



PRINTER'S PLAN

POWER TOOLS



Reminder

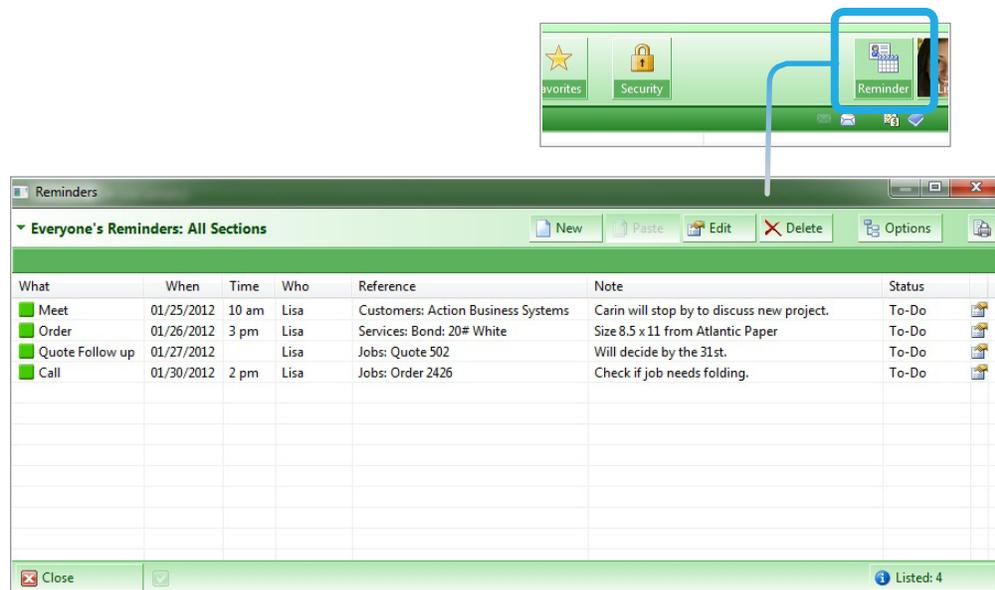
POWER TOOL | Reminder

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.

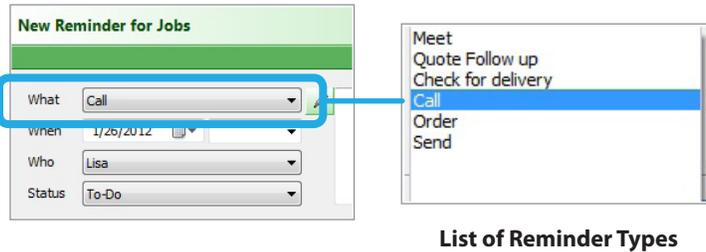
Click the **Reminder** button on the upper-right corner of the Printer's Plan screen to enter a new reminder and to view the existing ones.



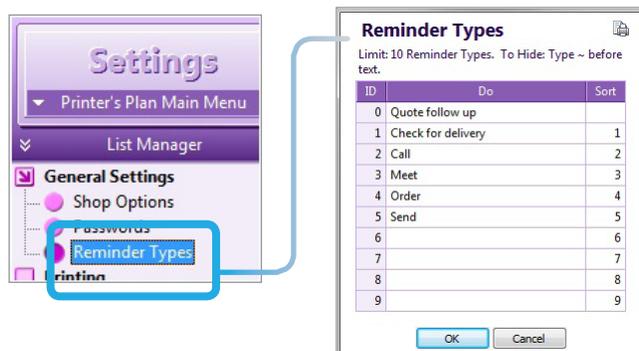
Reminders Window

Fields of the Reminder Window

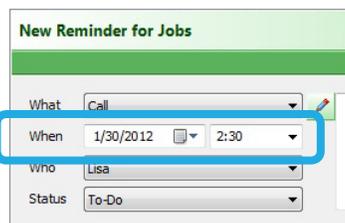
What field: Click to select the type of the reminder.



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

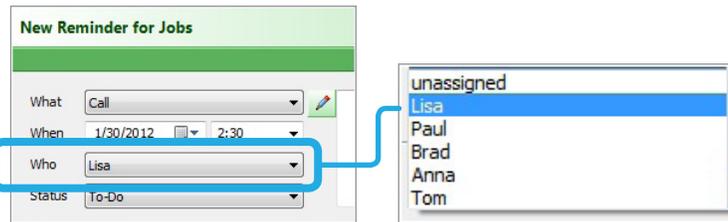


When fields: Click the first field to select the date of the action about which the reminder is set. In the second field, click the arrow to select the time from the list or enter the time manually. The list of times cannot be modified.

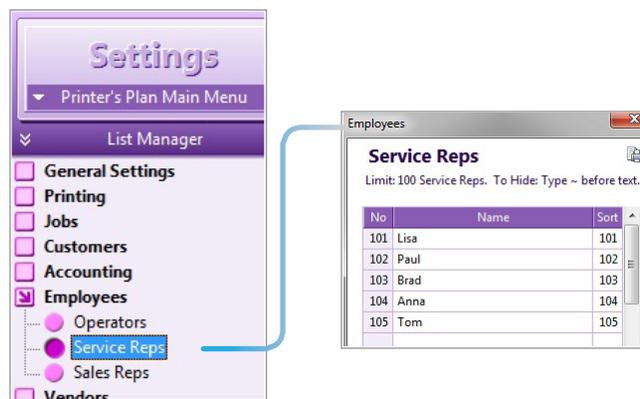


Who field: Click to select the person, for whom the reminder is scheduled, from the customer service reps list.

POWER TOOL | Reminder

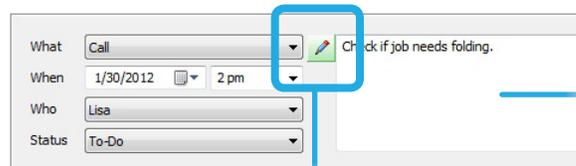


NOTE: If the reminder is not scheduled for anyone specific, select “unassigned”.
 You can modify the Customer Service Reps list in *Settings | Employees | Service Reps*.
 You may also add salespeople or other staff members to this list.

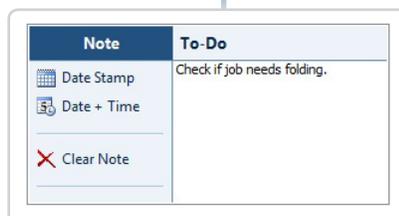


Status field: Select “To Do” when the reminder is active. Select “Done” when the action is completed.

Note field: Enter notes about the reminder.



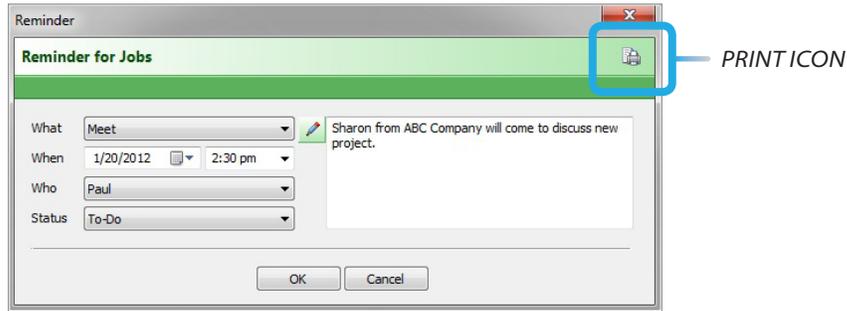
ENTER THE NOTE IN THIS BOX.
 TO ENTER A LONGER NOTE OR VIEW AN EXISTING ONE, TO ASSIGN A DATE AND TIME TO A NOTE, OR TO CLEAR THE NOTE, CLICK THE “PEN” ICON. THE NOTE WINDOW OPENS.



Reminder Note Window

POWER TOOL | Reminder

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.

The image shows a window titled "Reminders" with a green header "Everyone's Reminders To-Do: All Sections". Below the header is a toolbar with buttons for "New", "Paste", "Edit", "Delete", "Options", and a print icon. Below the toolbar is a table with columns: "What", "When", "Time", "Who", "Reference", "Note", and "Status". The table contains one row with the following data: "Meet", "01/20/2012", "2:30 ...", "Paul", "Jobs", "Sharon from ABC Company will come to discuss new...", and "To-Do".

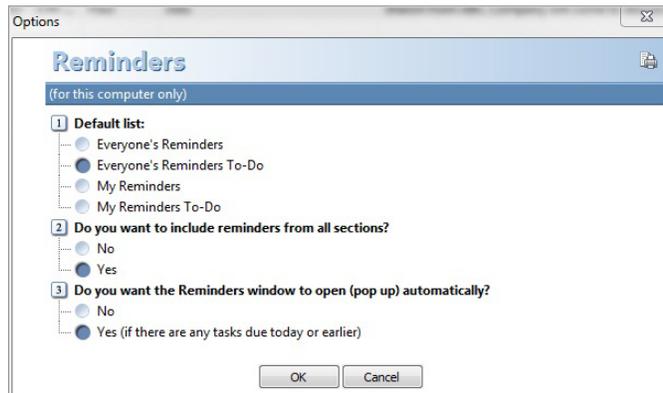
Callouts and their descriptions:

- CLICK TO ENTER A NEW REMINDER.** (Points to the "New" button)
- CLICK TO EDIT A HIGHLIGHTED REMINDER.** (Points to the "Edit" button)
- CLICK TO DELETE A HIGHLIGHTED REMINDER.** (Points to the "Delete" button)
- CLICK TO PRINT THIS WINDOW AS SHOWN.** (Points to the print icon)
- CLICK TO SELECT WHICH REMINDERS TO DISPLAY. "MY REMINDERS" ARE THE REMINDERS ENTERED FOR THE DEFAULT CSR ASSIGNED TO THIS COMPUTER.** (Points to the "Everyone's Reminders To-Do: All Sections" dropdown)
- CLICK TO SET THE DEFAULT OPTIONS FOR THE REMINDERS WINDOW. (SEE THE NEXT PAGE FOR THESE OPTIONS.) THE OPTIONS ARE COMPUTER-SPECIFIC.** (Points to the "Options" button)
- LEFT-CLICK ONCE TO OPEN THE REMINDER.** (Points to the print icon in the table row)
- RIGHT-CLICK ANYWHERE IN THE WINDOW TO DISPLAY THIS MENU.** (Points to a context menu)

The context menu shown includes the following items:

- New
- Open
- Set Status: To-Do
- Set Status: Done
- Delete...
- Refresh F5

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:

My Reminders: All Sections							
What	When	Time	Who	Reference	Note	Status	
<input type="checkbox"/> Order	01/26/2012	3 pm	Lisa	Services: Bond: 20# White	Size 8.5 x 11 from Atlantic Paper	To-Do	
<input checked="" type="checkbox"/> Quote Foll...	01/27/2012		Lisa	Jobs: Quote 502	Will decide by the 31st.	Done	
<input checked="" type="checkbox"/> Call	01/30/2012	2 pm	Lisa	Jobs: Order 2426	Check if job needs folding.	Done	

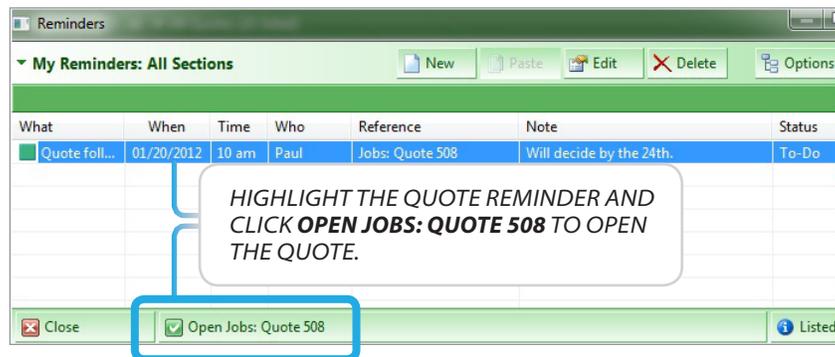
Reminders for Quotes and Orders

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.



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

Customer ABC Company Active

BILL TO		Ship To	Buyer	Payer
Company	ABC Company	ABC Company	Sharon Jones	Ann M. Linz
Address1	800 Pike Street Suite #1	9645 Saratoga Blvd.	sjones@abc.com	alinz@abc.com
			DL1-410-520-2466	DL1-410-737-4566

Customers | Customer (ABC Company) window

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

Service Text Coated: 80# Sterling Ultra Digital Gloss 12 x 18 Active

General Properties

Service Name	80# Sterling Ultra Digital Gloss	Sales Dept	Paper
Invoice Name			

Services | Service (Paper: Text Coated) window

Then, the Reminders window will appear as below:

Reminders

Everyone's Reminders: All Sections

What	When	Time	Who	Reference	Note
Call	01/19/2012		Paul	Services: Text Coated: 80# Sterling Ultra Digital Gloss	Contact xpedx and Kelly to check prices.
Meet	01/20/2012	9 am	Paul	Customers: ABC Company	Sharon will come to discuss new project.