Print Reminders for a Day/Date Range

1. Click the **Reports** ribbon tab from the top of your screen.
2. Click the **Contacts** button and choose **Total Reminders**.
3. Set a date range for your report.
4. **[Optional]** Click into the checkbox next to **Specific User** if you would like to generate a report for a specific user; otherwise, reminders for all users will be displayed.
5. Optionally include **Linked Event Information** and **Inactive Reminders**.
6. Choose to view in **Details** or **Summary** format by clicking the appropriate radio button.
7. **[Optional]** Choose to group the reminders by a particular detail.
8. Click **OK** to generate the report.

See *Printing Reminder Lists*

Print Contact History Notes for One Account

1. Click the **Contact Manager** button from the **Main** sidebar.
2. Search for and select the desired account.
3. Click the bottom portion of the **Prints** button at the top of the screen.
4. Click **Contact Manager** and choose **Contact History**.
5. From the Print Preview which displays, click the **Print** button.

See *Printing Contact History Notes*

Print Contact History Notes for a Day/Date Range

1. Click the **Reports** ribbon tab from the top of your screen.
2. Click the **Contacts** button and choose **Total Contacts Made**.
3. Set a date range for your report.
4. **[Optional]** Click the checkbox next to **Specific User** if you would like to generate a report for a specific user; otherwise, contact history notes for all users will be displayed.
5. Optionally include **Linked Event Information**.
6. Choose to view in **Details** or **Summary** format by clicking the appropriate radio button.
7. **[Optional]** Choose to group the reminders by a particular detail.
8. Click **OK** to generate the report.

See *Printing Contact History Notes*

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**Additional Resources**

- Using the Contact Manager Grid
- Viewing and Editing Automatic Reminders
- Deleting Your Inactive Reminders
- Inserting Merge Fields into an Automatic Reminder Message
- Retrieving Linked Reminders into a Manager

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**Contact**

Horizon Business Services, Inc.
Naples, FL 34102
T: 239.261.6617
F: 239.261.0067
www.caterease.com
help@caterease.com
Create a New Reminder in Event Manager

1. Click the Event Manager button from the Main sidebar.
2. Search for and select the event for which you would like to create a reminder.
3. Click the New Reminder button , located in the toolbar on the right-hand side of your screen (or from your Tools menu).
4. Complete the reminder detail fields by typing directly into the fields or by clicking the down arrow to the right of each field and choosing an option.
5. Type what you would like to be reminded of into the Message text block.
6. Click OK.

See Creating a New Reminder from Event Manager

Resend E-mails from Contact Manager

1. Click the Contact Manager button from the Main sidebar.
2. Search for and select a Client/Organization.
3. Click the Emails Sent tab, located towards the middle of your screen.
4. Click on the e-mail you would like to resend.
5. Click the Resend Email button , located on the right-hand side of the window.
6. Click OK at the informational prompt.
7. Reattach any prints or files to the e-mail.
8. Click Send.

See Re-Sending Emails from Contact Manager

Create Automatic Reminders

1. From an event in Event Manager, click the Administration ribbon tab at the top of your screen.
2. Click Options > Automatic Reminders Setup.
3. Click the Add New Auto-Reminder button , located at the top right-hand side of the Automatic Reminders window.
4. Click the down arrow at the right of the first field on this screen and choose an action to trigger the creation of the reminder.
5. Click the days, weeks, or months drop-down list and select a date to link the auto-reminder to.
6. Click the down arrow to indicate whether the number of days you selected is to occur before or after the reminder date and time.
7. Click the down arrow to indicate whether the reminder pertains to Event Date, Booked Date, or Revised Date.
8. Fill out any desired informational fields.
9. Type the reminder message into the Message text block.
10. Click OK.

See Viewing Active Reminders

Print Reminders for One Account

1. Click the Contact Manager button from the Main sidebar.
2. Search for and select the desired account.
3. Click the bottom portion of the Prints button, located at the top of the screen.
4. Click Contact Manager > Reminders.
5. From the Print Preview which displays, click the Print button.