

Managing automatic task reminders

You can set up, at the customer level, automatic task reminders.

Requirements: You must have a customer role at the customer level that includes the Modify Customer user right.

For Approvers and Reviewers, up to three reminders are provided, each with a different subject, message and sending date relative to the due date of the task.

The date options for sending task reminders are:

- **None**
- **Three Days Before Due Date**
- **One Day Before Due Date**
- **On Due Date**
- **After Due Date**
 - The last option, **After Due Date**, sends a daily reminder until the task is completed. The user can also define a specific hour of a day for sending the reminder. If a task is created after the reminder date, no e-mail message is sent for the reminder.

1. From the **Customer** menu, select **Manage Task Reminders**.
2. Define task reminder dates, reminder messages, and reminder time as necessary.

Tips: You can use tags to insert variables in the task reminder messages. The following tags are available to be used:

 - <projectName>
 - <taskTitle>
 - <taskDescription>
 - <taskDueDate>

Note: The time specified is based on the server time.

3. Click **Apply**.

Tip: If you do not want the automatic task reminder to be sent from a specific task, you can define it when you create a task. In the Task Options area, select the Exclude task from automatic reminders check box.

Note: Action Task is excluded from this feature. The automatic task reminders is not sent to the task user of Action Tasks.