Reminders

- General
- Execution criteria
- Email Content
- Recipients

Reminders are scheduled notifications that are set to be sent to whomever listed in the notification, for whichever purpose and with the chosen template from Document Template Manager.

In order to reach the functionality available through reminders, we need to go to:

Dashboard Ribbon Menu > Launch > Reminders

This will bring up the list of reminders that are either scheduled to be sent and/or can be sent manually. We can add a reminder by clicking new > reminder from the ribbons menu on top right.

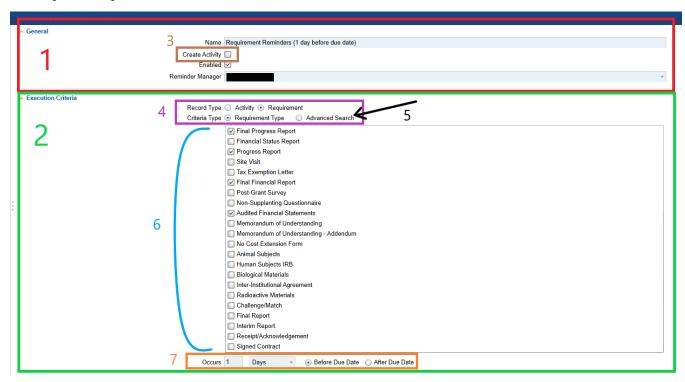It will bring the following screen which we need to fill out:
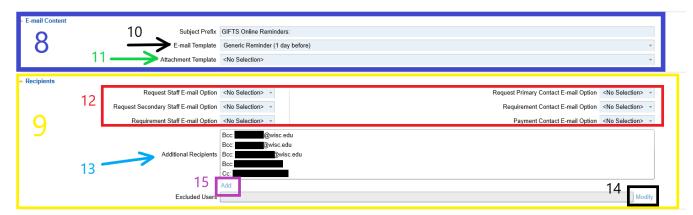

Image 1 - General and Execution Criteria

Image 2 - Email Content and Recipients Sections

General

Shown in red box (1) at the top of the first image above. This section has the preliminary information such as the name. Also, if you would like to create activity, make sure the related checkbox is checked.

Execution criteria

Shown in green box (2) at the bottom of the first image above.

This section requires the type record as well as Criteria Type to be filled shown in pink box (4).

Advanced Search under Criteria Type (shown in image with the black arrow with number 5 beside it) will bring the search module by clicking the 'Modify' link.

Other choice than Advanced Search under Criteria Type will bring the list of choices shown with the blue curve(6). Choosing them will generate a notification per selection. For example, the same recipient will receive one notification for Financial Report and another one for Progress Report.

Email Content

Shown in purple box (8) at the top of the second image above.

Here you can choose a template for the email itself (black arrow number 10) or a template as an attachment (green arrow number 11) or both from Document Template Manager. The subject of the email can be prefixed here also.

Recipients

Shown in yellow box (9) at the bottom of the second image above.

On this section, the reminder can either be sent to certain role(s) shown in red box number 12 on the second image, or to specific recipients (blue arrow number 13) by clicking the Add link below that (pink box number 15). It can also be set to exclude certain recipients by clicking the Modify link (black box number 14) beside the Excluded Users shown at the bottom of the second image.