

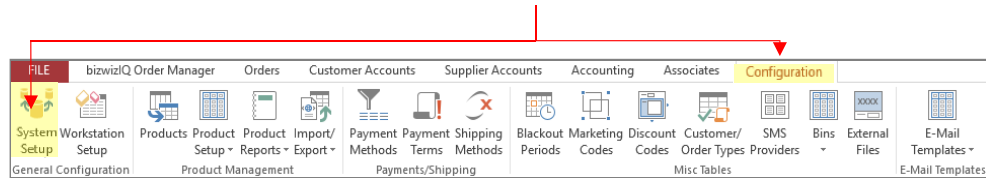
Re-Order Reminders and/or Calendar events

Using Re-Order Reminders and Calendar events are a great way to be proactive with your customers and to keep your team members on the same page.

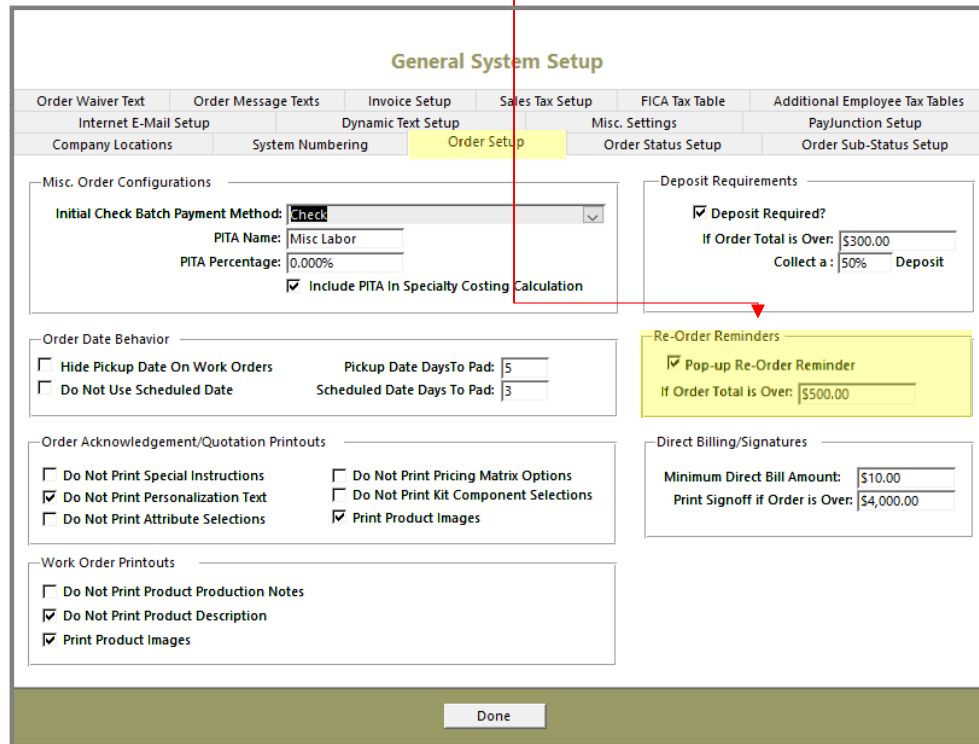
The following are some graphics on how to use your reminders and calendars in Order Manager:

1. General System Setup:

- a. First, let's set an automatic reminder to remind you to remind your customers (That is a lot of reminding, but it is automated!).
- b. Click on the Configuration Tab | System Setup.



- c. Then click on the Order Setup tab to bring up the following window:



- d. On the order setup tab, go to the Re-Order Reminder section. Here you can select to have a pop-up window appear each time you have an order over a specified amount to create an automatic Re-Order Reminder e-mail.
- e. On the above example, it shows \$500.00, but you can set that threshold to anything you want. For example, if you want the reminder popup to show for any order over \$200, then set the If Order Total Is Over field to \$200.
- f. Below is an example of the pop-up window that is displayed when an order is over the amount you set in the If Order Total Is Over field in the System Setup we discussed earlier.

- g. In the Re-Order Reminders window, you have two options to select; you can use one or both options.
- h. Place Re-Order Reminder on My Calendar: When selected, a date field will be visible. This date represents the date you want to have a calendar reminder prompt you to do a call on this order. A good habit to be in if you want to set a calendar event to call on a customer is to set an automatic Re-Order Reminder to go out a few days prior. This will get your customer thinking about their upcoming event and the awards that are going to be needed.
- i. Send automatic Re-Order Reminder e-mail: You can select this option by itself if you simply want to send an automated e-mail on the date you select to remind them of a possible upcoming need for awards.
 - 1. On the date selected, an email is composed and put in the Outgoing Queued E-mails. Link is located in bottom right of all main screens.

| Orders To be Completed By | | | | | | | |
|---------------------------|----|----|----|----|---|---|------|
| W | TH | F | SA | SU | M | T | |
| 6 | 24 | 14 | 15 | 0 | 0 | 0 | 1 24 |

| Estimated Pick-Ups | | | | | | | |
|--------------------|----|----|----|----|---|---|------|
| W | TH | F | SA | SU | M | T | |
| 5243 | 13 | 12 | 24 | 0 | 1 | 1 | 4 38 |

- Invoices to Print: 3
- Past Due Notices to Send: 163
- Orders Left over 30 days: 5189
- Orders To Be Shipped Today: 19
- Outgoing Queued E-mails: 34
- Quotes to Followup On: 51

2. Calendar Event:

- a. You can also set a calendar event directly for an order from the Maintain Order screen.

Maintain Order

Order Number: 60312
Order Status: Open
Order Sub-Status: <---- Order Sub-Status

Initialize From Order: [Dropdown]
Company Name: [Text]
Primary Contact Name: David Ay E-Mail: DavidA@up.com
Secondary Contact Name: [Text] E-Mail: [Text]
Billing Address: 100 rood Drive Customers Local Time: 1:04 PM
Phone #: [Text] Ext: 228 Tennessee
Fax #: [Text] Cell #: [Text] Do Not Send SMS Notices
Order Description: acrylic awards (sr)

Sales Representative: Niels Norby
Location: Carlsbad
Order Type: Retail
Pickup/Ship By: 4/20/2018 3:30 PM
Scheduled: 4/11/2018 3:30 PM
Event Date: 5/4/2018
Marketing Code: Repeat Customer
Stock Location: V - SHELF
Pickup Location: [Text]

| Product Image | Qty | Stock # | Item Name | Unit Price | Misc Labor | Extended Price | Tax | Bck |
|---------------|-----|-----------|---|------------|------------|----------------|-----|-----|
| | 32 | R2403A | New World Acrylic Award see external | \$87.20 | \$0.00 | \$2,790.40 | | |
| | 5 | R10MAQ-BG | Marquis Acrylic Award various colors | \$82.80 | \$0.00 | \$414.00 | | |
| | 7 | R24123B | Slant Face Tower Acrylic Award various color bottoms | \$87.30 | \$0.00 | \$611.10 | | |

Additional Order Options/Actions

- Direct Billing
- Payment Details
- Shipping Details
- Calendar Event
- P.O./Sales Tax
- Misc. Charges
- Re-Order Reminders
- Custom P.O.'s
- Order Documents
- Outgoing Internet E-Mails
- Send Internal E-Mail
- Order Comments
- Duplicate Order
- Order Statistics
- Scan Document
- Reset Deposit Rule
- Create Customer

Order Sub-Total: \$4,141.50
Discount: \$0.00
Shipping/Handling: \$65.00
Sales Tax (EXEMPT): \$0.00
Less Total Payments: (\$4,206.50)
Balance Due on Order: \$0.00
Balance Due on Invoice: \$0.00

Cancel Order Trigger Event Change to Quote Print Forms Done

- b. When you go this route, it will pop up the following window:

Add Calendar Event

Event Details Additional Attendees Reccurrence

Event Owner: [dropdown] by

Event Name: [dropdown] Private Event

Event Details: [text area]

Location: [text area]

Event Type: [dropdown: To-Do Task] Start Date: [dropdown: 4 /11/2018] Start Time: [dropdown: 8:00 AM] Duration: [dropdown: 30 Minutes] Priority: [dropdown: Low]

End Date: [dropdown: 4 /11/2018] Start Time: [dropdown: 8:30 AM]

Notifications

First Notification: [dropdown: No Notification]

Second Notification: [dropdown: No Notification]

Third Notification: [dropdown: No Notification]

Open Order Associated with this Event

Back Delete Event Done

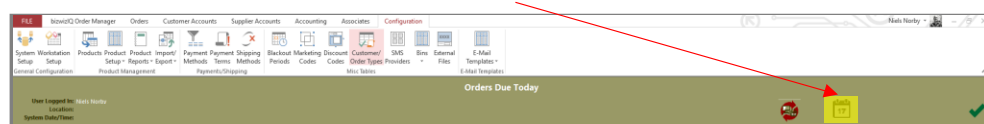
- c. In the Add Calendar event, you can select a date you want a reminder to pop up to remind you to do something with this order. For example, you can use it if you need to remind yourself to call, order product, or review this important order to make sure things are moving along. You can also assign it to additional people. For example: your ordering, finance, or art department. When assigning additional people, it will also pop up on the work station they are logged into.

3. Internal Calendar:

- a. You can also use the internal calendar to remind you of events that may not pertain to an order. For example: you may need to be reminded of an appointment for a meeting.
- b. To access the internal calendar, click on the Associates tab in the menu ribbon bar, then click on internal calendar to bring up the calendar.

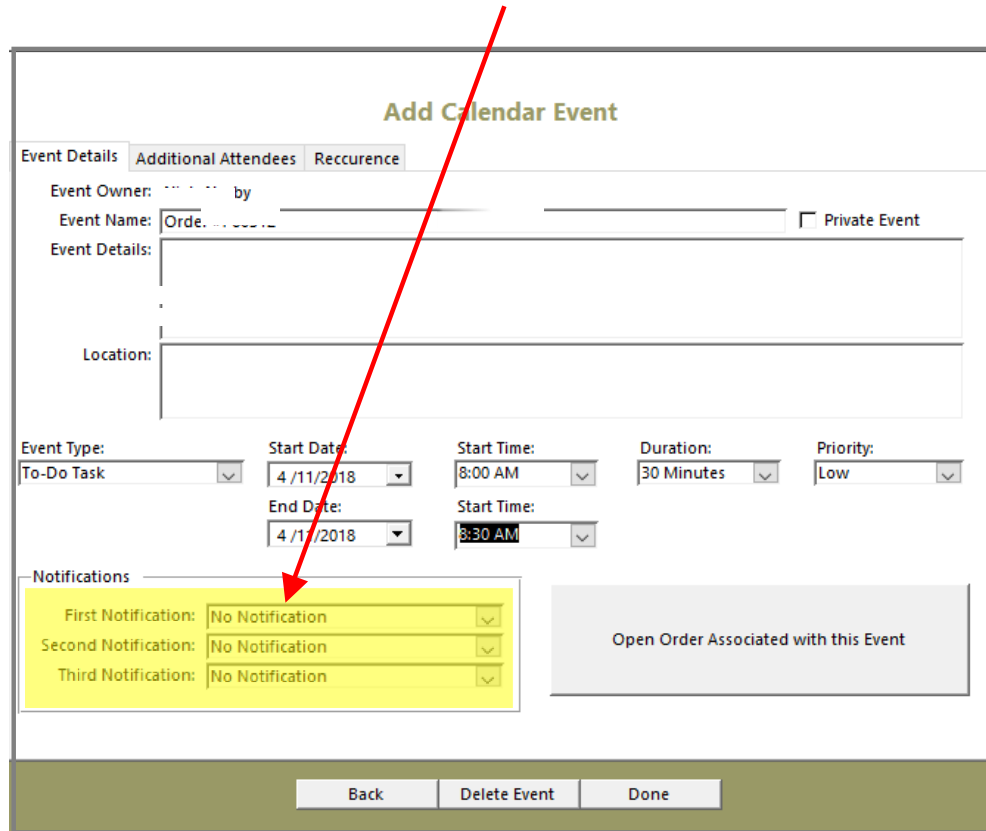
4. Reminder of Calendar Event

- a. When you do have a calendar event Order Manager will display a calendar reminder icon at the top of as shown below.



When you see the calendar icon, simply double click on the icon to bring up your calendar.

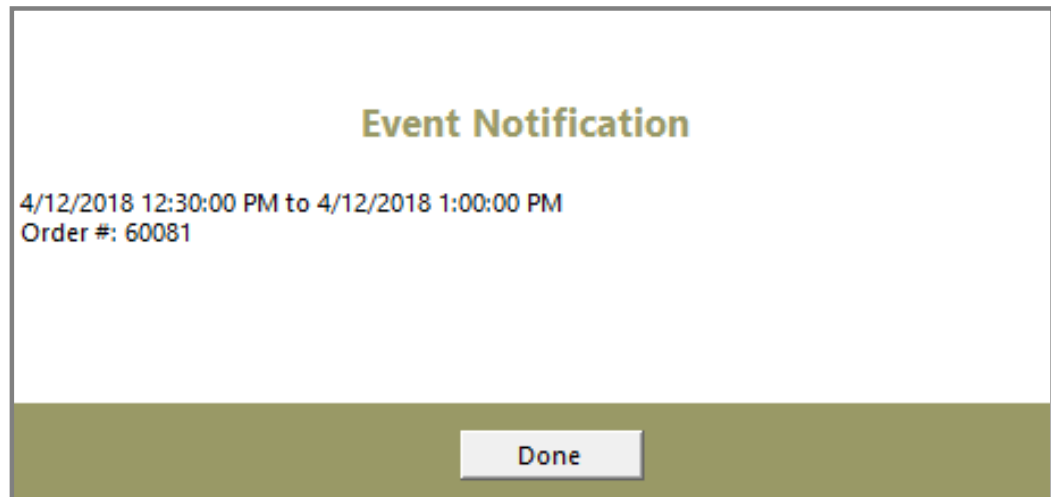
- b. In the Add Calendar Event window you can also create Notifications that will cause a pop-up window to appear at the time of notification you set. You can set up to three notifications.



The screenshot shows the 'Add Calendar Event' form with the following fields and options:

- Event Details:** Event Owner (dropdown), Event Name (text input), Event Details (text area), Location (text input).
- Event Type:** To-Do Task (dropdown)
- Start Date:** 4/11/2018 (dropdown)
- End Date:** 4/11/2018 (dropdown)
- Start Time:** 8:00 AM (dropdown)
- Start Time:** 8:30 AM (dropdown)
- Duration:** 30 Minutes (dropdown)
- Priority:** Low (dropdown)
- Notifications:** Three dropdown menus, each set to 'No Notification'. A red arrow points to the first dropdown.
- Buttons:** Back, Delete Event, Done.
- Text:** Open Order Associated with this Event

- c. Here is an example of the Event Notification pop-up window that happens when the time you set for a Notification.



The screenshot shows the 'Event Notification' pop-up window with the following content:

- Title:** Event Notification
- Text:** 4/12/2018 12:30:00 PM to 4/12/2018 1:00:00 PM
Order #: 60081
- Button:** Done

There are many uses of Re-Order Reminders or Calendar Events that can put your team on the same page and never forget an event or reminder. It is a powerful feature that can help cut down on mistakes!

Contact our tech support department if you have additional questions about Calendars or Re-Order Reminders.