Print Reminders for a Day/Date Range

1. Click the **Reports** ribbon tab from the top of your screen.
2. Click the **Contacts** button and choose **Total Reminders**.
3. Set a date range for your report.
4. **[Optional]** Click the checkbox next to Specific User if you would like to generate a report for a specific user; otherwise, reminders for all users will be displayed.
5. Optionally include Linked Event Information and Inactive Reminders.
6. Choose to view in Details or Summary format by clicking the appropriate radio button.
7. **[Optional]** Choose to group the reminders by a particular detail.
8. Click **OK** to generate the report.

See Printing Reminder Lists

Print Contact History Notes for One Account

1. Click the **Contact Manager** button from the **Main** sidebar.
2. Search for and select the desired account.
3. Click the bottom portion of the **Prints** button at the top of the screen.
4. Click **Contact Manager** and choose **Contact History**.
5. From the Print Preview which displays, click the **Print** button.

See Printing Contact History Notes

Print Contact History Notes for a Day/Date Range

1. Click the **Reports** ribbon tab from the top of your screen.
2. Click the **Contacts** button and choose **Total Contacts Made**.
3. Set a date range for your report.
4. **[Optional]** Click the checkbox next to Specific User if you would like to generate a report for a specific user; otherwise, contact history notes for all users will be displayed.
5. Optionally include Linked Event Information.
6. Choose to view in Details or Summary format by clicking the appropriate radio button.
7. **[Optional]** Choose to group the reminders by a particular detail.
8. Click **OK** to generate the report.

See Printing Contact History Notes

Additional Resources

Using the Contact Manager Grid
Viewing and Editing Automatic Reminders
Deleting Your Inactive Reminders
Inserting Merge Fields into an Automatic Reminder Message
Retrieving Linked Reminders into a Manager

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Quick Reference Guide:

Contact Manager

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Create a New Reminder in Event Manager

1. Click the **Event Manager** button from the **Main** sidebar.
2. Search for and select the desired event.
3. Click the **New Reminder** button , located on the toolbar at the bottom of the screen (or from your **Tools** menu).
4. Complete the reminder detail fields by typing directly into the fields or by clicking the down arrow to the right of each field and choosing an option.
5. Type what you would like to be reminded of into the Message text block.
6. Click **OK**.

See Creating a New Reminder from Event Manager

Create a New Contact History Note in Event Manager

1. From an event in Event Manager, click the **New Contact History Item** button , located on the toolbar at the bottom of the screen (or from your **Tools** menu).
2. Complete the requested information within the Contact fields.
3. Type the contact history action into the Comment text block or access the Scratch Pad to insert pre-formatted text.
4. Click **OK**.

See Creating a New Contact History Note from Event Manager

View Contact History in Event Manager

1. From an event in Event Manager, click the **Reminders and Contact History** button , located on the toolbar at the bottom of the screen (or from your **Tools** menu).
2. Click the **Contact History** tab.
3. Click on the contact history item you would like to view. (Click the Current Event Only checkbox to view contact history related to the current event only.)
4. Click the **View Comment** button to view the action details.
5. Optionally click on the **Reminders** and **Emails Sent** tabs to view reminders that have been created and e-mails that have been sent, respectively.

See Viewing Reminders and Contact History in Event Manager

Re-Send E-mails from Contact Manager

1. Click the **Contact Manager** button from the **Main** sidebar.
2. Search for and select a Client/Organization.
3. Click the **Emails Sent** tab, located at the bottom of the screen.
4. Click on the e-mail you would like to resend.
5. Click the **Resend Email** button , located on the right-hand side of the window.
6. Click **OK** at the informational prompt.
7. Reattach any prints or files to the e-mail.
8. Click **Send**.

See Re-Sending Emails from Contact Manager

Create Automatic Reminders

1. From an event in Event Manager, click the **Administration** ribbon tab at the top of the screen.
2. Click **Options** > **Automatic Reminders Setup.**
   Note: You may also click the **Automatic Reminders Setup** button from Contact Manager.
3. Click the **Add New Auto-Reminder** button , located at the top right-hand side of the window.
4. Click the down arrow at the right of the first field on this screen and choose an action to trigger the creation of the reminder.
5. Click the days, weeks, or months drop-down list and select a date to link the auto-reminder to.
6. Click the down arrow to indicate whether the number of days you selected is to occur before or after the reminder date and time.
7. Click the down arrow to indicate whether the reminder pertains to Event Date, Booked Date, or Revised Date.
8. Fill out any desired informational fields.
9. Type the reminder message into the Message text block.
   Note: Optionally insert merge fields into the reminder by clicking the **Insert Merge Fields** button and selecting merge fields from the list.
10. Click **OK**.

See Creating Automatic Reminders

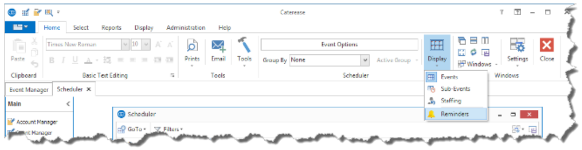
Use the Active Reminders Tool

1. Click the **Tools** sidebar.
2. Click the **Active Reminders** button.
3. Click any reminder on the Reminders form.
4. **[Optional]** Click the **Details** button to view extended details about the reminder.
5. **[Optional]** Snooze or dismiss the reminder.
6. **[Optional]** Retrieve the reminder into the desired "Manager" by clicking the **Select** button.
7. Click **OK.**

See Viewing Active Reminders

View Reminders in the Scheduler

1. Click the **Scheduler** button from the **Main** sidebar.
2. Click the **Display** button from the top of the Scheduler window and choose **Reminders**.
3. **[Optional]** Click the down arrow next to **Group By**, at the top of the window, and choose Status, User, Category, Location, or None.



See Viewing Reminders in the Scheduler

Print Reminders for One Account

1. Click the **Contact Manager** button from the **Main** sidebar.
2. Search for and select the desired account.
3. Click the bottom portion of the **Prints** button, located at the top of the screen.
4. Click **Contact Manager** > **Reminders**.
5. From the Print Preview which displays, click the **Print** button.