Reminders

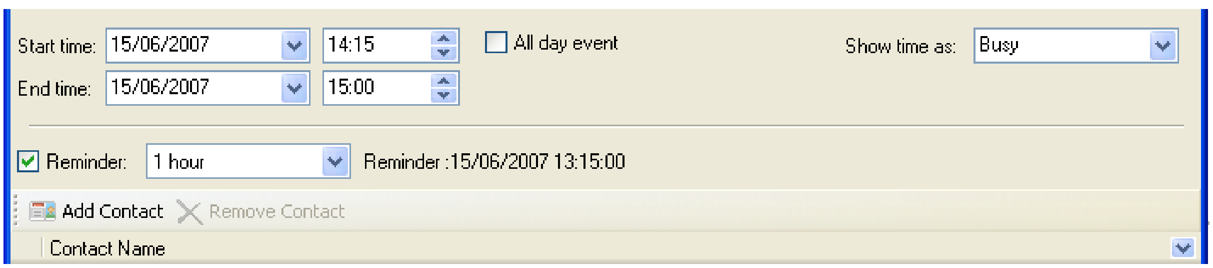
Rem nders are used to ensure appo ntments and meet ngs are not m ssed, and tasks are completed on schedule.

When n t ally start ng Forté CRM, a summary l st prov des a qu ck rem nder of appo ntments and tasks due n the next 7 days. Overdue appo ntments and tasks are also shown.

A rem nder s usually set up when creat ng a new appo ntment or task. A rem nder can also be added to an ex st ng appo ntment or task, f not prev ously set. The t m ng of a rem nder can be changed at any t me.

To create a reminder:

Rem nders are set up on the Appo ntment or Task screen. A rem nder can be set when the appo ntment or task s n t ally created or at any later stage pr or to the appo ntment start t me or task complet on t me.



- If the Rem nder box s not already checked, cl ck on t. A green t ck w ll appear n the box.

- A drop down box conta n ng a l st of t me per ods s used to select when the rem nder s generated. T me per ods range from 0 m nutes up to 2 weeks. One of the allowable opt ons must be selected. If 0 m nutes s selected, the rem nder w ll be d splayed at the due t me of the appo ntment or task.

- For an appo ntment, select how long before the start of the appo ntment you would l ke to rece ve a rem nder. For a task, select how long pr or to the due complet on (or start) t me of the task you would l ke to be rem nded.

- The scheduled date and t me for the rem nder s d splayed.

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To change the scheduled time of a reminder:

- Select the requ red appo ntment or task.
- Select the new t me per od from the drop down box.
- The new scheduled date and t me for the rem nder s d splayed.

To delete a reminder:

- Select the requ red appo ntment or task.
- Cl ck on the Rem nder check box. The green t ck and rem nder deta ls w ll d sappear. A rem nder w ll no longer be generated for th s event. The rema n ng appo ntment or task deta ls are unchanged.

Dealing with Reminders

If you are work ng n Forté CRM, a pop up rem nder w ll be d splayed on the screen at the selected t me. If you are work ng n another appl cat on, a rem nder w ll flash n orange on the task bar at the bottom of the screen. Cl ck on the rem nder tem on the task bar to d splay the pop up rem nder screen.

Current rem nders are d splayed, along w th any prev ous tems that have not yet been dealt w th. The due t me of the appo ntment or task s shown n the rem nder. Cl ck ng on a selected tem w ll show all deta ls for that appo ntment or task.

D sm ss n   Rem nders

A selected tem can be d sm ssed by cl ck ng on the 'D sm ss' button. Th s clears the rem nder from the system. All, or a number of, selected tems can be d sm ssed by cl ck ng on the 'D sm ss All T cked' button.

Sn   ze

The rem nder can be set to d splay aga n at a later t me by us ng the Snoo e funct on. Select the t me per od requ red unt l the next rem nder and cl ck the 'Snoo e' button. The rem nder w ll pop up aga n on the screen at the set t me.

V e   n   tstand n   rem nders

Any rem nders that have not yet been dealt w th can be v ewed by cl ck ng 'Tools' at the top of the screen and select ng 'Show Rem nder'.

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