

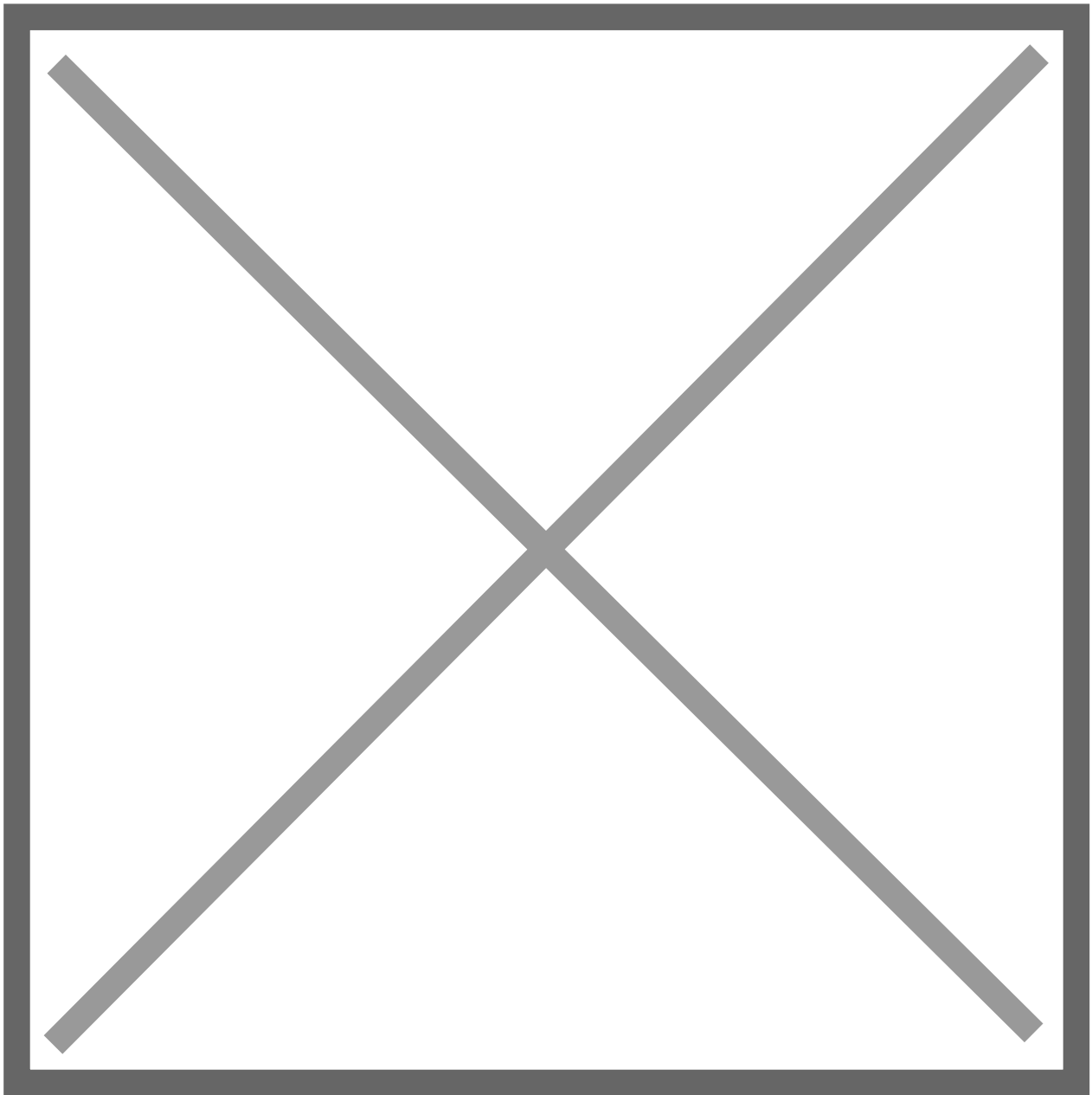
New Reminder

After clicking on the Plus + button

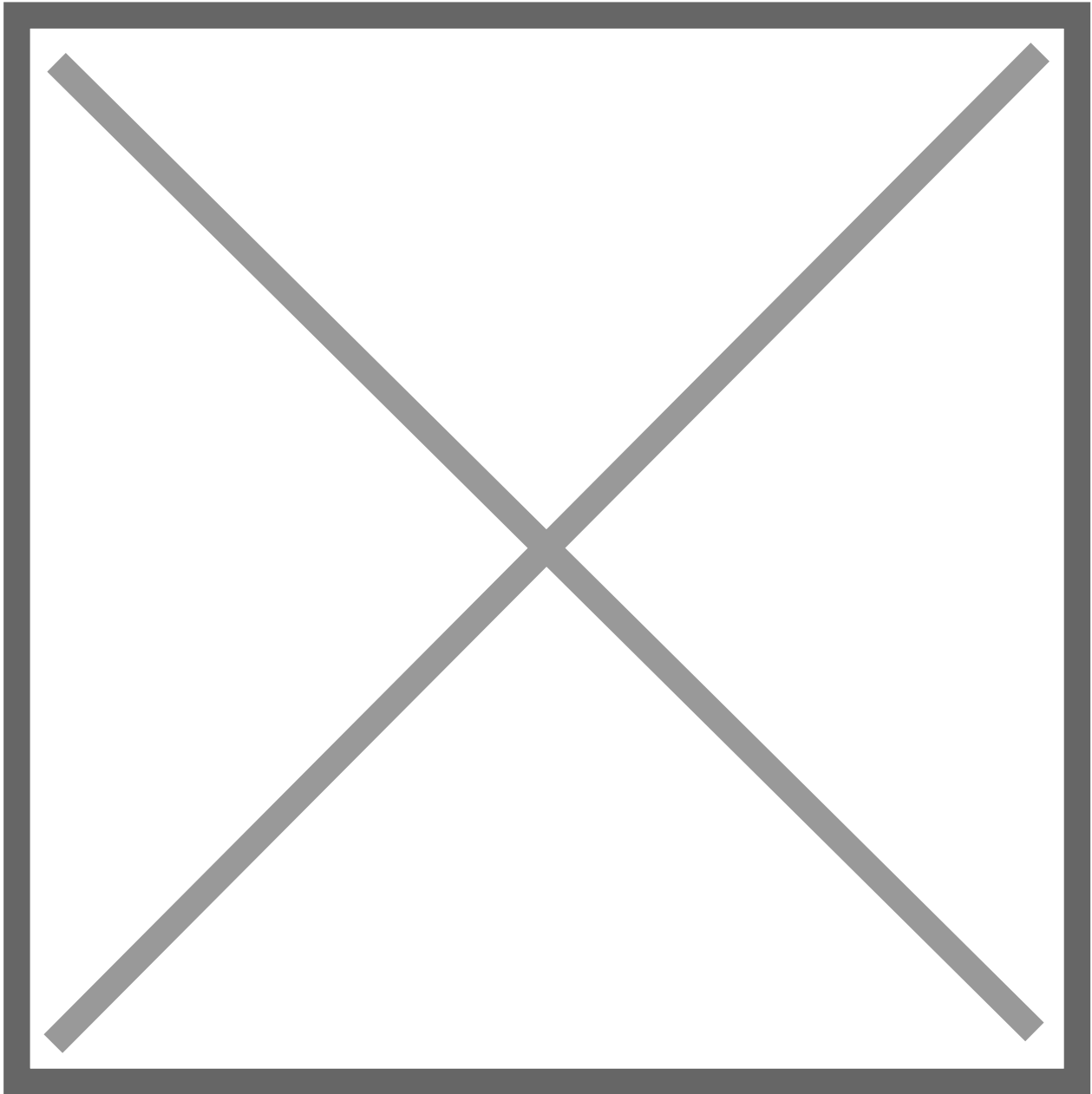
Reference	add a short note on what the reminder is about
Copy button	copy the reference to the notes section
Date	To days date will be the default
Client	select the client the reminder is linked to
Employee	this is defaulted to you, alternatively you can create a reminder for another staff member.
Notes	enter more information on the reminder
Interaction Type	send the reminder via email, sms or email and sms

Click on the tick to save the changes before going to next screen.

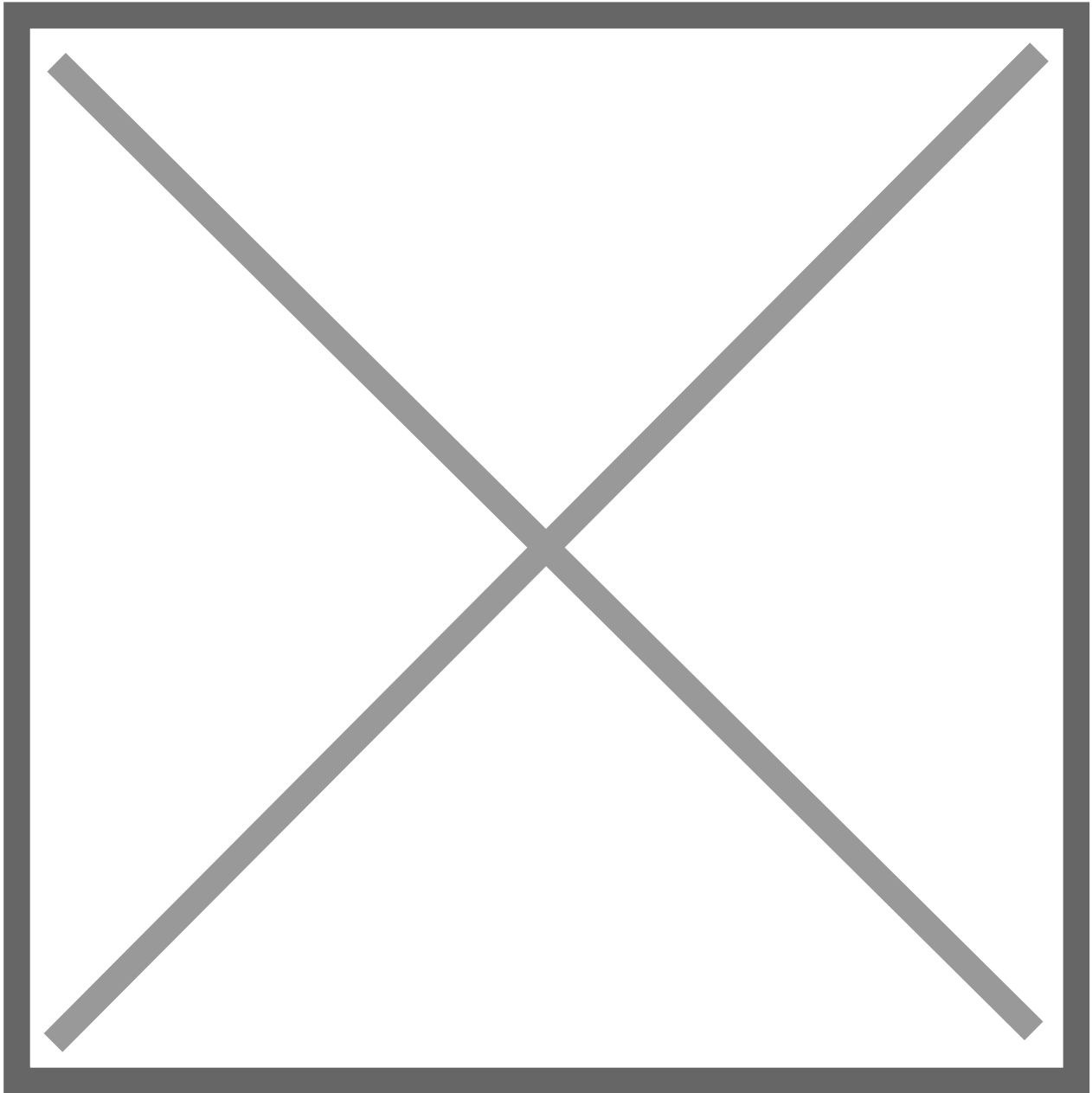
Client Visit button	create a client visit from a reminder
Complete button	Close the reminder
Email button	email the reminder to notify the other employee of the reminder



After saving, one can add an attachment



Once saved, sync to the server



Revision #2

Created 27 July 2023 21:29:28 by Paige

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