Reminders

Reminders are email notifications which contain messages related to the item. Usually, they are used to inform selected users or groups of users about coming deadlines or other important milestones for the item. You can set multiple reminders per item, and you can create periodic reminders for repeating activities related to the item.

Viewing item’s reminders

There are two different ways to view current item’s reminders: one using the Reminder button in the item and one using the user menu.

Method 1. Using the Reminder button on an item.

- Click the Reminder button. The pop-up window will appear, which displays the list of reminders set for the item and basic information about each of the reminders.

   ![Screenshot: Pop-up window with item's reminder information]

Method 2. Using user menu

1. On the user menu, click Item Reminders;
2. In the grid containing item reminders, find reminders related to the required item.

Creating Item Reminders

To Create a Reminder

1. Click the Reminder button on an item.
2. In the pop-up window, click the Add button.

   ![Screenshot: Pop-up window]

The “Set Reminder” window will appear.
3. In the “Set Reminder” window, in the **Reminder** textbox, enter the name of the reminder.

4. In the **Start Date** field, enter the date when the reminder will have to trigger for the first time.

5. If you want to make this reminder periodic:
   - Check the **Repeat** checkbox;
   - In the **Cycle** list, select the periodicity of the reminder;
   - Select one of the **Ends** options to specify condition when the reminder has to expire; (by default the option “Stop reminder when item is closed” is checked)

6. In the **Recipients** list, indicate each user who has to receive the reminder.

7. If you want the reminder to contain a message, provided by a specific reminder template, in the **Select Reminder Template** list, select a required template. The message, contained in the template, will appear in the “Message” box. Skip this step if you plan to create a completely custom message.

   **Note** In the body of the message, you may find placeholders such as `[[Custom_Field]]` and `[[Item_Field]]`, followed by field identifiers. When an email notification is created, each of those placeholders will get replaced by a value contained in a field this placeholder is related to. For instance, the `[[Item_Field_Name]]` placeholder will get replaced by the content of the **Name** field of the item, the `[[Custom_Field_Text_Field]]` will be replaced by the content of the **Text Field**, etc.

8. To append the template-provided content with a custom content, in the “Add Additional Note” box, enter the required message. Use entries of the **Insert Field** list to add contents of specific item’s fields to the appended content.

   **Note** When selected, those entries will appear as placeholders (see the previous note). The placeholders will be replaced by the actual field values at the moment when the reminder will be triggered.

Apply provided text formatting tools when necessary.
9. To preview the message body you’ve created, click the **Preview** button. Note, that field placeholders have been replaced by actual values, contained in those fields. To continue editing the reminder, click the **Edit** button.

10. To save the reminder and close the “Set Reminder” window, click the **Save** button.

**Resending reminders**

Sometimes you need to send a particular reminder to all its recipients right away without waiting for the next scheduled event. Or you need to resend a reminder after modifying the content or adding extra recipients.

**To resend a reminder**

1. Click the **Reminder** button.
2. Click on the context menu of the required reminder;
3. On the menu, select **Edit**;
4. Make changes to the reminder (optional)
5. In the “Set Reminder” window, click the **Resend** button. The message will be sent shortly to all persons listed in the **Recipients** textbox.

**Deleting reminders**

**To delete an item reminder**

1. Click the **Reminder** button.
2. Click on the context menu of the required reminder;
3. On the menu, select **Delete**;
4. Click **Delete** again for confirmation.