

## Automatic Reminders

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## Automatic Reminders

### Feature Summary

You can define automatic actions to create reminders when item costs are updated. This allows you to track changes to item costs and who made the change.

#### Define Automatic Actions

- Enter an UPD PURCH action for automatic reminders when Purchase Costs are updated
- Enter an UPD BUD action for automatic reminders when Budget Costs are updated
- Enter an UPD SELL action for automatic reminders when Selling Prices are updated

#### Define Employee Security

- Define if an employee has the authority to change or delete automatic reminders

#### View Item Reminders

- View reminders that are automatically created when costs are updated

## Automatic Reminders

### Define Automatic Actions

Actions must be setup to define if you want automatic reminders created when costs are updated.

To setup automatic actions

- Select **Reminders**
- Select the **Action Button** on the bottom of the screen
- The **Action Screen** is displayed

Enter new actions for

- UPD PURCH for purchase costs
- UPD BUD for budget costs
- UPD SELL for selling prices
- Change Automatic to Yes if you want reminders created when item costs are updated

The screenshot shows the 'Action' dialog box with the following table of actions:

	Action	Description
Select	CFA	Request Cutting for Approval
Select	CFA APPROVE	CFA Approved
Select	COM	Check to see if COM arrived
Select	COM ARRIVE	COM Arrived
Select	EMAIL C	Email Client
Select	EMAIL V	Email Vendor
Select	NOTE	Note
Select	PHONE	Phone
Select	RESERVE	Place a Reserve on Fabric
Select	SHIP TO	Advise ship to address
▶ Select	UPD BUD	Update Budget
Select	UPD PURCH	Update Purchase Cost
Select	UPD SELL	Update Selling Price

Below the table, the configuration panel for the selected 'UPD BUD' action is shown:

Action: UPD BUD  
 Description: Update Budget  
 Action Days: 0 (The number of days added to the Current Date to define the Action Date)  
 Est Days: (The number of days added to the Action Date to define the Estimated Completion Date)  
 Priority: 1 (1 Green, 2 Yellow, 3 Red)  
 Automatic: Yes (Is an action automatically created for this type of action)  
 Email Client: No (Is the email automatically set to the client for this type of action)  
 Email Vendor: No (Is the email automatically set to the vendor for this type of action)  
 Responsible: (The default employee for this type of action)

# STUDIO DESIGNER

## Automatic Reminders

### Define Employee Security

You can restrict employees from changing or deleting automatic item reminders.

To define employee security

- Select **Files**
- Select **Employee**
- The **Employee Screen** is displayed
- Select **Show Security**
- Enter No in **Delete Auto Rem** to restrict employees from changing automatic reminders

Employee	Name	Phone	Email	Connections ID	Active
Select LANCE	Lance Haeberle		Lance@StudioTinc.com	2	Yes
* Select					

  

Employee: LANCE	Password: LANCE	Office Checks: Yes
Name: Lance Haeberle	Report Security: 99	PO Checks: Yes
Address:	Employees: Yes	Enter Checks: Yes
City, State, Zip:	Print Orders: Yes	PO Vouchers: Yes
Phone: Fax:	Void Orders: Yes	Enter Receipts: Yes
E-Mail: Lance@StudioTinc.com	Print Invoices: Yes	View Receipts: Yes
Title:	Void Invoices: Yes	Print Address: Yes
Active: Yes	Add Address: Yes	Delete Auto Rem: Yes
Start Date:	Delete Address: Yes	Show Costs: Yes
Termination:	Add Inventory: Yes	View Costs: Yes
Social Security:	Rate: 0	View Profit: Yes
Connections ID: 2	Commission %: 0	Cost Rates: Yes
Contact:		General Ledger: Yes
Phone:		
Group:		
Activity:		
Department: 01		

# STUDIO DESIGNER

## Project Scheduling

### View Item Reminders

Item reminders are automatically created when costs are changed if you have automatic actions defined.

Item reminders are only created if the item is on an order.

To view the item reminders

- Open a design item
- Change a Purchase Cost or Selling Price
- Select **Reminders**
- The automatic reminders are in the reminders list

The screenshot shows the Microsoft Access - [Design Item] window. The top section contains fields for Client (DOUGLAS), Project, Room (001), Item (001), Component (A), Vendor (MAX), Ship To (CANYON), Sales Code (FURN), Designer, Inventory, Catalog, Code 1, Code 2, and Finish (FINISHA). The middle section contains fields for Proposal # (0001), P.O. # (23), Invoice # (1), Ship Via (Best Way), Terms (50% Deposit), FOB, Date Req, Attention, Sidemark (Venetian Console v), Department (01), Specifier (No), CFA, and Expediting. The right section contains an Entry field with the text "Venetian Console with Marble Top". Below these fields are buttons for Add, Delete, and Close. The bottom section contains tabs for Costs, Reminders, Payments, and Specification. The Reminders tab is active, showing a table with columns: Priority, Action, Date, Action Date, Days, Completed, Description, Employee, Email, and Emailed. The table contains one row with the following data: Priority (green square), Action (UPD PURCH), Date (6/25/2007), Action Date (6/25/2007), Days (10), Completed (6/25/2007), Description (PurchaseUnitCost From \$3,470.00 To \$4,000.00), Employee (LANCE), Email (MAX), and Emailed (checkbox). There are also buttons for Hide Costs, Image, Duplicate, Sales Tax, and 100% Deposit. The bottom status bar shows "Form View" and "FLTR".

Priority	Action	Date	Action Date	Days	Completed	Description	Employee	Email	Emailed
■	UPD PURCH	6/25/2007	6/25/2007	10	6/25/2007	PurchaseUnitCost From \$3,470.00 To \$4,000.00	LANCE	MAX	<input type="checkbox"/>