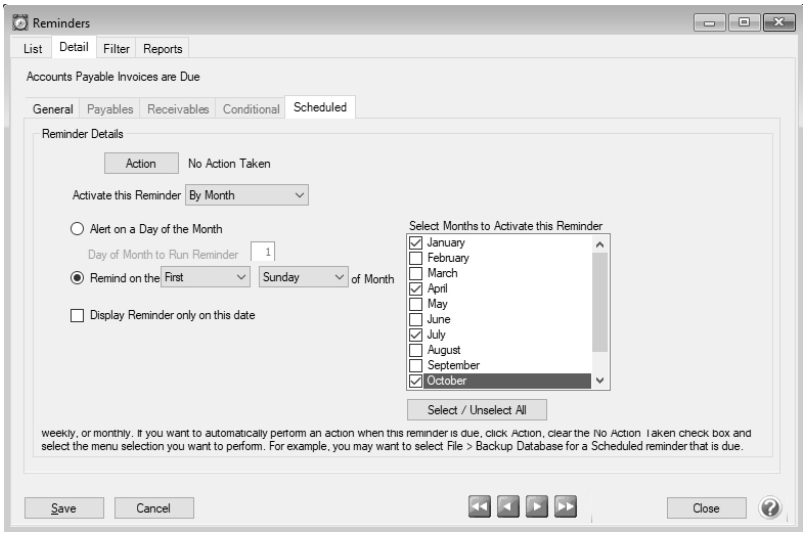
Scheduled Reminders

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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batch of automatic withdrawal transactions, you would set that reminder up as a scheduled reminder on the date they are withdrawn.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.



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**, **By Day**, **Weekly**, or **By Month**..
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 on, Display Reminder only on this date, etc.
9. If By Day or By Month 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.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.