

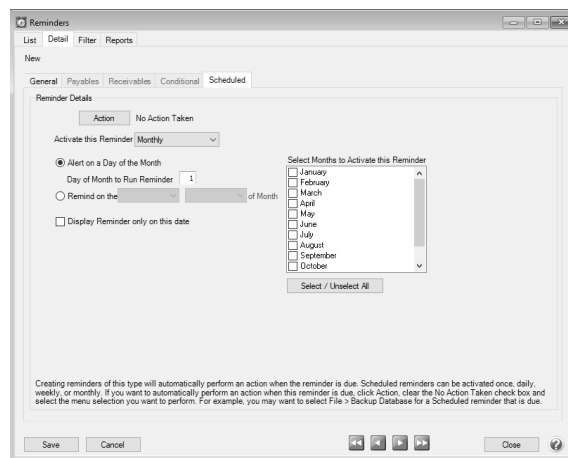
Scheduled Reminders

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Scheduled reminders can be activated once, daily, weekly, or monthly. For example, if you'd like the system to remind you to post a recurring batch of automatic withdrawal transactions, you would set that reminder up as a scheduled reminder on the date they are withdrawn. The Scheduled Reminder can be set to automatically perform an action when a reminder is due.

Create a Scheduled Reminder

1. On the **Setup** menu, click **Reminders**.
2. Click **New**.
3. In the **Message** box, enter up to 50 characters of a required message.
4. In the **Type** box, select **Scheduled Reminders**. In the **Description** box, enter a details about the reminder.
5. Click the **Scheduled** tab.



The screenshot shows the 'Reminders' dialog box with the 'Scheduled' tab selected. The 'Reminder Details' section has the 'Action' button highlighted. The 'Activate this Reminder' dropdown is set to 'Monthly'. The 'Alert on a Day of the Month' radio button is selected, with 'Day of Month to Run Reminder' set to '1'. The 'Select Months to Activate this Reminder' list is open, showing all months from January to December. The 'Select / Unselect All' button is visible at the bottom of the list. The 'Save' and 'Cancel' buttons are at the bottom of the dialog.

6. Under **Reminder Details**, if you want to automatically perform an action when this reminder is due, click **Action**, clear the **No Action Taken** check box and select the menu selection you want to perform. For example, you may want to select Processes > Batch Transactions when this scheduled reminder is due.
7. In the **Activate this Reminder** box, select the frequency that you want this reminder activated for; Once, Daily, Weekly, or Monthly.
8. Depending on the option selected in the Activate this Reminder box, complete the additional details requested. Such as, Alert on a Day of the Month, Run Every # weeks, Display Reminder only on this date, etc.
9. If Daily or Monthly is selected in the Activate this Reminder box, the **Select All/Unselect All** button can be used to help select the days/months the reminder is activated.
10. Click **Save** to save the reminder and return to the List tab, or click **Close** to save the reminder and close the Reminders screen.