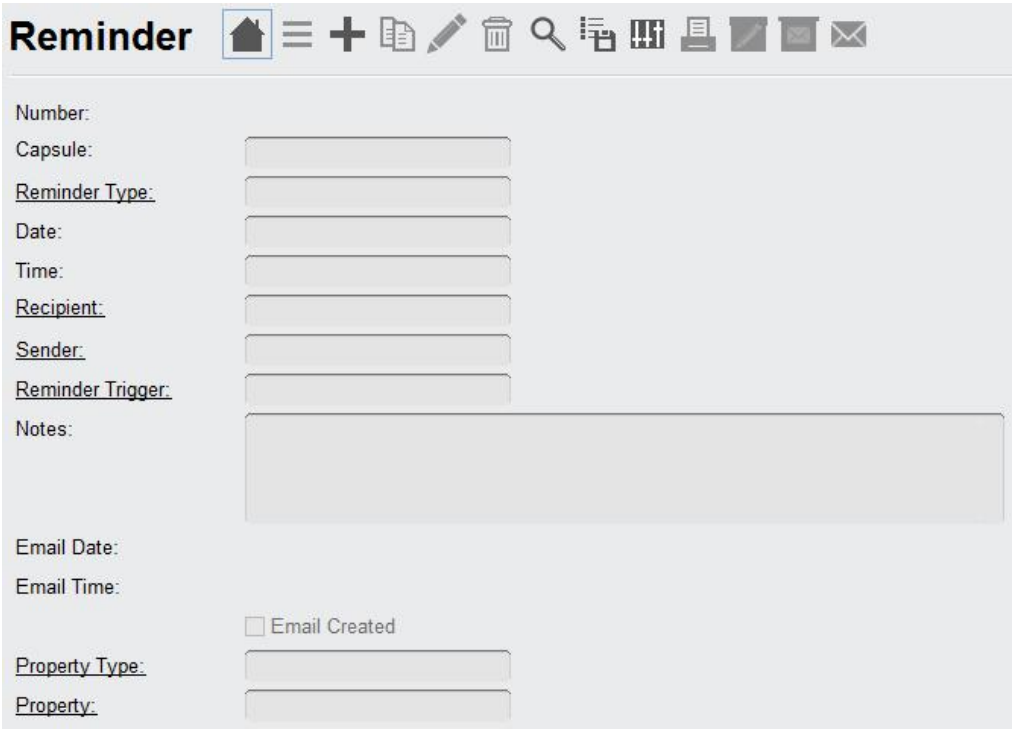
Reminders

Reminders are created to indicate critical key dates, highlight outstanding issues, or simply to create to-do lists.

Reminders can be configured to send automated messages (Reminder Triggers) based upon the **Reminder Type** and the **Reminder Date/Time.**

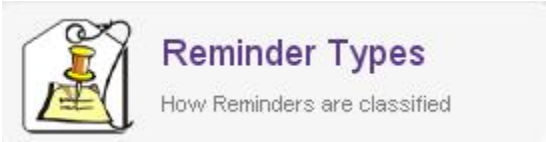


Reminders can be added directly into the reminder capsule, or via the Detail List at the bottom of all records throughout the AwareManager. Most Reminders are associated with other records in the program (such as a work records, purchase orders, insurance certificates, clients, or contacts). Keep in mind you can create multiple Reminders for the same record.

Examples:

- An insurance certificate record may have a reminder that will notify you 60 days before the expiration of a certificate.
- A client may have a reminder 90 days prior to lease expiration.
- A staff contact may have a reminder 60 days before their license/accreditation expires.

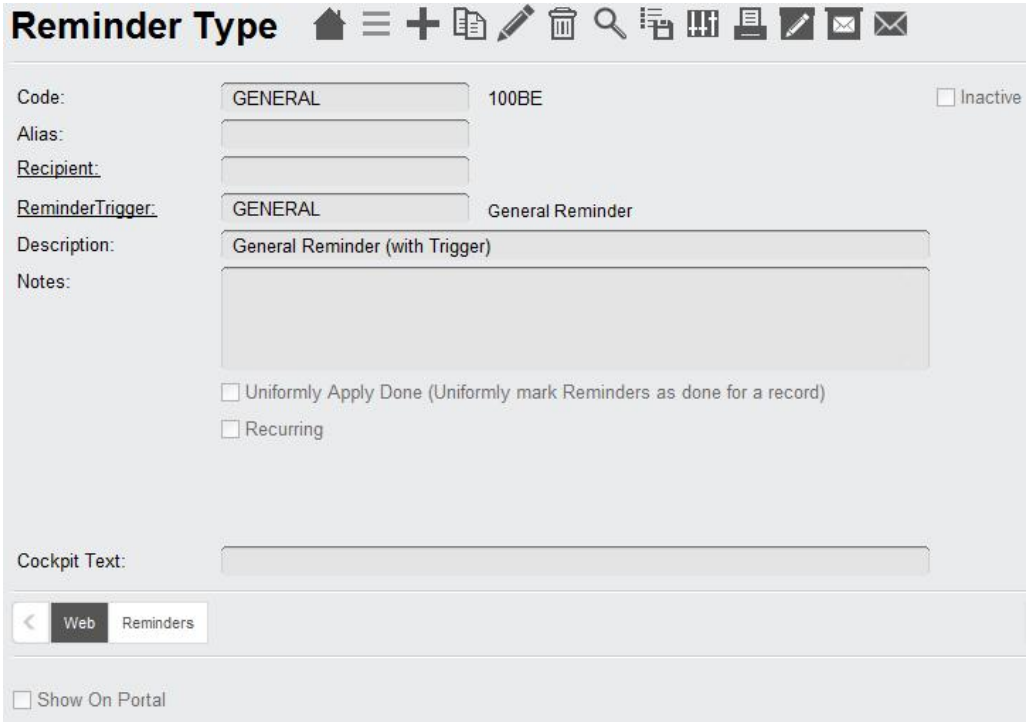
Reminder Types



Reminder Types are used to categorize the reminders you plan to enter into the reminder capsule.

For example: This can be used to differentiate between vendor expirations for Insurance Certificates versus following up on a past due work order.

The use of this capsule is optional, however it is recommended to help in grouping your reminders. Also, an important feature of Reminder Types is the ability to default a Reminder Trigger based upon the Reminder Type.



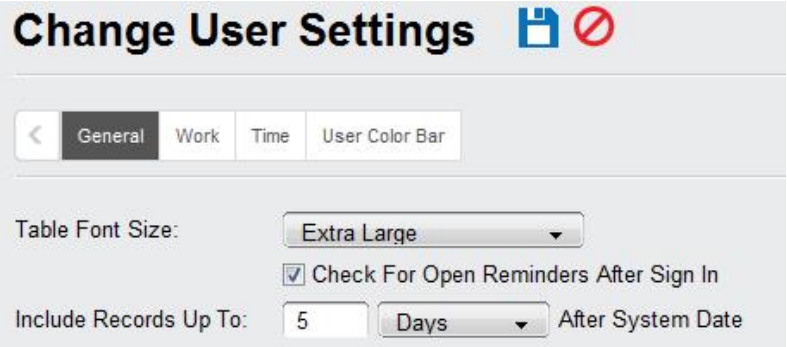
- **Uniformly Apply Done:** this will automatically click all reminders as Done within a single record if the first is selected as Done and includes this preference (via the Reminder Type).
- **Recurring:** if the Recurring box is checked off, new fields will appear for Frequency and Recurring Base Date. Once a Recurring reminder is done it will automatically create another reminder based upon the Frequency and Recurring Base Date.
- **Show on Portal:** this will display the notes section of a particular reminder as a notice on the new portal.

Reminder Types can be configured to default the following:

- **Recipient**: if the same person will receive all reminders of that type.
- **Reminder Trigger**: if you want the system to send an email notification to the Recipient.

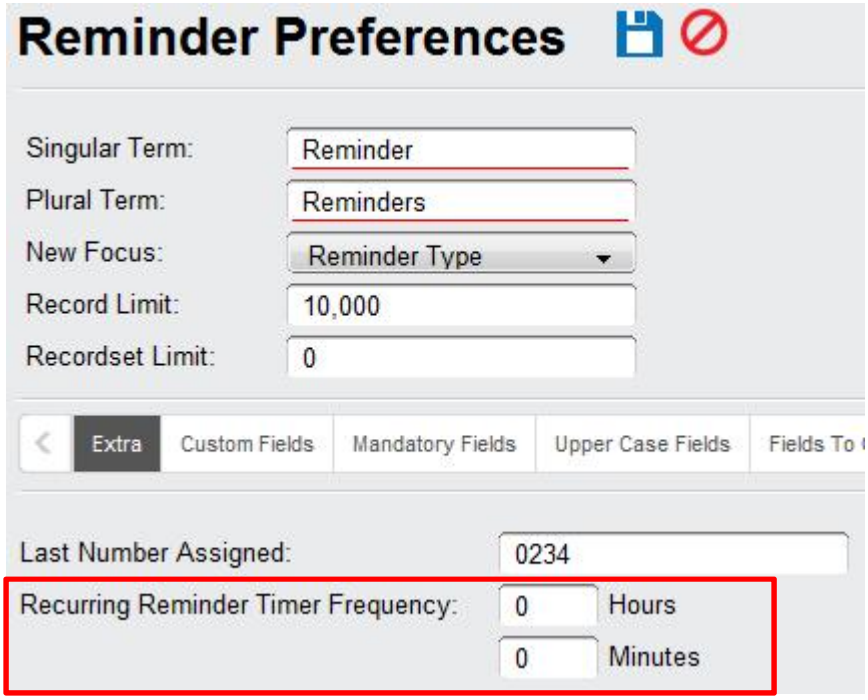
Automatic Notification of Reminders

Any user can automatically be notified of any outstanding reminders when they log onto the system.



To set this up:

1. 1. Go to **Settings→User Settings** from the main Console.
2. 2. Click on the **Check For Open Reminders After Sign In** check box.

Reminder Preferences

This preference controls the frequency for sending recurring reminders.