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renewals

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Contact Renewal Reminders

🕒 Jun 2, 2022 · Knowledge

Contact Renewal Reminders in Fleetio help you keep track of contact-specific activities like license renewals, industry certifications, or other events applicable to individuals affiliated with your business.

NOTE: [Contact Renewal Types \(/s/article/Contact-Renewal-Types\)](#) are added in your [settings \(/s/article/Settings-Overview\)](#).

Add a Renewal Reminder

1. Select **Contacts** from the left sidebar menu.
2. Select a contact from the list, then go to the **Renewal Reminders** tab.
3. Select either the **More Actions** menu, then **+ Add Renewal Reminder**, or select the **More Actions** menu for any reminder that hasn't been set and choose **Add Renewal Reminder**.

[Contact Us](#)

← Contacts

Shaun
Group Email Classifications: Employee, Operator, Technician User Type: Administrator

Overview Vehicle Assignments Equipment Assignments **Renewal Reminders** Work Orders Issues

Q Search All Filters

Type ▲	Status	Due Date	Notification Status
Certification	● Not set	—	—
Contract Renewal	● Not set	—	—
EZ Pass Expiration	● Not set	—	—

Merge ↑
Add Vehicle Assignment 🚗
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Add Renewal Reminder 🔔
Notification Settings 🔔
Watched Vehicles 🚗
Deactivate User Access 👤
View Record History ⌚
Archive 🗑️

Type ▲	Status	Due Date	Notification Status	Comment
Certification	● Not set	—	—	—
Contract Renewal	● Not set	—	—	—

Add Renewal Reminder +

4. Fill in the reminder details. In order to get notifications and emails about "Due Soon" or "Overdue" reminders, switch on **Notifications** and add the users who should be notified to the **Watchers** field.

5. Select **Save**.

IMPORTANT: The contact associated with the reminder is not automatically added as a watcher. Add them as a watcher if you'd like them to receive notifications.

TIP: Want to add multiple Contact Renewal Reminders at once? Check out the [Contact Renewal Reminders Import Guide \(/s/article/Contact-Renewal-Reminders-Import-Guide\)](/s/article/Contact-Renewal-Reminders-Import-Guide) article.

Resolve an "Overdue" or "Due Soon" Reminder

Once the contact has completed the registration or renewal and you want to resolve or renew the reminder:

1. Select **Contacts** from the left sidebar menu.
2. Select a contact, then go to the **Renewal Reminders** tab.

3. Select the **More Actions** menu for the existing reminder, then select **Edit**.

Type ▲	Status	Due Date	Notification Status	Comment
Certification	● Not set	—	—	—
Contract Renewal	● Not set	—	—	—
EZ Pass Expiration	● Not set	—	—	—
License Renewal	● Overdue	Jul 22, 2021 6 months ago	● Active	—
Registration	● Overdue	Jul 23, 2021 6 months ago	● Active	—

Send Notifications

Edit

Delete

4. Update the **Due Date** and select **Save**.

Delete a Reminder

1. Select **Contacts** from the left sidebar menu.
2. Select a contact, then go to the **Renewal Reminders** tab.
3. Select the **More Actions** menu for the existing reminder, then select **Delete**.

Export Contact Renewal Reminder List

Using Fleetio, you can choose to export the Contact Renewal Reminder List to a CSV directly from the list page. Reference [this article](https://help.fleetio.com/help/s/article/Working-With-Your-Data-on-a-List-Page#export-list) (<https://help.fleetio.com/help/s/article/Working-With-Your-Data-on-a-List-Page#export-list>) for more instructions on exporting the list.

Contact Renewal Reminder Reports

A Contact Renewal Reminders report is available in the **Reports** section. The report lists all of the Contact Renewal Reminders that are in Fleetio. Customize the columns to include fields you want to see by selecting the **Columns** drop-down menu. If you have a lot of reminders, use filters to find related records. You can also export, print, and share reports.

Reports / Contact Renewal Reminders Report

Save Share Export CSV Print

Filters 0 filters applied Columns 1-5 of 5

Status	Renewal Type	Due Date ▲	Contact	Group
Overdue	EZ Pass Expiration	08/05/2015	Aaron	001
Overdue	Registration	08/17/2015	Adam	001

NOTE: An **Inactive** label next to the contact name means email notifications won't be sent to that contact for the Renewal Reminder. Subscribe a contact to notifications by toggleing on email notifications in the Renewal Reminder.

[Contacts, Users, and Vendors \(/s/topic/OTO5G0000010yWOW...](/s/topic/OTO5G0000010yWOW...)

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[Contact Renewal Types \(/s/article/Contact-Renewal-Types\)](/s/article/Contact-Renewal-Types)

[Contact Renewal Reminders Import Guide \(/s/article/Contact-Renewal-Reminders-Import-Guide\)](/s/article/Contact-Renewal-Reminders-Import-Guide)

[Service and Renewal Reminder Notifications \(/s/article/Service-And-Renewal-Reminder-Notifications\)](/s/article/Service-And-Renewal-Reminder-Notifications)

[Vehicle Renewal Reminders Import Guide \(/s/article/Vehicle-Renewal-Reminders-Import-Guide\)](/s/article/Vehicle-Renewal-Reminders-Import-Guide)

[Vehicle Renewal Reminders in Fleetio Go \(/s/article/Vehicle-Renewal-Reminders-In-Fleetio-Go\)](/s/article/Vehicle-Renewal-Reminders-In-Fleetio-Go)

[Service Reminders Overview \(/s/article/Service-Reminders-Overview\)](/s/article/Service-Reminders-Overview)

[Contacts Overview \(/s/article/Contacts-Overview\)](/s/article/Contacts-Overview)

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[Vehicle Renewal Types \(/s/article/Vehicle-Renewal-Types\)](/s/article/Vehicle-Renewal-Types)

[Contacts vs. Users Explained \(/s/article/Contacts-VS-Users-Explained\)](/s/article/Contacts-VS-Users-Explained)

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