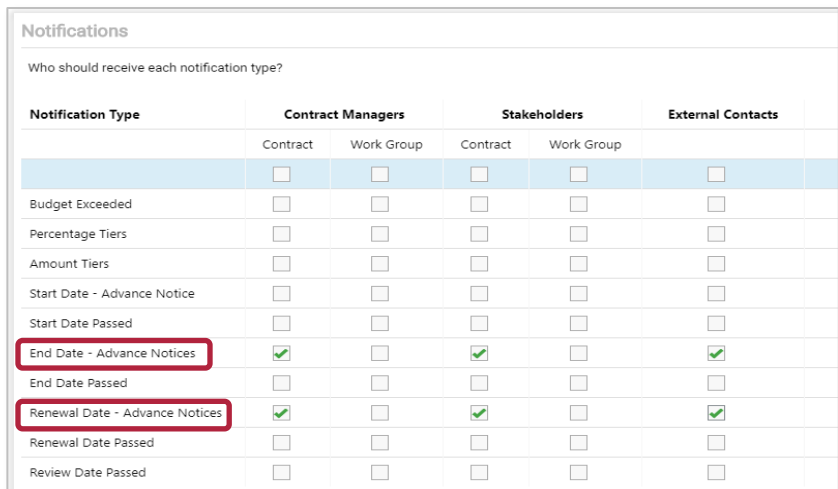
Contract Advance Notice Notifications

Summary: This document outlines the process to send out advance notice email notifications for a contract's **End Date** and/or **Renewal Date**.

1. Open the contract you want to set a notification for. You can access the notification options for your contract by navigating to the **Notifications** tab on the contract's profile.

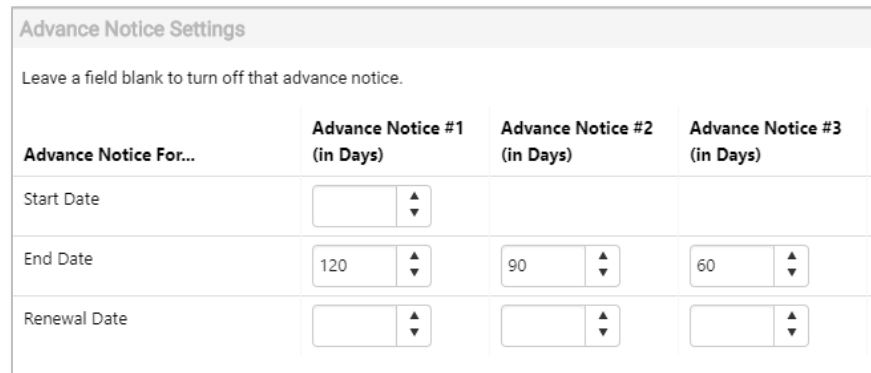


2. Next, decide who should receive **End Date – Advance Notices*** and **Renewal Date – Advance Notices**** notifications on this contract. You can select **Contract Managers or Stakeholders**; **External Contacts are not used**. Be sure to only select boxes in the **Contract** column. Do not select any boxes under the **Work Group** column.



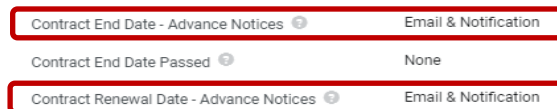
Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Work Group	Contract	Work Group	
Budget Exceeded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date - Advance Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
End Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Renewal Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. After selecting who should receive the advance notices, determine how many calendar days in advance of the **End Date** or **Renewal Date** the notice should be sent out. You may set up to three advance notices.



Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
End Date	120	90	60
Renewal Date	<input type="text"/>	<input type="text"/>	<input type="text"/>

IMPORTANT! You need to check that emails are enabled in your B2P profile in order to receive these advance notifications. Go to the **User Icon** → **View My Profile** → **Notification Preferences** → **Contracts**, where you can set up your notification preferences (refer to this [guide](#) for further details).



Contract End Date - Advance Notices	Email & Notification
Contract End Date Passed	None
Contract Renewal Date - Advance Notices	Email & Notification

***End Date – Advance Notices** are used when you want a notification sent out prior to the contract's expiration date. This provides the opportunity to review a contract and determine whether to extend the agreement or allow it to expire.

****Renewal Date – Advance Notices** are used when you want a notification sent out prior to the automatic renewal of the contract. This allows for enough time to review the contract and determine whether to allow the agreement to renew or send notice of termination.

NOTE – If you want to generate notifications and assign specific tasks to individuals (e.g. request new insurance certificate), please utilize the **Obligations** feature. Learn more about **Obligations** [here](#)

Contract Notifications

Example – Automatic Renewals

In the Term section, your contract states, “This Agreement will automatically renew for an additional year unless either party gives written notice to the other at least sixty (60) days prior to the end of the term that the Agreement is to terminate.”

1. First, be sure to have the correct information in the **Header** of your contract. **Renewals Remaining** should be set to 1, the **Renewal Term** should be set to 12 Months, **Auto-Renew** should be set to Yes, and **Auto Renew Creation** should be set to 60 days ahead of the **End Date**.

Dates and Renewal

Time Zone * EDT/EST - Eastern Standard Time (US/Easte

Start Date * 09/26/2020 12:00 AM

End Date * Expires On 09/25/2021 11:59 PM

Review Date

Review Term

Reviews Remaining

Renewals Remaining 1

Automatically Apply Price File with Renewal

Renewal Term 12 Months

Auto-Renew Yes

Auto Renew Creation 60 Days before contract end date

2. Next, on the **Notifications** tab, set who should receive advance notice notifications, then set at least one **Advance Notice** for the **Advance Notice For Renewal Date**. In the depiction below, advance notices will be sent out 90, 60, and 30 days prior to the **Auto Renew Creation** date.

Advance Notice Settings

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date			
End Date			
Renewal Date	90	60	30

Example – End Date

In the Term section, your contract states, “The term of this Agreement shall begin as of the Effective Date and shall continue until September 25, 2021, unless sooner terminated under this Term and Termination Section or extended by written agreement of the parties.”

1. You want to make sure your team has ample time to review the contract and determine whether they want to extend the agreement for another year. You should not fill in any of the **Renewal** fields in the header, only the **End Date**.

Dates and Renewal

Time Zone * EDT/EST - Eastern Standard Time (US/Easte

Start Date * 09/26/2020 12:00 AM

End Date * Expires On 09/25/2021 11:59 PM

Review Date

Review Term

Reviews Remaining

Renewals Remaining

Automatically Apply Price File with Renewal

Renewal Term

Auto-Renew No

2. Next, on the **Notifications** tab, set who should receive advance notice notifications, then set at least one **Advance Notice** for the **Advance Notice For End Date**. In the depiction below, advance notices will be sent out 90, 60, and 30 days prior to the **End Date**.

Advance Notice Settings

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date			
End Date	90	60	30
Renewal Date			