ReRemind™

Sometimes we just need another reminder

Quick Start Guide

Version 2.0

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Introduction

Now that you have signed up for your ReRemind account, there are a few processes you will need to go through in order to set everything up for the first time. In this guide you will be taught these basic processes so that you may use the service to the fullest extent.

This guide has been organized in the order in which you will need to proceed to get everything set up for first time usage. If you need help in the future, you can refer back to this guide, or if you need additional help not covered in our knowledge base, you can contact our technical support.

We hope you find this guide useful, and the service too.

Sincerely,
The ReRemind Team

Getting Started/Setting Up Reminders

Logging In

The first process for getting started in ReRemind is logging in. When your account was created, a password and username should have been issued. You will need the username and password for this process.

Step 1
Go to http://www.reremind.com . Once the page has loaded, you will notice a button near the top right hand corner that says "Customer Login" on it. Click on this button.

Step 2
After you clicked the "Customer Login" button a page should have loaded with two boxes on it (one for Username, one for Password). Enter in your login information in these boxes, and then click the "Login" button. This will log you into the service.

If you followed these two steps you should now be successfully logged into the service. If for some reason you are not logged in, or your login information didn't work, please contact support (support-staff@reremind.com, or call them at 801-515-6800).

The Navigation Interface

After you have logged into the service, you will be at a Welcome page. You will notice that near the top of that page there is a navigation bar with a number of headings on it. You will always see this navigation bar as long as you are logged in.

The headings are:

Get Started – If you click on this heading, it will take you to the Get Started page. On this page there are basic instructions about using the service. We recommend that you read these instructions, especially on your first time through.

Recordings – If you click on this heading, it will take you to the Recordings page. The Recordings page is where all of the voice recordings are outlined and defined for your messages.

Email/Text – This heading will lead you to the Email/Text page, which is where your email messages, and text messages are defined.

Scheduling – By clicking on this heading, it will open the Scheduling page. This is where the actual scheduling of Reminder messages is done.

Reminders – If you click on this heading, it will open the Reminders page. This page shows all of the scheduled reminders, for a date of your choice.

Clients – This heading will take you to the Clients page. This is where you set up individuals and their contact information for reminders, as well as view the clients already in the system.

Groups – By clicking this heading, it will take you to the Groups page, which is where you set up groups of clients (for example, work groups, or family units) that are associated with one another.

Reports – This heading accesses the Reports page, which details information about what reminders were sent, and confirmed.

Settings – If you click on this heading, it will open the General Settings page. This page has all of the general account information for your business. If you need to change these details, this is the place to go.

Now that you are familiar with the navigation bar and its headings, we can proceed in teaching you how to do some basic set up steps.

Setting up Clients

In order to set up any reminders in ReRemind, you will have to add clients that the reminders can be sent to. To add a client, click on the Clients heading. To add a client, follow this process:

Step 1
Click on the "Add Clients" subheading. This will pull up the Add Clients page.

Step 2
You will see a number of blank fields (including First Name, Last Name, Phone Number, Email Address, and Text/SMS Number). Fill in these fields with your client's information.

Step 3
After filling in the information boxes, to add that client to your client database, click on the "Submit" button. Once you have clicked the "Submit", the client will be added.

As you can see, adding clients is a simple and straightforward process. To add more clients, just duplicate this process.

Alternately, if you already have a client list in the form of a CSV text file, you can use the "Upload a CSV File" feature on the Add Clients page. Be sure your CSV text file follows the format detailed in those instructions, otherwise it will not work. If you do not have a client list already, or you want to enter in each client separately, ignore the CSV section on the Add Clients page.

Scheduling Reminders

To set up reminders, you will need to go to the Scheduling page. By default, when this page has loaded, it will load the Appointment Scheduler page first.

You will notice that just beneath the navigation headings, you have 4 options: Appt Scheduler, Individual Reminders, Group Reminders, and Billing Reminders. The Appointment Scheduler allows you to schedule reminders easily, in the form of an appointment. As you may have already guessed, Individual Reminders are for just one client, Group Reminders are for groups of clients (***Note***: *In order for this feature to work, you will need to set up groups first. We will go into setting up groups further on in this guide*), and Billing Reminders are created to remind a group of past due individuals of bills (As with group reminders, groups will need to be set up first).

Scheduling Individual Reminders

As stated in the previous section, when you first access the Scheduling page (by clicking on the "Scheduling" header), by default it will open the Appointment Scheduler page. You can schedule an individual reminder by clicking on the time the reminder is for, in the specified venue of your choice. Alternately, you can also schedule individual reminders by clicking on the Individual Reminder subheading at the top of the page.   After you are on the individual reminder page, to add a reminder, follow these steps:

Step 1
Enter in the client's name in the Client Name box, beginning with their last name. If they are already in the system, their name will appear in a drop down box. You may then select that name. After the name is selected, you will notice that much of the information below is filled out with that particular client's details (This will depend on what information you entered for them when you added them, but in most cases, it will fill in the Client Phone Number, Email Address, and Client Cell number).

Step 2
Choose which phone message you would like to have sent to your client in the Phone Msg drop down menu. The available phone messages are defined on the Recordings page (The Recordings page will be covered in another section). You can choose whether or not the phone message gives any options and responses (such as to confirm the appointment, or be transferred to your business), and whether the message announces the clients name.

Step 3
Select the Event date by clicking on the button that looks like a Calendar on the Event Date / Time line. Alternately, you can just enter the date in the text box on that line. Also be sure to select the appointment time (**Note**: *if you used the Appointment Scheduler feature, this information will already be filled in*).

Step 4
Choose which Email/Text message you would like to send to your client. The available Email/Text messages in the drop down menu, are defined by the messages set up on the Email/Text page. Also select the Sub-Venue if there is one (You can setup sub venues under the Settings header), and the color code (this is used primarily for when viewing the appointment book; If you do not use the appointment book, disregard color code).

Step 5
Select the send time for this message from the Send Time drop down menu. On the line below you may also select the Time Zone (usually this is the same as your own, but you can alter this if you do have clients that are out of your time zone).

Step 6
Select your reminder methods. You will notice in the Reminder Method section of this page, there are check boxes for Phone, Email, and Text/SMS. Check the ones you wish to use. There are several options below the reminder methods. You can choose if you want to prompt your clients to confirm the appointment, if you want to send an additional text 1-2 hours prior to the appointment, or if you want to send a reminder right now.

Step 7
If you have completed the above steps, click the "Submit" button. Congratulations, you have scheduled an Individual Reminder!

Setting up Groups

Now that you know how to add clients into the system, and add individual reminders for those clients, let's talk about setting up groups of clients. Groups are used to send messages to a group of people, instead of just an individual.

To add a group, click on the "Groups" heading on the navigation bar. The Groups page will list the groups you have already added (next to each group are three buttons: the button that looks like two people will pull up who is in that group/allow you to add people to the group, the button with the note and pencil will allow you to edit the group name, and the red 'x' button will delete the group), and it has a blank text box with a button that says "Add New" next to it. Type in the name of the group you want to add in the text box, and then click on the "Add New" button. You will notice that the group name you typed in appears in the group list. Click on the button that looks like two people (this is the "Add/Remove/List Group Members" button) to edit your group.

Adding Clients to your Group

If you clicked on the "People" button (The "Add/Remove/List Group Members" button) next to your newly created group name, it will open the Add/Remove/List Group Members page. As you will notice, at this point there are no clients in your group. To add a client to your group, follow this process:

> **Step 1**
>
> Locate where it says "Filter by". You will notice next to Filter by: there is a drop down menu. Click on this drop down menu, and select "ALL" (***Please note***: *for the sake of this demonstration, we are using the ALL option, since you will probably not have many clients added yet. If you know the name of the client you wish to add, you can select that specific letter from the drop down menu instead*).
>
> **Step 2**
>
> Locate the name of the client you wish to add to the group. In the "Del/Add" column there should be a checkbox. Click this checkbox, and then press the "Submit" button at the bottom of the page. Your client should now be added to your group.

If you followed the above steps, you should have successfully added your first client to your group. To add more, follow the same basic process.

Scheduling Group Reminders

If you want to send a group reminder, click on the Scheduling tab button. After that page has loaded, click on the text just below the navigation bar that says "Group Reminders". This will pull up the Group Reminders page. If you want to send a Group Reminder, follow this process:

Step 1

Where it says "Group Name" there should be a drop down menu next to it. Click on this drop down menu, and select your group that you wish to send the group reminder for.

Step 2

Determine what date and time the event will be, and then set that up on the Event Date/Time section. Also in that section you can choose to select if the date and time is announced in the reminder or not by checking/unchecking the related checkboxes.

Step 3

Choose which messages you wish to send out under the drop down menus for "Group Phone Msg" and "Group Email Msg" (***Please note***: *these messages are defined in the Recordings and Email/Text pages. If you need to change these messages, you will need to change them there. We will go over that process further on in this guide*).

Step 4

Choose the send time for your Group Reminder (do this with the drop down menu next to "Send Time). If the time zone is different for this particular event, be sure to change that under the Time Zone section.

Step 5

Choose which methods you would like to remind your group by (As with individual reminders, you can remind by Phone, Email, or Text/SMS), and then choose if you want your clients to confirm, or if you want to send the reminder immediately.

Step 6

To finish setting up the reminder, click on the "Submit" button. If you feel like you need to start this process over, click on the "Reset" button.

If you followed these steps, you should now know how to set up a Group Reminder. Setting up a Billing Reminder involves groups as well.

Scheduling Billing Reminders

Billing Reminders can be sent out to a group of clients that are past due on their billing with your company. The first thing necessary to send a Billing Reminder is to set up a group with those who have accounts that are past due (Set this group up on the Groups page, following the Groups set up process) in it. You might call this your "Billing – Past Due" group.

After you have completed that process, click on the "Scheduling" headline in the navigation bar. Then click on the text that says "Billing Reminders", just below the navigation bar. This will pull up the Billing Reminders page. As you can see, this page is quite similar to the Group Reminders page, but with less options. To set up a Billing Reminder, do the following:

Step 1

Choose which group the Billing Reminder will be sent to in the "Group Name" drop down menu. Usually this will be your Billing/Past Due group, but you can send a Billing Reminder to whichever group you choose.

Step 2

Choose which messages you want sent out to your past due clients (These messages are detailed in the Billing section of the Recordings page, and the Billing section of the Email/Text page).

Step 3

Choose which methods of communication you would like to send your message by. After you have chosen your reminder methods, click on the "Submit" button. Your Billing Reminder will be sent out immediately.

Now you understand the process to send a Billing Reminder. In the next section of this guide we are going to discuss how to edit the messages that are sent to your clients.

Setting Up Reminder Methods

When a ReRemind account is created, it will pull over some information from your account, and create pre-recorded messages and email/text messages based on that information. However, most users will want something tailored to their needs, and with ReRemind you can do this.

Throughout this part of the guide we will cover the basics on setting up your own custom messages for your business in Recordings, Email, and Text/SMS. By using this information, you will be able to successfully create, and customize your messages.

Setting up Recordings

There are 3 types of Recordings you can create in ReRemind; Individual, Group, and Billing. ReRemind, by default, will have created some recordings when the account was created, but if you want to alter these messages, this part of the guide will help you in that process.

The first thing you will want to do is go to the "Recordings" page by clicking on the related button on the navigation bar. By default, it will pull up the Standard Recordings page first. Standard Recordings are recordings that are for individual appointment reminders.

The Recording Interface

Although there are 3 different sets of recordings you can set up, throughout the recording pages the interface is much the same. Before we start talking about altering your recordings, let us discuss the interface itself.

As you will notice when you pull up the Recordings page (You will be in the Individual Recordings section), there are a number of text boxes, some checkboxes with "ReRecord" next to them, and of course, a "Submit" button at the bottom.

> **Text Boxes** are where your message text is entered (ReRemind's text-to-voice system will read this text when it makes the call). Any time you make a change to this text, you will want to hit the "Submit" button at the bottom, after making the change, as well as check the "ReRecord" box. This will save the change, and re-record the message to the new text (***Please note***: *If you are recording your messages using your own voice, you will not need to check the ReRecord checkbox, since you are using your own voice as a recording*). Any time you want to return a textbox to the default message, simply clear the text completely from the box, and then hit the submit button.
>
> Check the **ReRecord** checkbox to have the associated message re-recorded.
>
> **Play** will play your message as it sounds on the phone. We recommend you use this feature to make sure the text-to-voice system is pronouncing your words correctly.

More Less/Options… on all three recording pages you will see this located next to the first text box. By clicking this option, it will show the additional messages you can record for whichever particular item the text is associated with.

Submit – you will want to click this button each time you make a change to the text in your messages, or wish to ReRecord something (for ReRecording you will have to have the ReRecord checkbox checked as well). By clicking "Submit", it will save the changes you have made.

You will also notice on the top of each recording page, there is a number to our Message Recording System (MRS), a User ID, and a User Pin Code. If you wish to record messages in your own voice, instead of the text-to-voice, you will need to call that number and record your messages that way.

Indvidual Recordings

The Standard Recordings page is recordings for individual appointments. The first text box, **Message #1** , is usually the "Introduction" part of your phone message. As you will notice, there is a "More/Less Options" text under where it says "Message #1"; by clicking this, it will allow you to alter the text for Message #2, Message #3, Message #4, and Message #5.

With each of these messages, you will notice that they have an "Event Name". You may change this Event name so that you can better remember what each message is (Remember: each time you make a change, you will want to hit "Submit" to save the changes).

The next box down the page is the "List Options" box. This is where your message will list the options for a response (1 = confirm, 2 = repeat, 9 = transfer to your business). You can alter this text to your preference. If you do not want to use the "Confirmation" option, simply omit that option from your voice message.

The last three boxes, are the response messages. The first two boxes are for the Option 1, and Option 9 responses, and the last box is what will play if the client does not choose one of the responses.

Group Recordings

The Group Recordings page, as you may have inferred, is for group reminders. The interface for Group Messages is almost exactly the same, so you should be able to follow the same basic set up process.

Billing Recordings

Billing Recordings are the messages that will be sent out to your past due Group of clients, when you schedule such a reminder. Once again, the interface remains much the same, but configured for billing instead of Individuals or Groups.

Setting up Email/Text

To create the email or text messages you will have to click on the "Email/Text" button on the navigation bar. By default it will pull up the Individual Email/Text Messages page first (this is the page for individual client reminders).

Email/Text Messages Interface

As with the recordings page, each page in the Email/Text group of pages has a description at the top of the page. All pages also have a default Main Message text that cannot be altered.

On each page there are 5 message boxes. These message boxes are where you can add any standard details for your messages that you wish to have appended at the end of each message. You will also be able to name each of these different messages (for example, the first one by default will show "your appointment". If you look at the Main message, it will list that event name in the body of the message) in their respective "Event Name" boxes. Billing Email/Text messages, do not have an event name, and neither does the Freeform message section.

Freeform messages are to be used if you need to send out a general message that doesn't fall under the individual, group, or billing format. It has sections for both 5 appended messages, and 5 individual text/SMS messages.

Any time you make changes to your messages, you will want to click the "Submit" button in order to save those changes. For the most part, each of the pages in the Email/Text Messages pages follow this same format.

So long as you understand the interface, and click the "Submit" button after making changes, you will be able to create your Email/Text messages with no problem.

Additional Items of Note

If you followed the instructions in the past two sections, you should now be able to understand how to create reminders, and create the messages associated with your reminders successfully. However, there are a few other things that do not fall into the set up category.

 These items were covered briefly in the Getting Started part of this guide, under where it talks about the Navigation interface. In this section, we will cover each of these items, in more detail so that you will have a better grasp of what these items do.

Reports

The Reports page allows you to view what reminders have been sent for today, tomorrow, or a specified month. When the page is first loaded, you will see that it has very basic information (It just shows the Sent and Confirmed reminder numbers).

If you want to see further details, just click on the Details button next to your preferred time period, and the Reporting section will expand to show you more information.

Settings

The Settings page has two separate settings sections (Account Settings, and Company Profile). Account Settings is where you set default send times for messages, default scheduling pages, default time zone, sub-venues, and color coding. The Company profile page is for account settings such as company, password, address, and so forth.

Reminders

The Reminders page allows you to view which reminders are being sent out for a specified date or period. It also allows you to edit the reminders that are scheduled (by clicking on the "Edit" button) next to the specified reminder. You may also view the reminders that were sent out in the past (these reminders will be "greyed" out).

Have Further Questions? Contact Us.

Located at the bottom of each page on the ReRemind site is a link to our "Contact Us" page. If you have any questions, at any time, please feel free to contact us. You can reach our support staff at support-staff@reremind.com, or you can call us Toll Free at (800) 820-9702.