CHECKLIST

Contract register checklist

The details to record for every contract, and the checks that stop contracts renewing by surprise.

1. Fields to record per contract

Field	What to record	Why it matters
Contract ID	A unique number	Refer to the contract without confusion
Party	Customer, supplier, partner or employee	See all contracts of one party together
Type and direction	Incoming, outgoing or internal; NDA, lease, licence...	The right reviewers and workflow
Owner	One named person	Someone decides on renewal
Start and end date	Plus the renewal date	Know what runs until when
Notice period	And the last day to cancel	No renewal without a decision
Value	Per year or in total	Review the important contracts first
Status	Draft, in review, active, expiring, ended	An overview at a glance
Signed version	Where the signed document is stored	Proof when it matters

2. Ten checks for your contract register

- [ ] **1.** All signed contracts are stored in one place.
- [ ] **2.** Every contract has one owner.
- [ ] **3.** The renewal date and notice period are recorded for every contract.
- [ ] **4.** The last day to cancel is calculated and visible.
- [ ] **5.** The owner gets a reminder well before that day.
- [ ] **6.** The signed final version is stored, not only drafts.
- [ ] **7.** Approvals are recorded: who approved what, and when.
- [ ] **8.** Access is limited to the people involved.
- [ ] **9.** Data processing agreements are linked to the supplier they cover.
- [ ] **10.** New contracts start from approved templates.

3. How to find the last day to cancel

Take the end date of the contract and count back the notice period. Example: a contract ends on 31/12/2026 with a notice period of three months, so your notice must reach the other party by 30/09/2026. Check in the contract whether the period counts from sending or from receipt, and which form is required, for example a registered letter. Set the reminder a few weeks before that day.

4. Which contracts belong in your register

Every agreement with obligations or dates: customer and supplier contracts, framework agreements, leases, software licences and subscriptions, maintenance contracts, NDAs, employment contracts, data processing agreements and insurance policies.

5. Five questions before you renew

1	Do we still need this contract, or is it covered elsewhere?
2	Did the other party deliver what was agreed?
3	Are the price and conditions still right for us?
4	Do the terms still meet our obligations, for example for personal data?
5	Who decides, and by when must the decision be made?

Spreadsheet or contract system?

A spreadsheet works for a handful of contracts and one person. With more contracts, teams and approvals, a system such as M-Files for Contracts records these fields with every contract, sends the reminders and keeps the approval history.

More information and a one-hour demo: softadvice.eu/m-files/contract-management