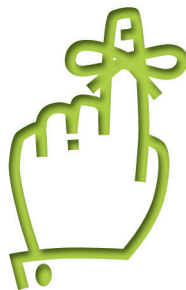# PRINTER'S PLAN

POWER TOOLS

Reminder

POWER TOOL | Reminder

The Reminder tool is designed to remind you of actions to be taken and events that will occur. These actions and events may include:

- Following up quotes,

- Ordering certain items, such as toner for a copier and a part for the folder,

- Calling a customer about a specific job in the shop,

- Meeting with a customer,

- Checking with a vendor about the status of a die-cutting job you have sent out.

The Reminder tool is available in all sections of Printer's Plan.
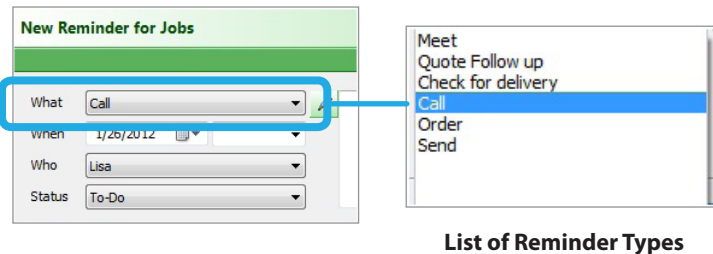
Click the **Reminder** button on the upper-right corner of the Printer's Plan screen to enter a new reminder and to view the existing ones.
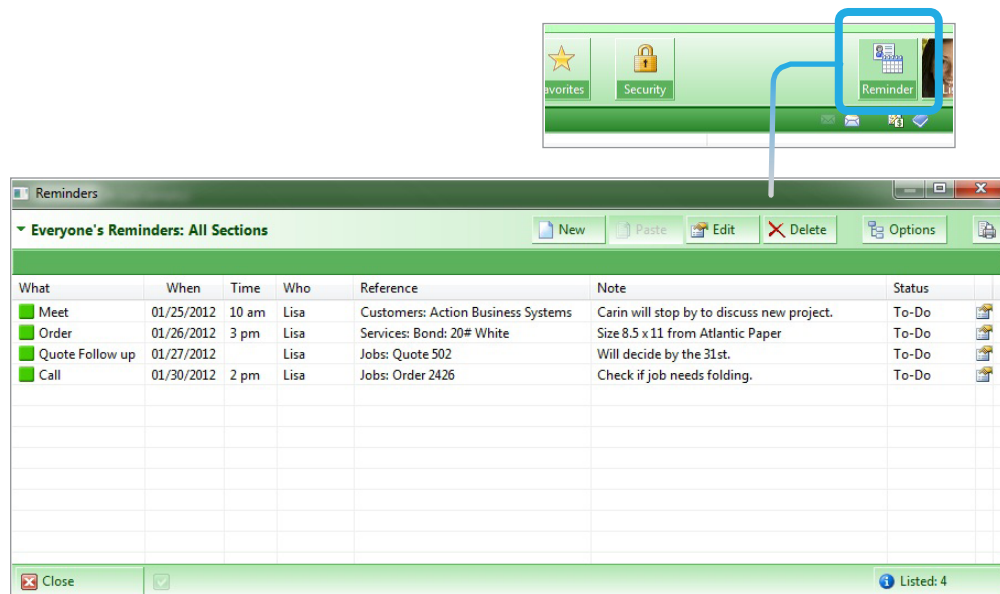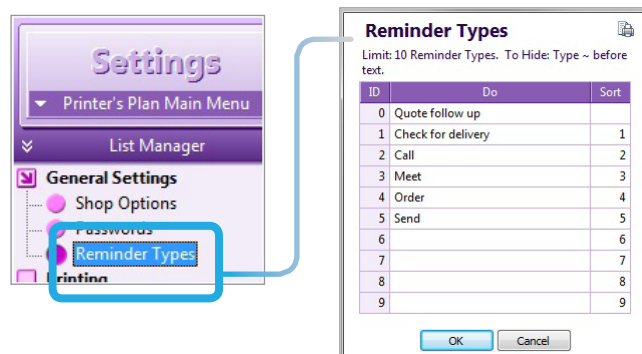

Reminders Window

Fields of the Reminder Window

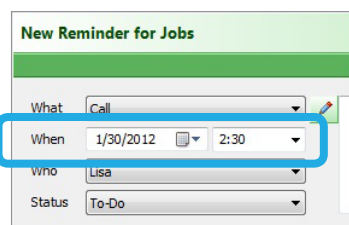**What** field: Click to select the type of the reminder.

List of Reminder Types

You can customize the Reminder Types list in *Settings | General Settings | Reminder Types*.

When fields: Click the first field to select the date of the action about which the reminder is set. In the second field, click the arrow to select the time from the list or enter the time manually. The list of times cannot be modified.

Who field: Click to select the person, for whom the reminder is scheduled, from the customer service reps list.

NOTE: *If the reminder is not scheduled for anyone specific, select "unassigned".*

You can modify the Customer Service Reps list in *Settings | Employees | Service Reps.*
You may also add salespeople or other staff members to this list.

Status field: Select "To Do" when the reminder is active. Select "Done" when the action is completed.

Note field: Enter notes about the reminder.

ENTER THE NOTE IN THIS BOX.

TO ENTER A LONGER NOTE OR VIEW AN EXISTING ONE, TO ASSIGN A DATE AND TIME TO A NOTE, OR TO CLEAR THE NOTE, CLICK THE "PEN" ICON. THE NOTE WINDOW OPENS.

Reminder Note Window

Print icon: Click to print the Reminder window.
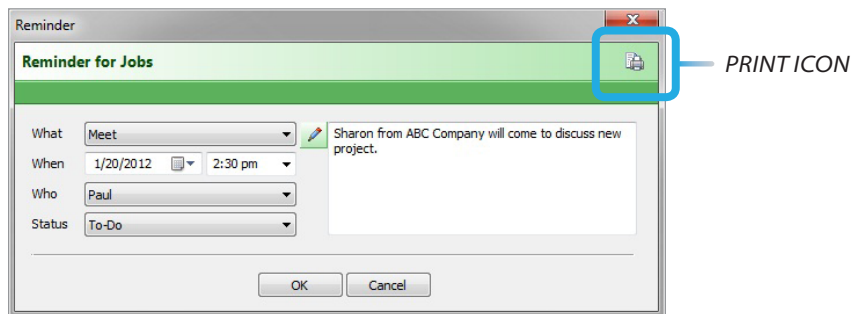
Reminder Window

Reminders Window

Once a reminder is added, it can be viewed from the Reminders window.

The following fields are available in the Reminders window.

CLICK TO ENTER A NEW REMINDER.

CLICK TO EDIT A HIGHLIGHTED REMINDER.

CLICK TO DELETE A HIGHLIGHTED REMINDER.

CLICK TO PRINT THIS WINDOW AS SHOWN.

CLICK TO SELECT WHICH REMINDERS TO DISPLAY. "MY REMINDERS" ARE THE REMINDERS ENTERED FOR THE DEFAULT CSR ASSIGNED TO THIS COMPUTER.

CLICK TO SET THE DEFAULT OPTIONS FOR THE REMINDERS WINDOW. (SEE THE NEXT PAGE FOR THESE OPTIONS.)

THE OPTIONS ARE COMPUTER-SPECIFIC.

LEFT-CLICK ONCE TO OPEN THE REMINDER.

RIGHT-CLICK ANYWHERE IN THE WINDOW TO DISPLAY THIS MENU.

5
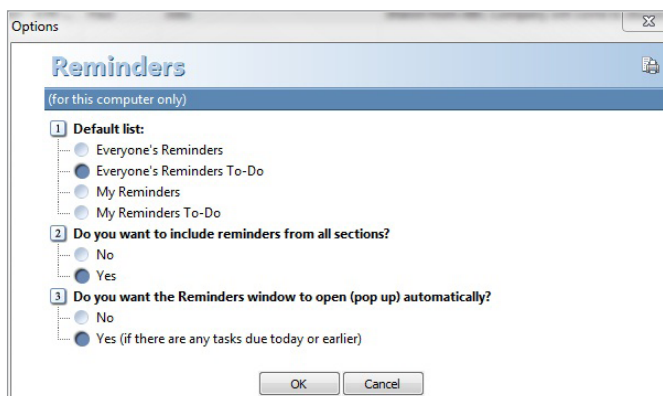
Options List

Reminders Window | Options Window

Default list:

When you open Reminder, the reminders will be listed according to the option selected on this list. To view them in another way at any time, click the button on the upper-left.

Do you want to include reminders from all sections?

If you select "No", then, in each section of Printer's Plan, you will see only the reminders entered in that section.

Do you want the Reminders window to open (pop up) automatically?

If you select "Yes", then, each time you open Printer's Plan, the Reminders window will also open automatically if there are reminders for today or earlier.
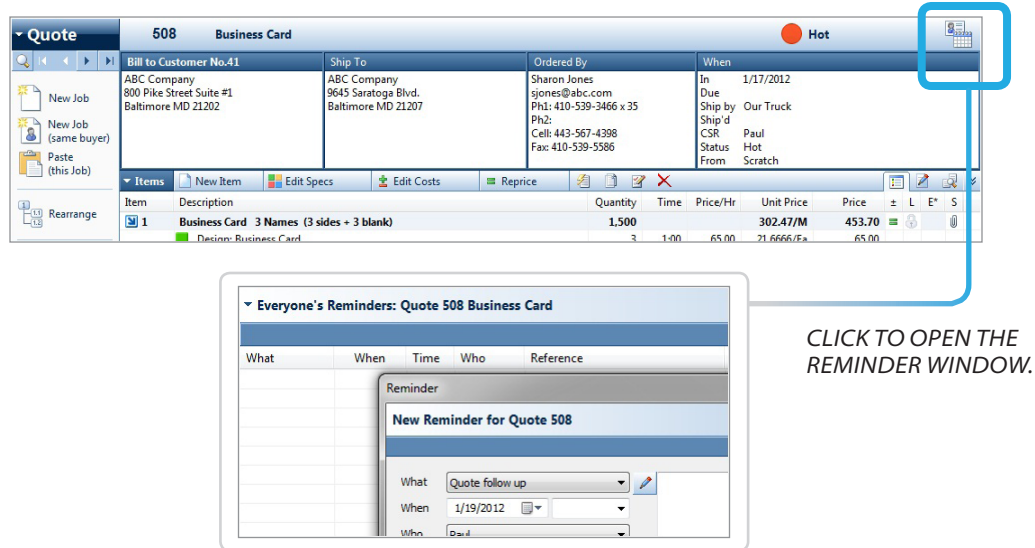
"Done" Reminders

If you have chosen to include the "Done" reminders in the Reminders window, they will show in grey as below:

Reminders for Quotes and Orders

You can enter a reminder for a Quote or an Order in its Job window.
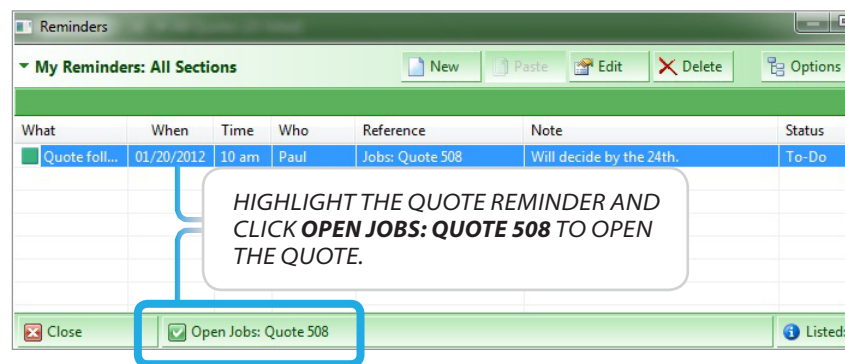
CLICK TO OPEN THE REMINDER WINDOW.

Then, you will be able to easily open this Quote or Order directly from the Reminders window and follow up by phone or email.
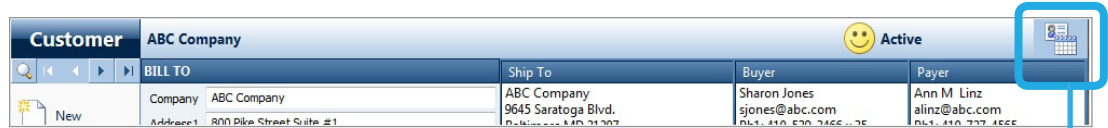
*HIGHLIGHT THE QUOTE REMINDER AND CLICK **OPEN JOBS: QUOTE 508** TO OPEN THE QUOTE.*

Reminders for Customers and Services

You can also enter a reminder for a specific customer or a service from within the customer and service windows respectively.
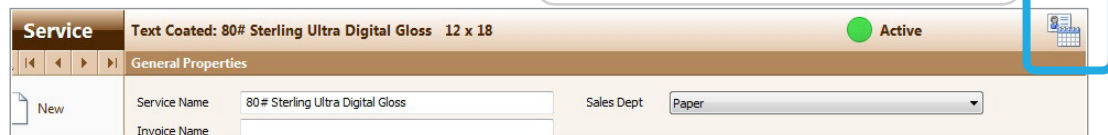
POWER TOOL | **Reminder**

Customers | Customer (ABC Company) window

> *OPEN THE CUSTOMER OR THE SERVICE WINDOW AND CLICK THE REMINDER BUTTON TO ENTER A REMINDER*

Services | Service (Paper: Text Coated) window

Then, the Reminders window will appear as below: