Conditional Balance Reminders

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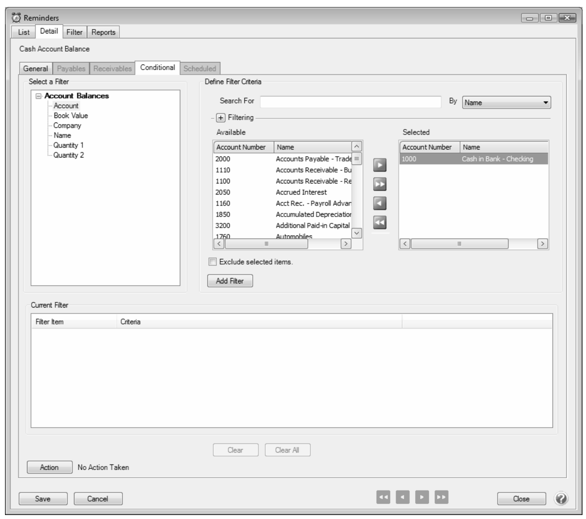
The Conditional Balance Reminder applies a filter to a specific condition that can then display a reminder only when the condition is met. For example, if you want to be reminded when a customer's balance is greater than a set dollar amount, or if you want to be reminded that you owe a specific vendor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



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.