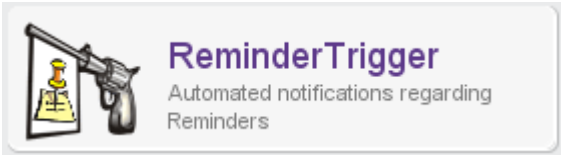
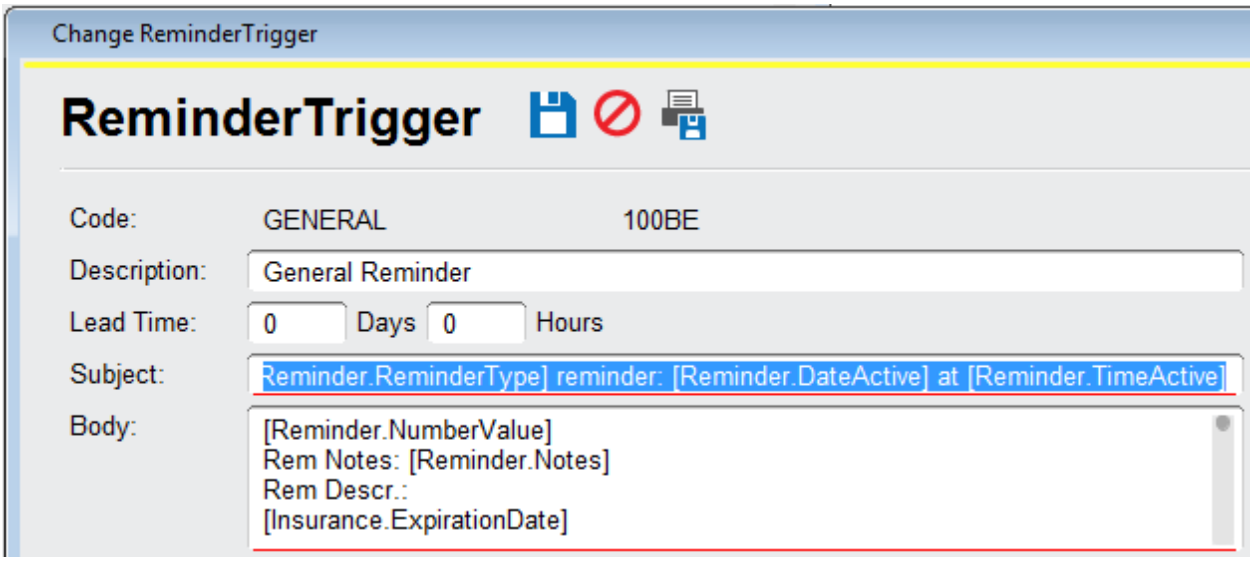
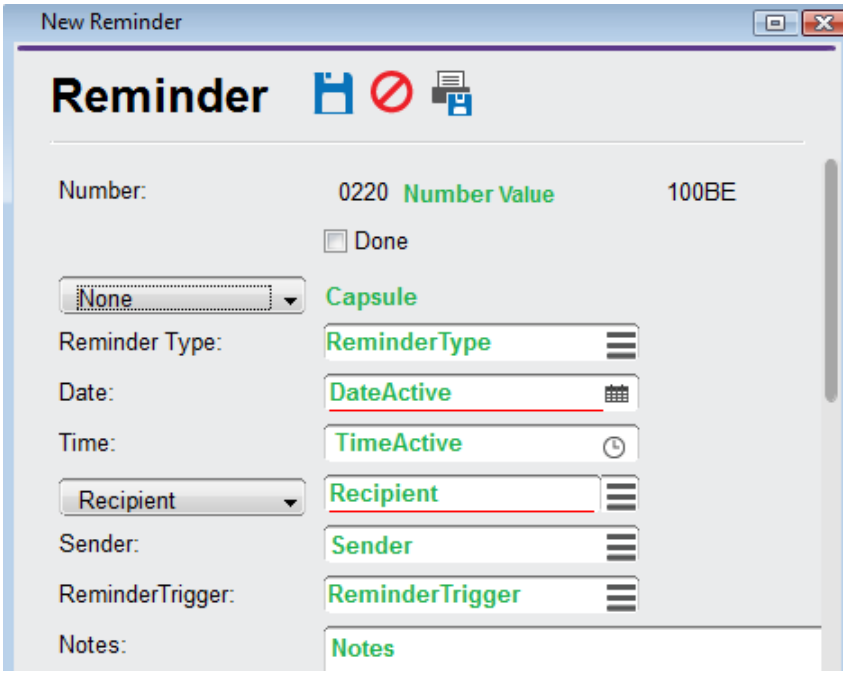
Reminder Triggers

The Reminder Trigger capsule allows you to set up your reminders to notify you when an item is due or in need of attention via email. The Reminder Trigger can default based upon the Reminder Type, or you can enter the Reminder Trigger directly into the reminder





The Lead Time controls how long before the Reminder Date / Time the triggered email will be sent out. For instance, if a Reminder is set for Sept 1 but you want the email to be sent out 30 days in advance, you would set the Lead Time at 30 Days.



Subject / Body fields

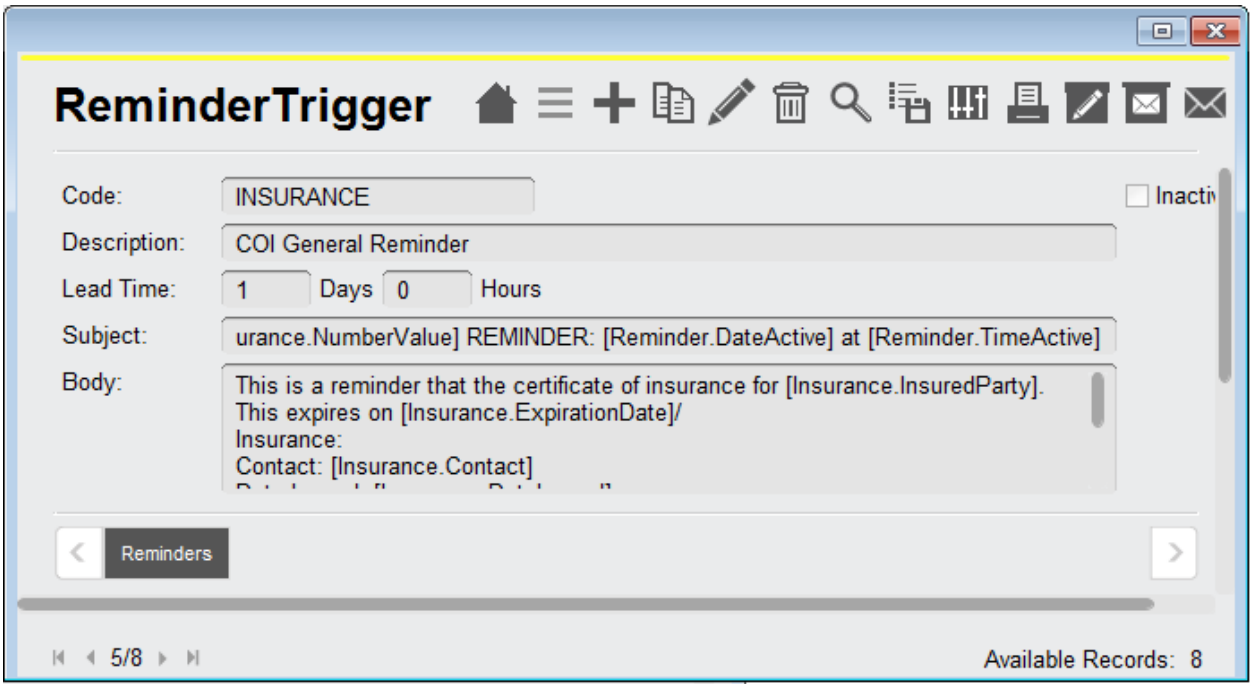
The Subject and Body fields can reference any fields from the Reminder record OR from the parent record the Reminder is linked to.

To reference the Reminder record, you can use the following fields in green with brackets:

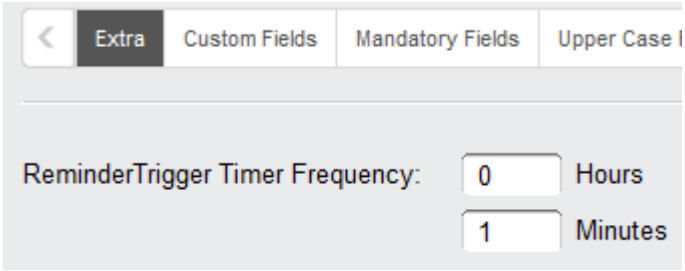
For Example: To display the Number you would type: [Reminder.NumberValue]

Custom Fields: Custom Field01, Custom Field 02, etc.

The Reminder Trigger can also reference any field from the record to which the Reminder is linked.
For instance, if the following Reminder Trigger is linked to a Reminder belonging to an Insurance record, the resulting email will contain the fields that are bracketed.



If you would like to set this feature up, contact your Client Manager so they can help you with the bracketed terms that will allow you to reference various fields.

Reminder Trigger Preferences

The Reminder Trigger preferences contain an important setting called Timer Frequency. This controls how often the system checks for Reminders that need to be triggered. For databases using the Reminder Triggers extensively, we suggest having the system check every 1-5 minutes.