Reminders

The CM allows you to add reminders associated with an account or contact as reminders for yourself to complete tasks, appointments, phone calls, emails, etc. You can search through existing reminders using the title, a date range, an account or contact it is associated with, and so on.

Begin by clicking Contact Management in the user menu on the left side of PinPoint, then click Reminders.

Add Reminder

1. Click the Add Reminder button.
2. Enter a Title for the reminder.
3. Select the Account you want the reminder assigned to.
4. Fill in any other information needed for the reminder, then click Save.

Add Notes

1. Under the Action column, click the Notes button next to the reminder.
2. Enter your message, then click Save.