

Reminders

Reminders are calendar based action items that can be associated with any Property, Trade, Fixture, Client, or Contract. They can be used to issue a new Survey, Create a new Work Order, or Renew a Contract.

Creating a reminder is as easy as going to the page of an item you want to remind yourself of visiting. Touch the bell in the top right navbar.



This will bring up the Reminder Form.

New Reminder ×

Subject

! Priority?

Message

For Me Plus Everybody?

Repeating?

Date of Reminder

You must at least give your reminder a subject. Messages are for more details and may require the user to click deeper into the reminder to see. A priority message is red and at the top of a list of reminders.

Revision #1

Created Wed, Jul 14, 2021 9:51 PM by Joe Smith

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