

How do I make a phone reminder list?

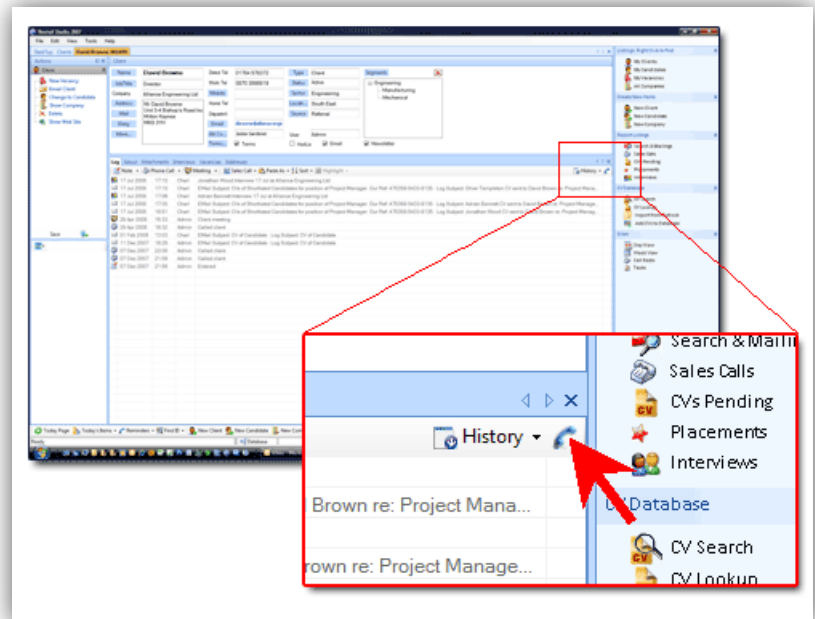
There are various ways to remind yourself to call people. The phone reminders list is one way, although it is a far simpler – and less formal – way than using Call Backs.

A phone reminder list is very quick to build and is not time-specific, unlike Call Backs. There is also no direct link to the record's log so you need to remember to open the record at the end of the call and record it, should you wish to.

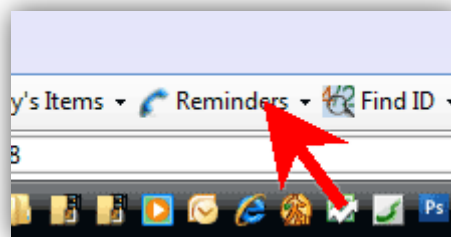
1. Look up the contact you wish to add to the reminders list, and open their record.

2. On the log tab is an icon of a telephone. Click the icon and the contact will be added to the list.

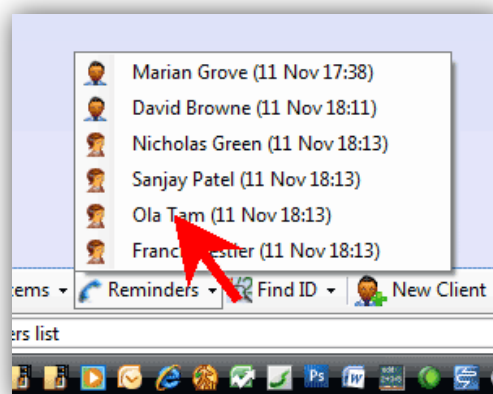
You will find the telephone icon wherever you see the log, for instance in My Clients.



3. To recall your reminders list, click 'Reminders' along the bottom toolbar.



4. A list will be shown with the date and time that you created the reminder. Click on a contact to open their record and take the contact off the list.



See also:

➤ *How do I create call backs?*