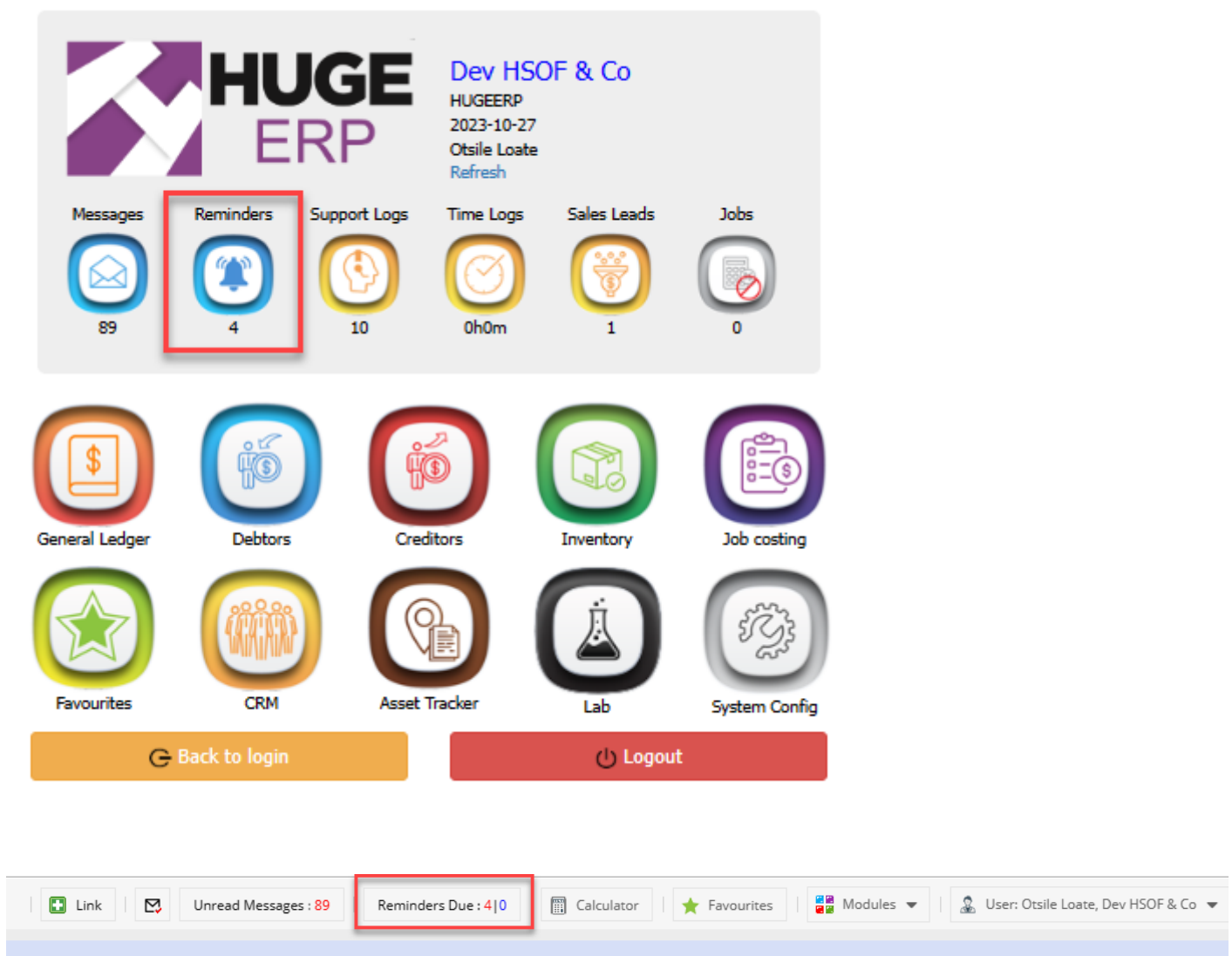


Creating Reminders

Reminders

Reminders are essential to ensure no critical tasks or important dates are overlooked. Whether it's managing deadlines, tracking project milestones or staying on top of compliance requirements, reminders simplify the process and help you maintain better control over your business operations.

You can find reminders on your landing page or click on any module on the landing page and the reminders will appear on the top bar.



Adding a Reminder

[Reminders](#) > [Add](#) > [Add Reminder](#)

Add Reminder

Reminder Detail

Attachment
Memo
Send Message
Recurring Reminders
Job Link
Print Reminder

Reminder No:
OL2
Complete ?
☐

Customer:
ABC007 - ABD Company
Supplier:

Date Created:
2023-10-27 09:39:45
Reminder Date:
2023-10-28

Reminder Type:
General Reminder

Reminder To:
Thabile Khumalo
Add Recipient
1 Additional Recipient Selected

Restrict View:
☐
Message Choice:
☐ Normal
☐ SMS
☒ Email

Reminder From:
Otsile Loate
Contact Person:

Interaction Type:
Leads
Cell No.:
036 259 20585

Job No. Link:
JOB4641 - Building A
Email:
ost@abd.co.za

Reference:
New Leads

Description:
Contact new sales leads

Save & Close
Save
Close

Reminder Number	The reminder number is generic
Customer	Select a debtor/ customer
Date Created	Date created is the date you created the reminder on
Reminder Type	Is generic
Reminder To	The person to whom the reminder is directed to
Restrict View	Restrict the people who will have access to view the reminder by ticking the boxReminder to
Reminder From	The person sending the reminder
Interaction Type	Select the correct interaction type for your reminder on the dropdown

Job Number: Link	Link a job number if you use job costing
Reference	Short describing of the reminder
Description	Full description of the reminder
Complete	Only put a tick on complete once the reminder is no longer valid
Supplier	
Reminder Date	This is the date the reminder will be sent out
Add Recipient	Add the recipient of the reminder
Message Choice	Choose how you want the reminder to be sent to a recipient If you are sending a reminder to yourself or someone in your organisation leave message choice as normal If you are sending to an external cellphone number or email address then select the correct choice
Contact Person	Select a contact person on the dropdown if this is an external reminder
Cell Number	Add cellphone number you want the reminder to be sent to
Email	Add the email address you want the reminder to be sent to

Reminder Navigation Buttons

Recurring Reminders	You can click recuring reminders to setup recurring reminders
Job Link	Click a Job Link to a Job Number you selected
Print Reminder	Click print reminder to print a reminder or to email a copy

Recurring Reminders

Recurring Reminders serve as notifications that inform you about upcoming, regular activities that need to be performed within the Huge ERP system.

Recurring reminders serve as a digital assistant, helping you keep track of critical, ongoing tasks such as inventory replenishment, expiring quotes, sales leads follow-ups financial reporting and maintenance schedules.

The screenshot displays the 'Edit Reminder' window in a software application. A 'Manage Recurring Reminders' dialog box is open in the foreground, allowing users to configure recurring reminders. The dialog includes the following fields and options:

- Reminder Date:** A text field containing '2023-10-28'.
- Frequency Selection:** Three radio button options: 'Number Of Days', 'First Day Of' (which is selected), and 'Last Day Of'.
- Select Period:** A dropdown menu currently set to 'Week'.
- Number Of Reminders:** A numeric input field set to '2'.
- Buttons:** 'Continue' and 'Close' buttons at the bottom of the dialog.

In the background, the 'Reminder Detail' form is visible, showing fields for 'Reminder No.', 'Customer', 'Date Created', 'Reminder Type', 'Reminder To', 'Restrict View', 'Reminder From', 'Interaction Type', 'Job No. Link', 'Reference', and 'Description'. The 'Reminder No.' field contains 'OL2'.

Reminder Date	Reminder Date will populate from the reminder detail screen
Frequency Selection	Select the frequency of the reminder
Select Period	Select the duration of the recurring reminders
Number of Reminders	Select the number of days that you wish to have the reminder repeated and the number of occurrences that the reminder must be repeated

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