

Document Management Search

System Configuration>Reports>Document Management

Search	
Add	
Edit	
Delete	
Print Grid	

Document Management Search

Search

Add

Edit

Delete

Print Grid

Doc No:

Description:

Reference:

Module:

System Configurati

Year:

All

Month:

All

<<

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Page

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of 0

>

>>

No data to display

#	Att	M..	Doc No	Description	Reference	Year	Month	Module	Name	Created By	Date Time	Last User	Last User ...	Notes
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Doc No:	
Description	
Module	
Year	
Reference	
Month	

Adding or Editing Document Management

Document Management

Search

Add

Doc No:

Description:

Module:

System Conf

Year:

All

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of

#	Att	M..	Doc No
1			DOC5
2			DOC6
3			DOC7
4			DOC8
5			DOC9
6			DOC34

Attachments

Memo

Create Reminder

View Attachments

Close

Doc No:

DOC52

Description:

FY2024

Reference:

VAT Returns

Year:

2024

Month:

May

Module:

System Configurati

Name:

User Created:

Date And Time:

Last Updated By:

Date And Time:

Notes:

Testing

Save And New

Save And Close

Save

Close

Attachments	
Memo	
Create Reminder	
View Attachments	
Doc No	
Description	
Reference	
Year	
Month	
Module	
Name	
User Created / Date and Time	
Last Updated By / Date and Time	
Notes	

Create Reminder

This screen is where you **set up and manage a reminder**.

Attachments

Memo

Create Reminder

View Attachments

Close

Reminder Detail

Attachment

Memo

Send Message

Recurring Reminders

Job Link

Print Reminder

Close

Reminder No:

ACCK8

Complete ?:

☐

Customer:

Supplier:

Date Created:

Reminder Date:

2026-06-12

Reminder Type:

Reminder for Job - JOB5312

Reminder To:

Acck Support

Add Recipients

Restrict View:

☐

Message Choice:

☒ Normal ☐ SMS ☐ Email

Reminder From:

Acck Support

Contact Person:

Interaction Type:

Cell No.:

Job No. Link:

JOB5312 -

Email:

Reference:

Description:

Save & Close

Save

Close

Reminder No	A unique reference number generated by the system for this reminder.
Customer	Link the reminder to a customer.
Date Created	Automatically populated once the reminder is saved , showing when the reminder was created.

Reminder Type	Automatically links the reminder to the job (e.g. <i>Reminder for Job – JOB5312</i>).
Reminder To	Choose who the reminder is assigned to.
Restrict View Tick	Limits visibility to certain users.
Reminder From	The user or team creating the reminder.
Interaction Type	This field is used to categorise the type of reminder or follow-up so it can be tracked and filtered more easily. You can select from the following options: • Clients – General client-related follow-ups • Email – When the reminder relates to sending or responding to an email • General – For standard or uncategorised tasks • Leads – Follow-ups related to new business or opportunities • Meeting – Reminders for scheduled meetings • Sales – Sales-related tasks or follow-ups • Telephone Calls – When a call needs to be made • URGENT – High-priority items that require immediate attention
Job No. Link	The job the reminder is attached to.
Reference	Add a short title/subject.
Description	Enter details about what needs to be done.
Complete Tick	Tick once the task is finished.
Reminder Date	Select Date you wish to be reminded on
Add Recipients	Optional – add additional people to receive it.
Message Choice	Choose how the reminder is sent: • Normal (system alert) • SMS • Email
Contact Person	Populate the Contact Person
Cell No	Display or allow entry of the Cell Number
Email	Display or allow entry of the Email address

Recurring Reminders

Reminder Detail

Attachment

Memo

Send Message

Recurring Reminders

Reminder No: PG5

Customer: 1020 - test

Date Created: 2024-05-17 14:10:00

Reminder Type: Reminder for Document

Reminder To: Paige Granville

Restrict View: ☐

Reminder From: Paige Granville

Interaction Type:

Job No. Link:

Manage Recurring Reminders

Recurring Reminders

Reminder Date: 2024-05-18

Frequency Selection:

☒ Number Of Days

☐ First Day Of

☐ Last Day Of

Number Of Days: 1

Number Of Reminders: 1

Continue

Close

Reminder Date	
Frequency Selection	
Number Of Days	
Number Of Reminders	

Add Recipients

Reminder Detail

Attachment

Memo

Send Message

Recurring Reminders

Reminder No: PG6

Complete ?:

Customer:

Supplier:

Date Created:

Reminder Date:

Reminder Type: Reminder for Job - JOB4694

Reminder To: Paige Granville

Add Reci...

Restrict View:

Message Choice:

Reminder From: Paige Granville

Contact Person:

Interaction Type:

Cell No.:

Job No. Link: JOB4694 -

Email:

Reference:

Description:

Save & Close

Save

Close

Manage Recipients

Add Reminder Recipients

Page 1 of 1

Displaying 1 - 21 of 21

#		First Name	Last Name	Email Address
1	☐	Victor	Bohmer	malcolm@stormtrader.c...
2	☐	Pamela	Dean	pamela@erpsolutions.co...
3	☐	Gavin	F	sogob94743@konican.c...
4	☐	Malcolm	Granville	malcolm@erpsolutions.c...
5	☐	Paige	Granville	paige@webaccounting.c...
6	☐	Harry	Jones	h.jones@anywhere.co.za
7	☐	Thabile	Khumalo	thabile@hugesoftware.c...
8	☐	Thabile	Khumalo	thabile@hugesoftware.c...
9	☐	Thabile2	Khumalo	thabile@hugesoftware.c...
10	☐	Chris1	L	tkb5tu+2yqpuvq7xl9vo...
11	☐	Otsile	Loate	otsile@hugesoftware.co....
12	☐	Philip	Matthews	p.matthews@anywhere....
13	☐	Imraan	Salijee	imraan@hugesoftware.c...
14	☐	Andrew	Skene	abdrew@iafrica.com
15	☐	Peter	Smit	peter@webaccounting.c...
16	☐	Chris	Stone	chris@stormtrader.co.nz
17	☐	Acck	Support	malcolm@stormtrader.c...
18	☐	Super	User	faheema@webatar.co.nz
19	☐	TEST100	USER TESTER	imraan@hugesoftware.c...
20	☐	Arlecia	van Rooyen	vicki.brophy.as@gmail.c...
21	☐	Gerrit	van Rooyen	qerrit@webaccounting.c...

Save & Close

Close

Revision #4

Created 17 May 2024 09:33:41 by Paige

Updated 10 June 2026 22:51:10 by Pamela