STUDIO DESIGNER

Automatic Reminders

June 25, 2007

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

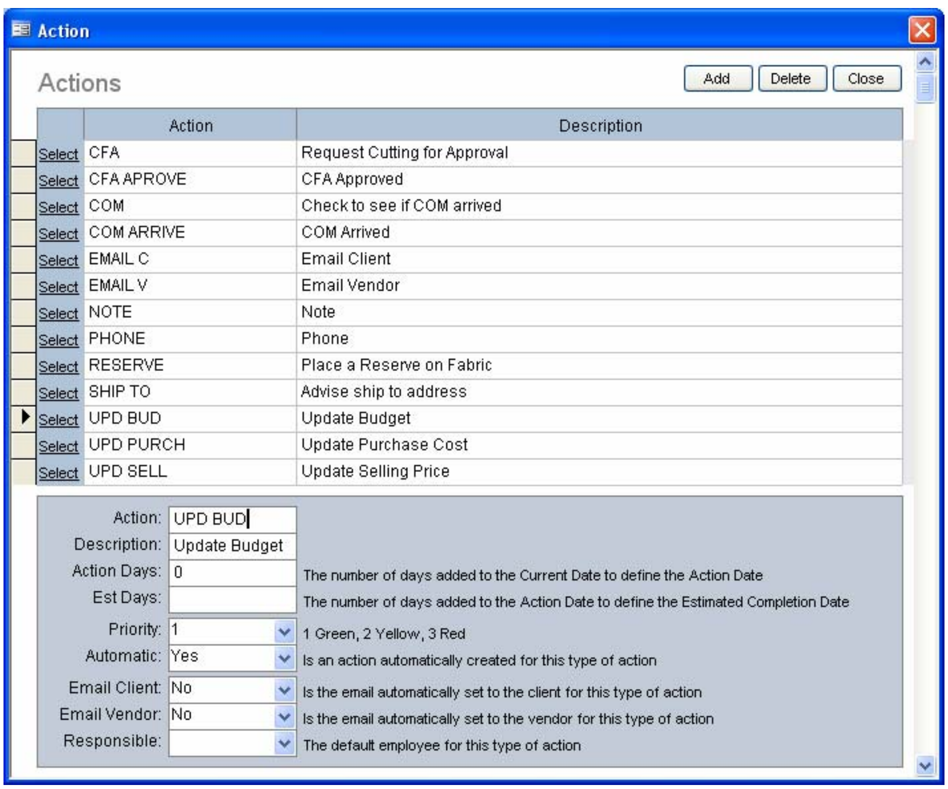
Actions must be setup to define if you want automatic reminders created when costs are updated.

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



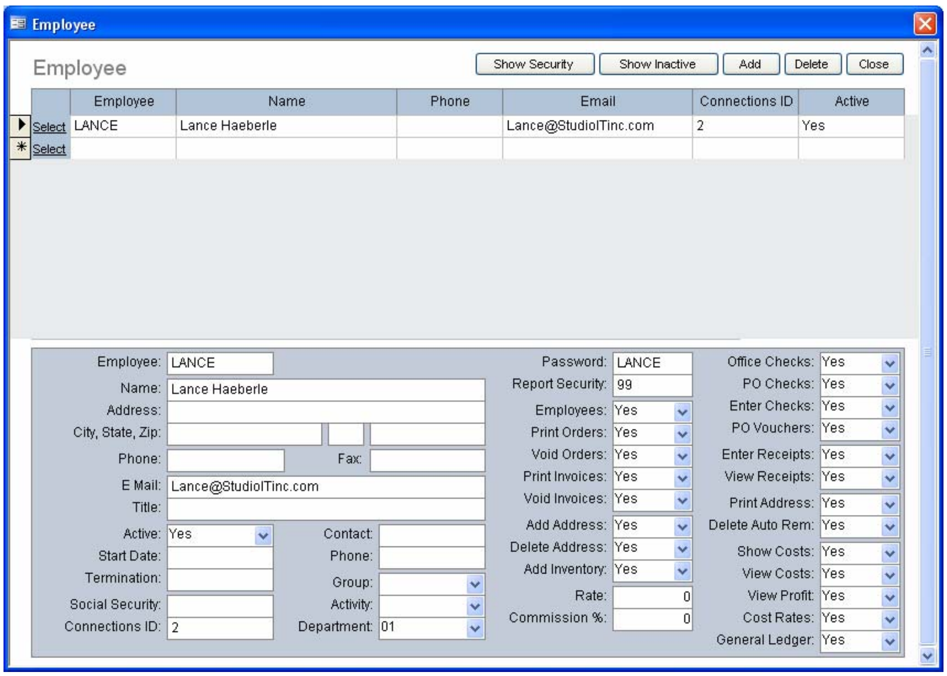
Automatic Reminders

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



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