

Conditional Balance Reminders

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The Conditional Balance Reminder applies a filter to a specific condition that can then display a reminder only when the condition is met. For example, if you want to be reminded when a customer's balance is greater than a set dollar amount, or if you want to be reminded that you owe a specific vendor a dollar amount.

Create a Conditional Balance 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 Conditional Balance Reminders.

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- 5. In the **Description** box, enter a detailed description about the reminder.
- 6. Click the Conditional tab.
- 7. Under **Select a Filter**, select a filter to apply a condition to, for example, select Name or Account. Accounts can easily be moved from Available to Selected, using the green arrow buttons.
- 8. Under Define Filter Criteria, select the Account for this reminder.
- 9. Click Add Filter.
- 10. 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 > Sales > Receipts or Processes > Purchases > Pay Invoices due or Reports > Reports for a Conditional reminder that is due.
- 11. Click **Save** to save the reminder and return to the List tab, or click Close to save the reminder and close the Reminders screen.