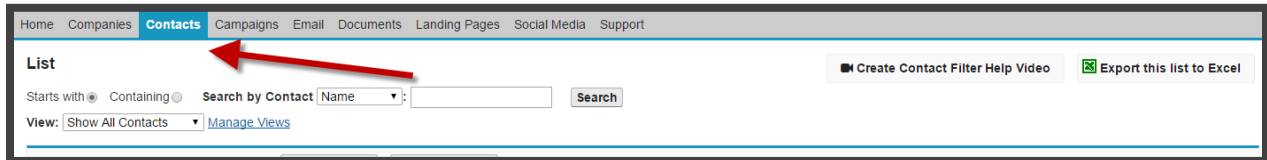
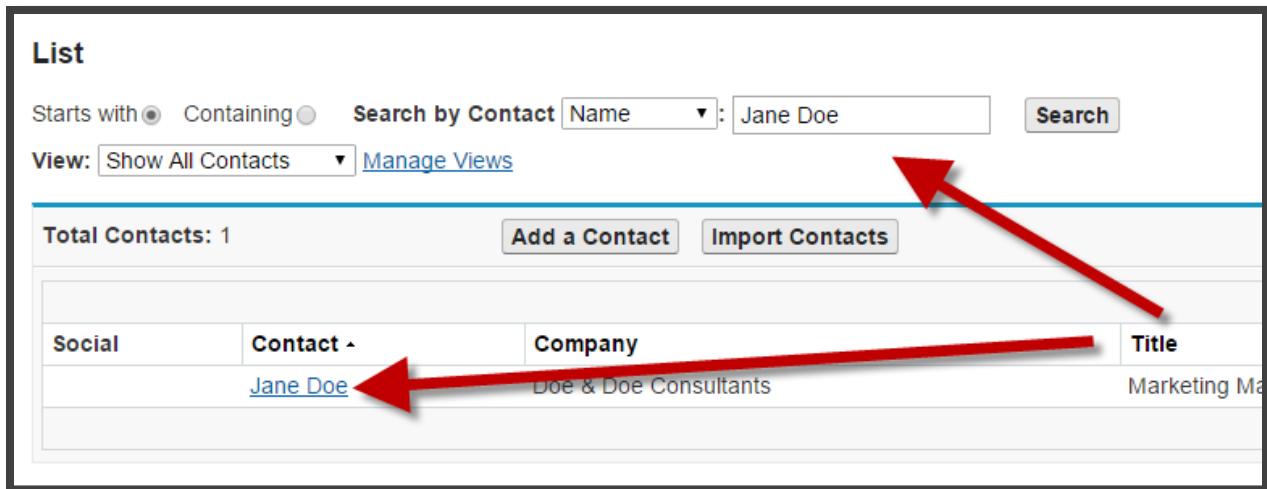


How To Set Reminders/Follow-Ups

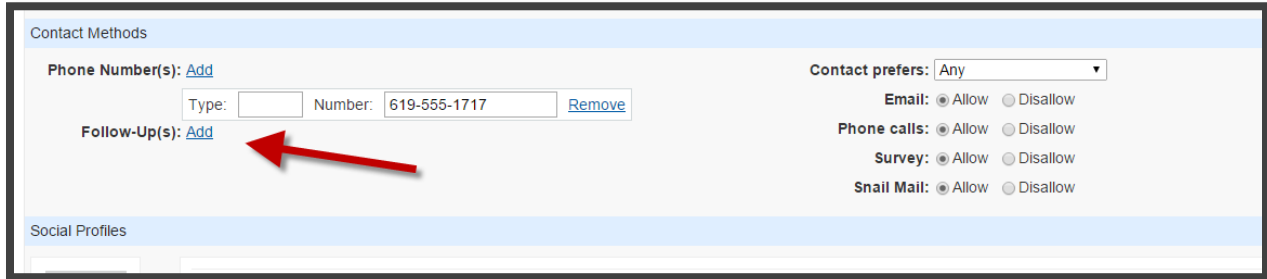
1) Select Contacts from the menu bar.



2) Search for the contact you would like to set a Follow-up for. Then click the contact's name.



3) Under Contact Methods, go to Follow-Up(s) and Add a new Follow-up.



Contact Methods

Phone Number(s): [Add](#)

Type: Number: 619-555-1717 [Remove](#)

Follow-Up(s): [Add](#)

Contact prefers: Any

Email: Allow Disallow

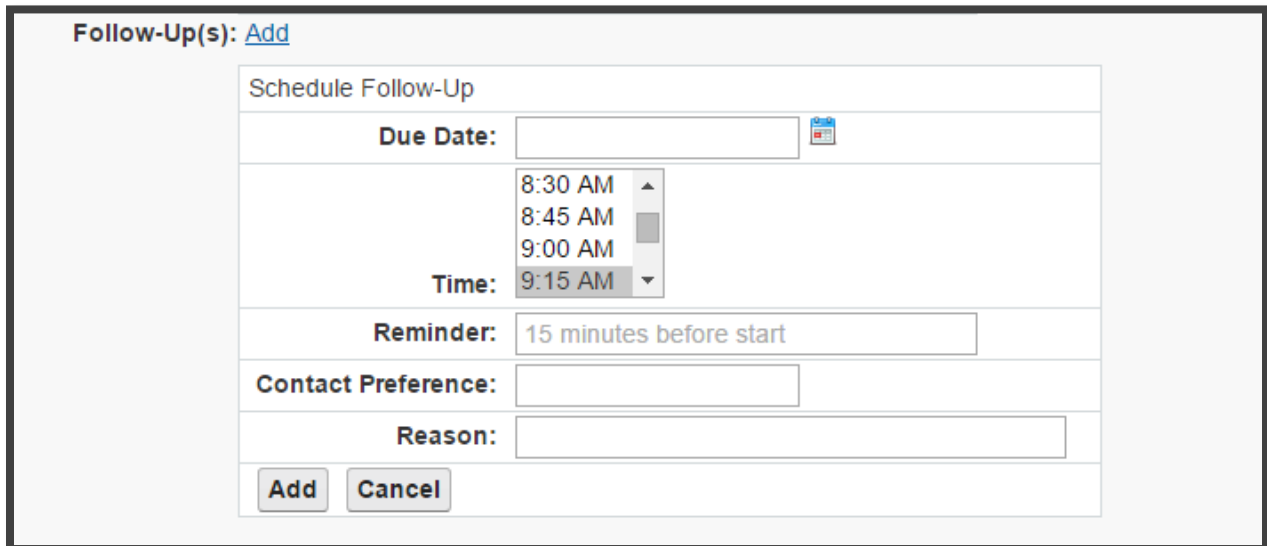
Phone calls: Allow Disallow

Survey: Allow Disallow

Snail Mail: Allow Disallow


Social Profiles

4) Enter the date, time, reminder, contact preference and reason for the Follow-up, and then click Add.



Follow-Up(s): [Add](#)

Schedule Follow-Up

Due Date: 

Time:

Reminder:

Contact Preference:

Reason:

- 5) Review the Follow-up once it is added, and remove if necessary. Then click Save Contact at the top of the page.

Follow-Up(s): [Add](#) P

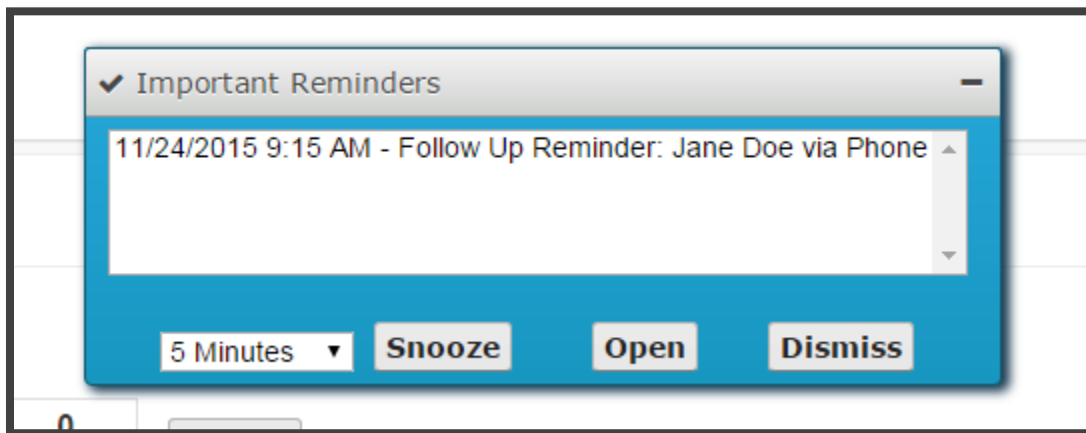
Due: 11/24/2015 9:15 AM Jane Doe via Phone [Remove](#)

Update [Help Video](#)

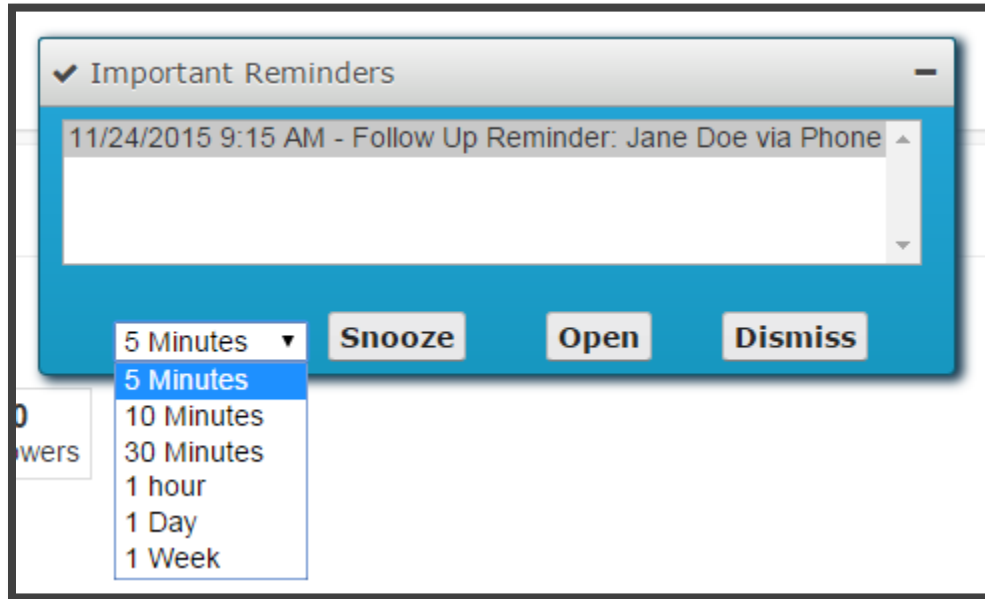
[Save Contact](#) [Save and New](#) [Cancel](#) [Send an Email](#)

Contact Information * = Required Field

- 6) A window will populate depending on the scheduled Follow-up time.



- 7) Select a reminder. Choose the Snooze option to populate the reminder for a later time, Open the contact for review, or Dismiss the reminder so that it will not continue to populate.



- 8) To minimize the Reminder window, click the minimize icon in the top-right corner. This will minimize the window to the bottom right-hand corner of your screen. View the list of reminders by clicking on the Plus (+) sign.

