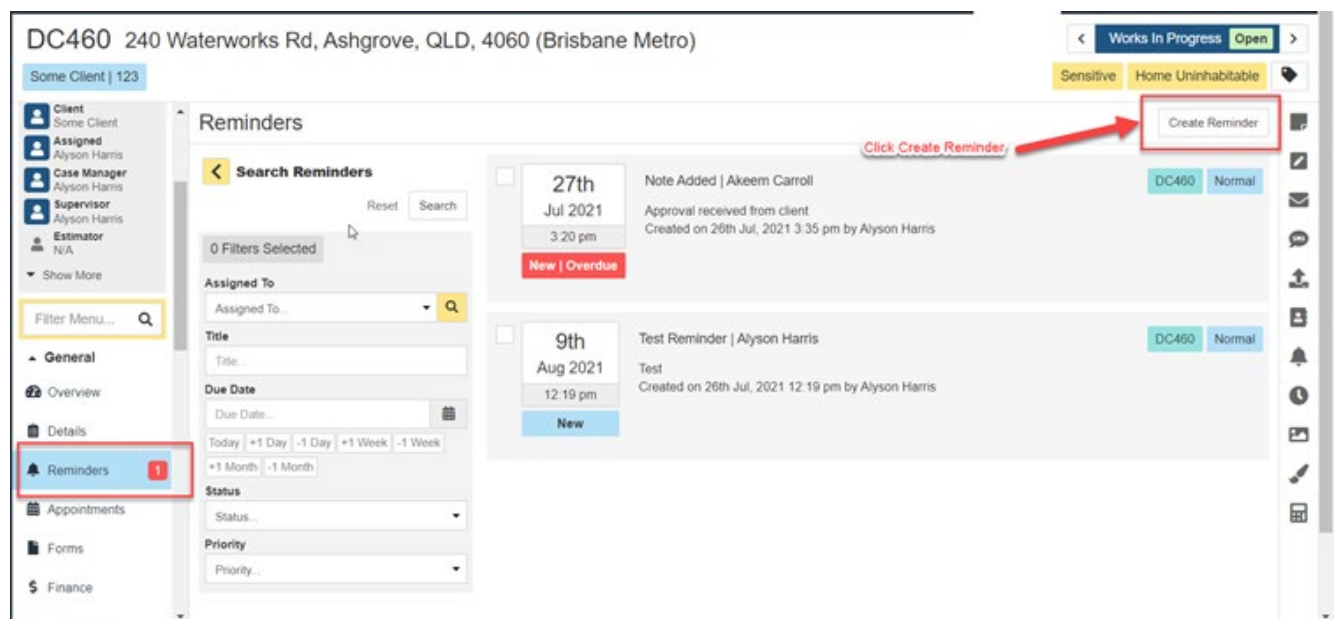


Updated 27.10.22

Prime Support Centre - Jobs

Prime Instructions | Jobs - How to Create Reminders

1. Go to the Reminders page on the job. Click Create Reminder in the top right hand corner.



2. Select a template from the drop down list (these can be set up through Administration). This will prefill the Title and Description boxes. These can be edited as required.

You do not have to use a template from the drop down. Simply type your desired Title (required) and Description in the boxes.

3. Select who you want the Reminder to be Assigned to (internal staff). This will go onto their Checklist for them to then action.
4. Select the Due Date and Time. If the Reminder is not completed prior to this time it will show as Overdue.

Some Client | 123

Summary

Customer
Scott Harris

Preferred Number
0400111222

Email
No Email

Site
240 Waterworks Rd,
Ashgrove, QLD,
4060

Client
Some Client

Assigned
Alyson Harris

Case Manager
Alyson Harris

Supervisor
Alyson Harris

Estimator
N/A

Show More

Filter Menu...

General

Overview

Details

Reminders 1

Appointments

Forms

Finance

Reminders

Go Back

Reminder

Select a reminder

Call Back Customer

Template Selected

Title *

Call Back Customer

Description

Respond to customer query

Details prefilled per template

Assign To *

Alyson Harris

Who the Reminder is for

Priority *

Normal

Due Date *

30 Jul, 2021

Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

When the Reminder needs to be actioned by.

Due Time *

03:36 PM

Now +15 Min -15 Min +1 Hour -1 Hour Nearest Hour

Cancel Save

There are unsaved changes

Some Client | 123 | 1 Linked Job

Works in Progress Open Sensitive Home Unavailable

Summary

Customer
Scott Harris

Preferred Number
0400111222

Email
No Email

Site
240 Waterworks Rd,
Ashgrove, QLD,
4060

Client
Some Client

Assigned
Alyson Harris

Case Manager
Alyson Harris

Supervisor
Alyson Harris

Estimator
N/A

Show More

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Appointments 1

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Finance

Documents

Reminders

Search Reminders

0 Filters Selected

Assigned To

Assigned To

Title

Title

Due Date

Due Date

Today +1 Day -1 Day +1 Week -1 Week +1 Month -1 Month

+1 Month -1 Month

Status

Status

Priority

Priority

30th Jul 2021 3:36 pm	Call Back Customer Alyson Harris Respond to customer query Created on 28th Jul, 2021 3:42 pm by Alyson Harris	DC460 Normal
9th Aug 2021 12:19 pm	Test Reminder Alyson Harris Test Created on 26th Jul, 2021 12:19 pm by Alyson Harris	DC460 Normal
29th Jul 2021 3:29 pm	Note Added Aknem Carroll Completed 28th Jul, 2021 3:44 pm Approval received from client Created on 26th Jul, 2021 3:35 pm by Alyson Harris	DC460 Normal

List of all Reminders on job.

Prime Instructions | Jobs – How To Complete Reminders

The Reminder can be completed by ticking the check box. The Reminder will turn green and the status will now show as Completed.

*Note - The Assigned on the Reminder will be able to see these on their Checklist and can also complete them from there without having to come into the job. Or they can click the Reminder from the Checklist and it will bring them to the job where they can complete the required action, and then complete the Reminder.

Once the Reminder is completed it will no longer appear on the user's Checklist.

