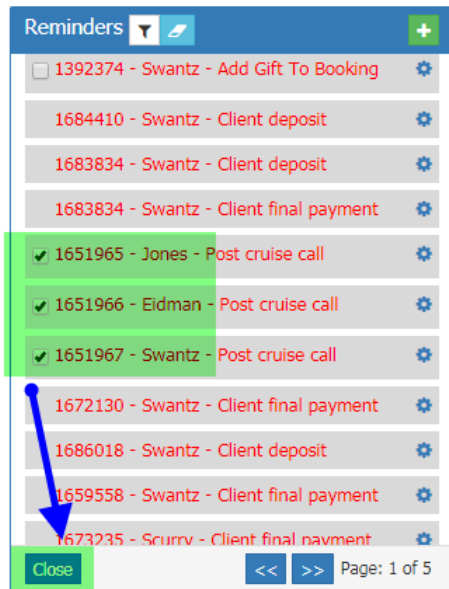


Updates to Reminders July 13, 2017 Release

From the Reminders screen, you are able to select one or more items you wish to **Close** by checking the box to the left of any eligible Reminders; press **Close** to close all selected reminders in one action. (Financial reminders would not be eligible for 'bulk' closing.)

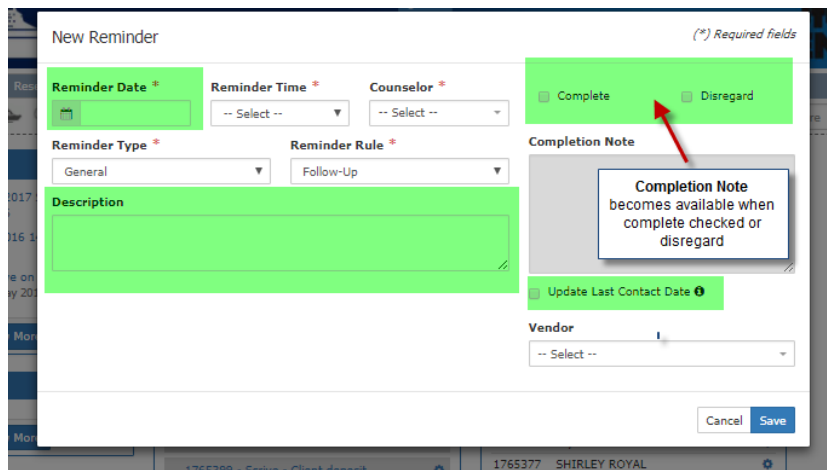


Reminders

☐	1392374 - Swantz - Add Gift To Booking	⚙
☐	1684410 - Swantz - Client deposit	⚙
☐	1683834 - Swantz - Client deposit	⚙
☐	1683834 - Swantz - Client final payment	⚙
☒	1651965 - Jones - Post cruise call	⚙
☒	1651966 - Eidman - Post cruise call	⚙
☒	1651967 - Swantz - Post cruise call	⚙
☐	1672130 - Swantz - Client final payment	⚙
☐	1686018 - Swantz - Client deposit	⚙
☐	1659558 - Swantz - Client final payment	⚙
☐	1673235 - Scurry - Client final payment	⚙

Close << >> Page: 1 of 5

Some new features were added to the **New Reminder** screen. When you click on the '+' sign, the pop-up for the **New Reminder** screen will appear.



New Reminder (*) Required fields

Reminder Date * -- Select --

Reminder Time * -- Select --

Counselor * -- Select --

Reminder Type * General

Reminder Rule * Follow-Up

Description

Completion Note

Complete Disregard

Completion Note becomes available when complete checked or disregard

Update Last Contact Date

Vendor -- Select --

Cancel Save

A **Description** field is now available for users to populate with notes relating to the Reminder.

Two new designations appear in the top-right side of the screen: **Complete** and **Disregard**. You may check these when appropriate. When either of these two designations are 'checked', the new **Completion Note** field will become available for use.

The **Reminder Date** area has changed a bit; a default date of today will no longer populate. This will require the user to select the actual reminder date.

When editing reminders within a reservation, a **Note** box will become available for use when the **Completed** or **Disregard** boxes have been checked.

Edit Reminders

☐ Open ☒ All

Date	Time	Activity	Description	Guest	Status
< NEW >					
31 Jan 2017		Client deposit			Open
01 Feb 2017	5:00 PM	new test reservation lead 30 may 2017			Open
03 Feb 2017		Vendor deposit - Norwegian Cruise Line (...)			Open
06 Jul 2017		Client final payment			Open
12 Jul 2017	2:00 PM				Open
19 Jul 2017		Vendor final payment - Norwegian Cruise ...			Open
17 Sep 2017	10:00 AM	Add Gift To Booking			Open

Date
31 Jan 2017
Description
Client deposit
Reminder
Follow-up

Time
Type
Reservation

Customer Deposit Date
Note

☐ Completed ☐ Disregard
☐ Update Last Contact Date

***Tip:** The 'wheel' to the right of a Reminder, when clicked, will present you with the option to **Go to Reservation** or **Edit Reminder**.

