Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

Reminders

Memos have been split into 3 types. Alarms, Memos, and Reminders. Most users will already be familiar with Memos and Alarms but Reminders are a new feature for Release 3.00.

You can setup Reminders that will pop up in Accredo at a specified time and only show up for the Target User Code. So if you have set up a Reminder with your User Code as the Target User, the reminder will only pop up for you.

Reminders can be useful for such things like reminding you of a scheduled meeting you are due to attend, a phone call you need to make, or even for just reminding you to feed the neighbours cat. Reminders have a Reminder Interval to remind you a specified time before the event; and when you log in, Accredo will check for any reminders due to for you.

Set up your defaults

First Specify the Reminder Interval

Navigator > Setup > Company > Users > User Preferences

This is how long prior to the event you wish to be reminded. The default is 15 minutes.

Memo Defaults

Each module and (including Company) has it's own memo defaults. E.g. for AR

Setup > Accounts Receivable > Settings > Memos Tab

Here you can select the default type of Memo for each Account File in the module, and which Account File is the default when you enter a Memo in the module.

Set Up Memo Categories

Categories may be named under Setup > Company > Configuration > Settings > Categories tab. Categories are shared for all Memos.

To add Memo Categories. Go to

Maintain > Company > Memo Categories 1 and Memo Categories 2.

In the Accredo Demonstration Company, we have named Memo Category 1 'Action Type' and have setup different 'Action Type' codes i.e., Email, Meeting, Personal etc.

Memo Categories can be selected when you are adding or editing a Memo, and can be displayed in memo grids and reports. →

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Adding a Reminder

Below is an example of how to add a Reminder for a Customer.

Tasks > Accounts Receivable > Enter Memos

Account – Select AR Customers

Type – Select Reminder

Customer– Select the Customer e.g. ASHENG

Subject – e.g. Meeting with Ash Engineering

Date – This will default to the machine date and time but you can key in any time. We also have ½ hour slots available to select to make it easier. In this example, I have selected the next ½ hour slot.

Reminder – will default from your reminder interval but you can change this.

Save then Close the form and carry on with what you were doing.

At the action on time, or if this has already passed, at the next time Accredo checks for reminders (which is specified under Setup > Company >Configuration > Settings > Memos Tab) →

The Reminder will screen will pop up, showing all reminders for your user code that are due now.
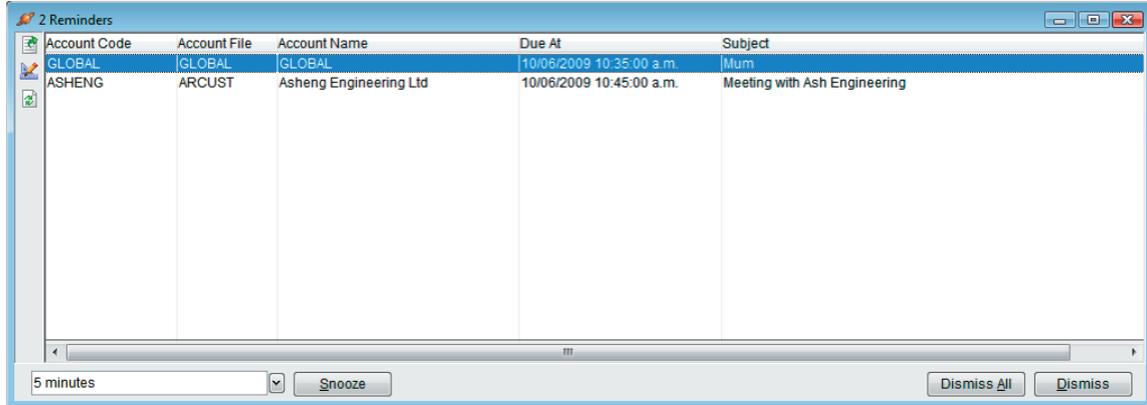
You can select each one, and click 'Dismiss' to inactivate the reminder or you can click 'Dismiss All' to Inactivate All.

Or you can click Snooze and it will remind you again at the specified snooze time, just like an alarm clock.

Viewing Memos

You can view your list of memos by clicking the memos button anywhere you select a code, and in two new places for each module. On the memo tab of Masterfile maintenance forms. E.g. to view memos for a Customer go to

Maintain > AR > Customers > [Select Customer] > Memos tab

Or you can view all memos for the module by clicking on the Memo List Folder. I.e. to view all memos for AR to go

Maintain > AR > Memo List ■