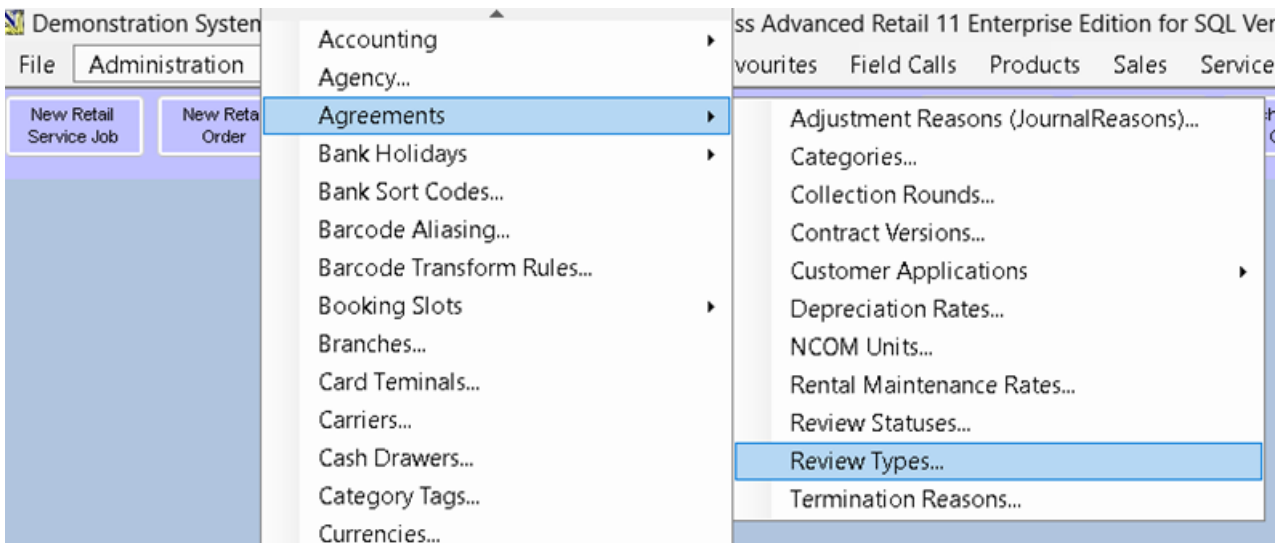


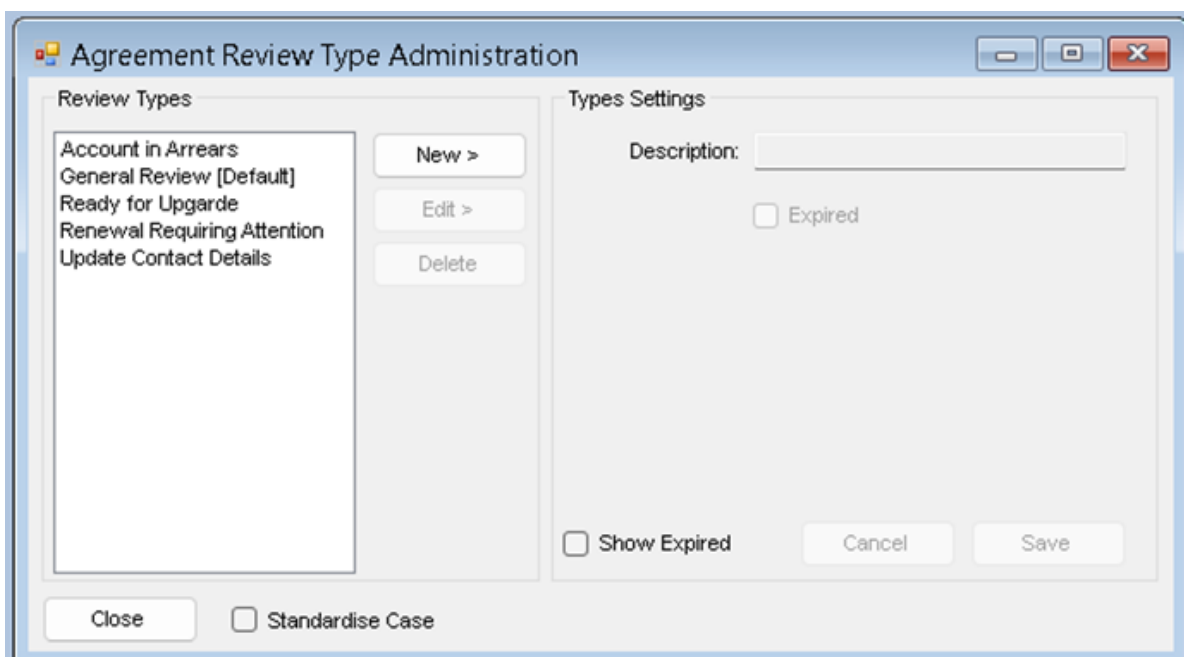
Configuration

Setting up Agreement Review Types

To set up agreement review types, navigate to the administration menu: Administration > Agreements > Review Types

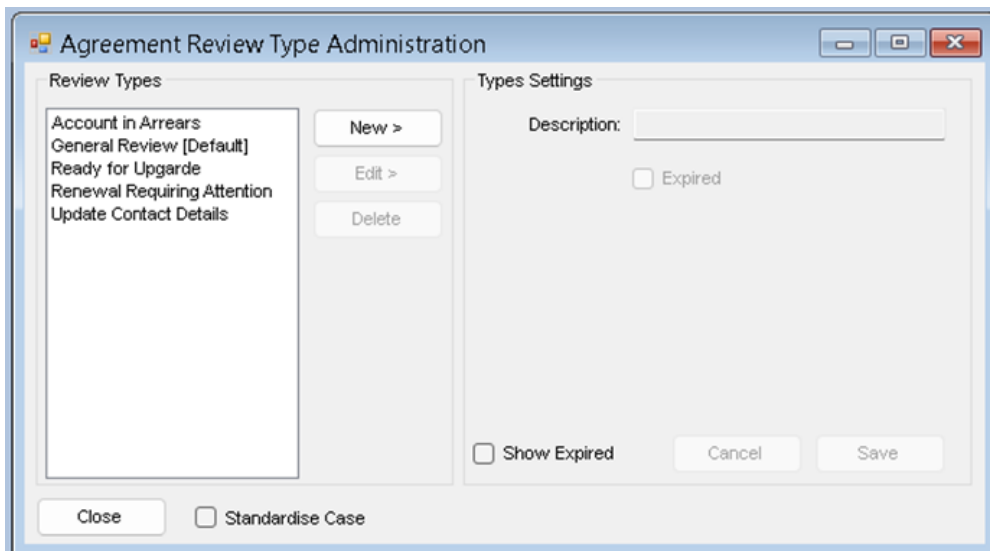


Each review type serves as a descriptive tag for the review. You can create as many review types as needed. Review types can only be deleted if they have not been used. If a review type is no longer needed, mark it as expired.



Deleting a Review Type

1. Highlight the entry and click **'Delete'** (only available if the review type has not been used).

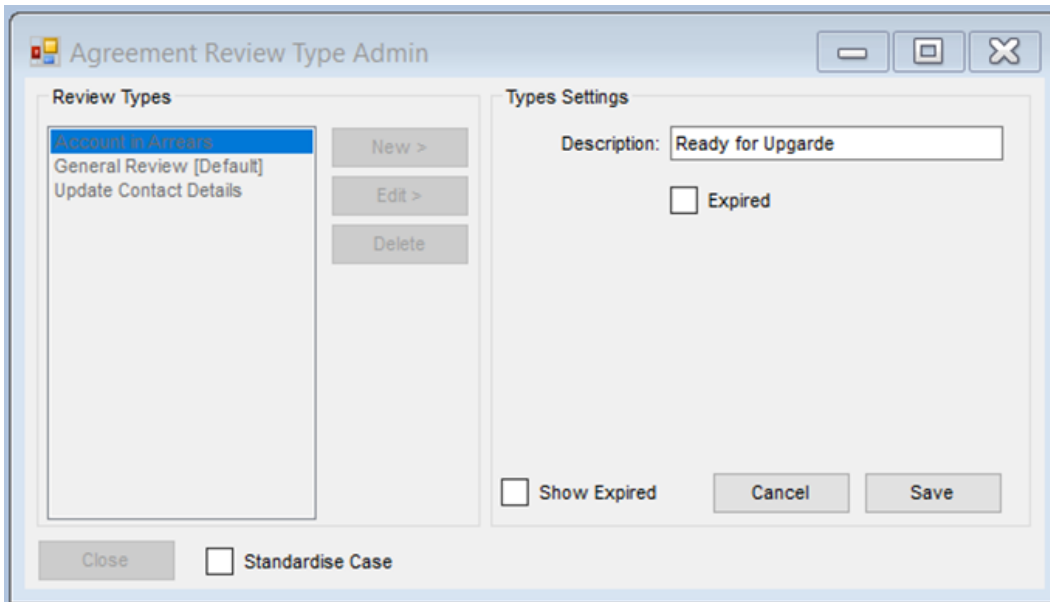


Editing a Review Type

1. Highlight your entry and click **'Edit'**.
2. You can update the description or mark it as expired.
3. Click **'Save'**.

Adding a New Review Type

1. Click **'New'**.
2. Enter the description of the review type.
3. Click **'Save'**.

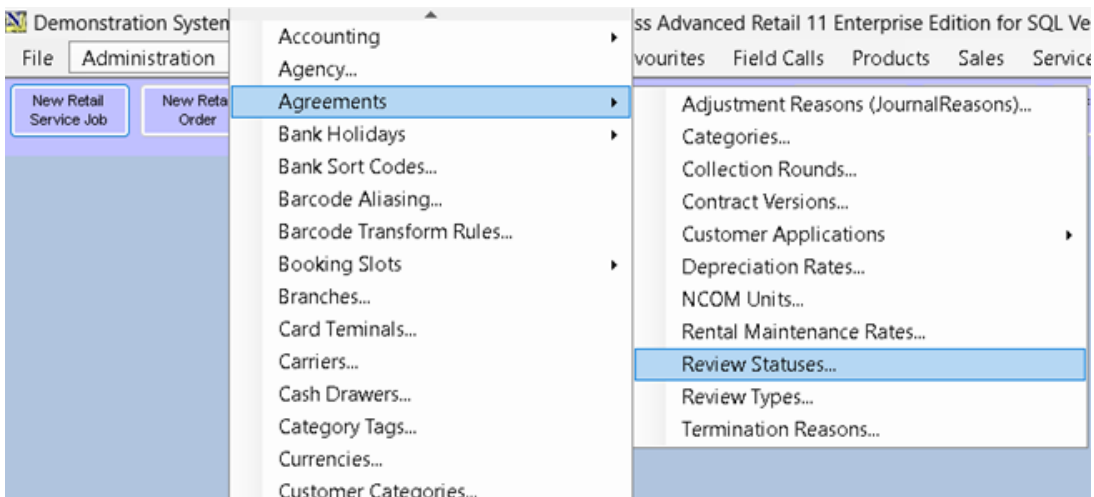


Note: The **Standardise Case** checkbox will tidy your text entry automatically on save.

Setting Up Agreement Review Statuses

Agreement review statuses can be set up from the administration menu.

1. Navigate to **Administration > Agreements > Review Statuses**.



Deleting a Review Status

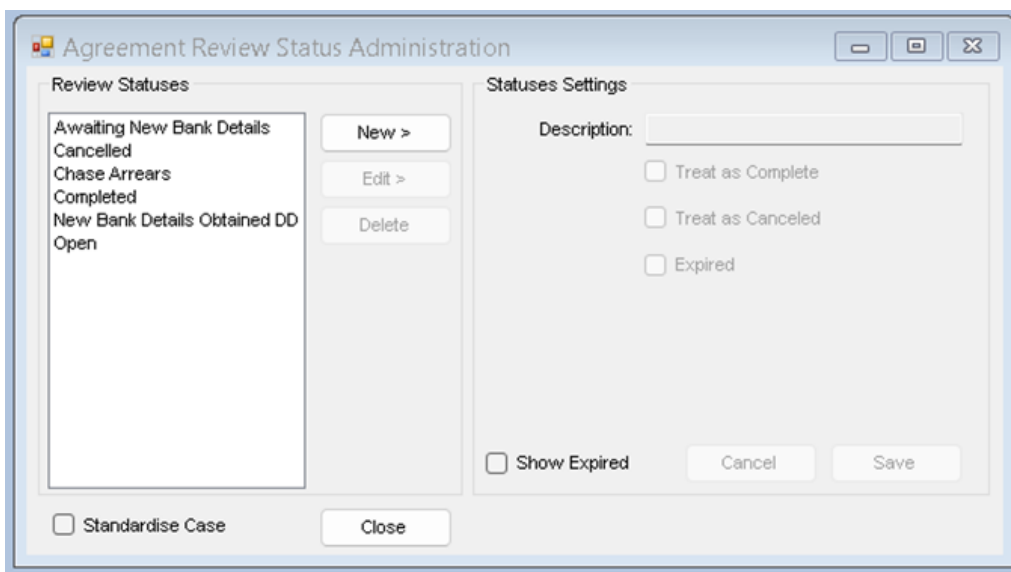
1. Highlight the entry and click **'Delete'** (only available if the review status has not been used).

Editing a Review Status

1. Highlight your entry and click **'Edit'**.
2. You can update the description, change the completion status, or mark it as expired.
3. Click **'Save'**.

Adding a New Review Status

1. Click **'New'**.
2. Enter your description and tick the options you require.
3. Click **'Save'**.



Required Statuses

You will need at least one status with a completed option. It is recommended that you also have at least one with a cancelled option. There will be defaults for these pre-loaded in your system.

- **Treat as Complete** - If this option is set, the review status will mark the review as complete.
- **Treat as Cancelled** - If this option is set, the review status will mark the review as cancelled.
- **Expired** - This will expire the review status so that it can no longer be used.