



USER GUIDE

January, 2015

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Table of Contents

1. Accessing and Logging in.....	2
2. Account settings Home Page.....	3
3. Upload Reminder File.....	4
4. Enter Reminder List.....	6
5. Get/View	7
5.1 Daily Reminder Report.....	7
5.2 Get/View – Monthly Activity Summary Report.....	8
6. Review Your Current Reminders.....	9

1. Accessing and Logging In

1. From a web browser, type in the following URL: <http://www.reminderXchange.com>
2. Click the **Login** button in the upper right corner.
3. Enter your **Login ID** and **Password** and click the **Submit** button.

NOTE: A **Login ID** and **Password** will be issued upon filling out the Sign Up request form or calling reminderXchange directly to start a free-trial, pilot program.

4. You should now be logged into your account and see your Account ID/Name and User Name displayed.

Account Name:	<input type="text" value="Demonstration Client"/>	Account ID:	<input type="text" value="DEMO"/>
Account AddL1:	<input type="text" value="123 Beachwalk Ave."/>		
Account AddL2:	<input type="text" value="Suite 100"/>		
Account City:	<input type="text" value="Newport Coast"/>	State:	<input type="text" value="CA"/>
		Zip:	<input type="text" value="92929"/>

Primary Contact:	<input type="text" value="Georgia"/>	Secondary Contact:	<input type="text" value="Jim"/>
Primary Phone:	<input type="text" value="1-800-123-4567"/>	Secondary Phone:	<input type="text" value="208-555-1234"/>
Primary Email:	<input type="text" value="goergia@demo.com"/>	Secondary Email:	<input type="text" value="jim@demo.com"/>

Billing Preference: Bill My Credit Card Monthly Invoice Me Monthly

Credit Card Type:	<input type="text" value="Am Express"/>		edit credit card info
Name on Credit Card:	<input type="text" value="Geo Leisten"/>	Exp Date:	<input type="text" value="3/2012"/>
Credit Card Number:	<input type="text" value="####-####-####-4444"/>	Security Code:	<input type="text" value="###"/>

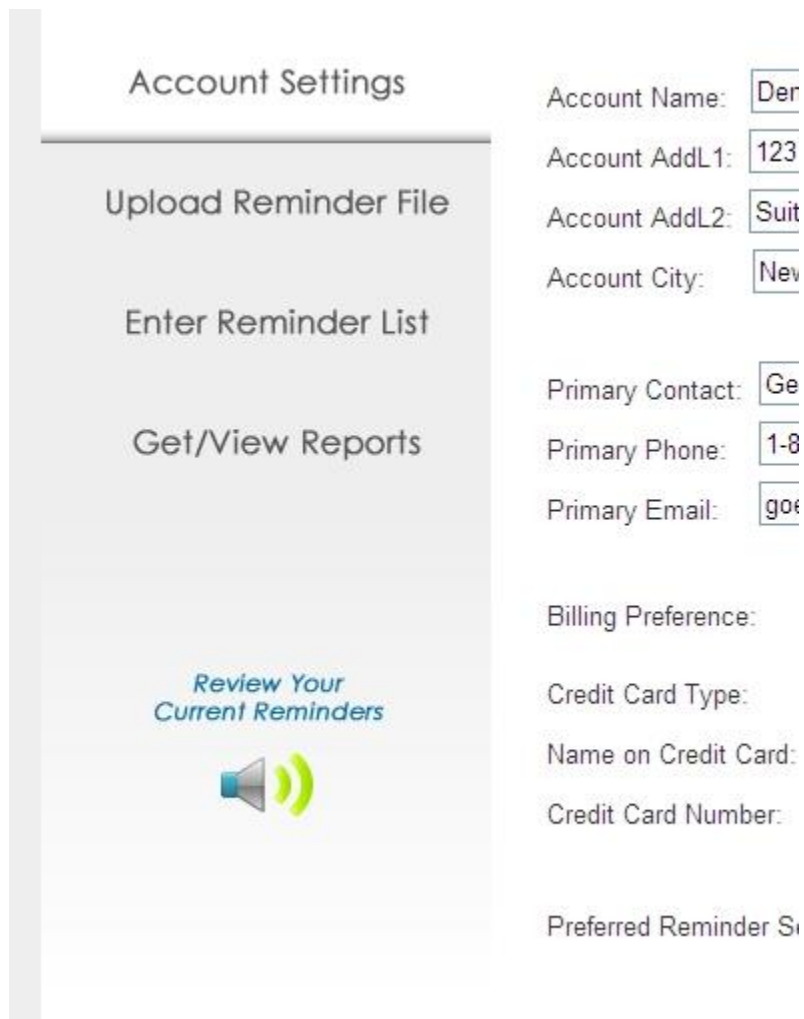
Preferred Reminder Send Time:

2. Account Settings Home Page

When a user logs into reminderXchange, they are taken to the **Account Settings** page. From here, the user can edit basic account information including phone number and credit card information, etc.

NOTE: This page also contains an **Account ID**, which is your unique four (4) digit account code.

Once logged in, you may access any tab/page from the **Content Menu** on the left side of the screen.



The screenshot shows the 'Account Settings' page. On the left is a vertical 'Content Menu' with the following items: 'Account Settings' (highlighted), 'Upload Reminder File', 'Enter Reminder List', 'Get/View Reports', and 'Review Your Current Reminders' (with a speaker icon). The main content area contains the following fields:

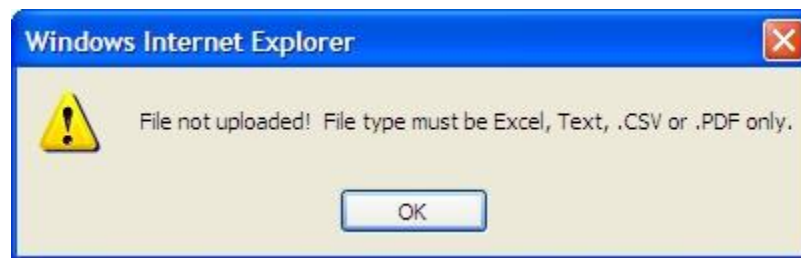
- Account Name:
- Account AddL1:
- Account AddL2:
- Account City:
- Primary Contact:
- Primary Phone:
- Primary Email:
- Billing Preference:
- Credit Card Type:
- Name on Credit Card:
- Credit Card Number:
- Preferred Reminder S:

3. Upload Reminder File

This feature allows users to send their reminder list(s) to reminderXchange for processing. Upon receiving uploaded files, reminderXchange initiates the process of contacting each person on the list via phone, email or text. Following are instructions for use and uploading:

1. Select the date for which you want the reminder calls/emails/texts to be sent. You may do so by clicking on the **Calendar** and selecting the desired date.
2. Click the **Browse** button and select the file to be uploaded.

NOTE: File types allowed for upload include: .CSV, .TXT, .XLS, .XLSX and .PDF. If you attempt to upload a file that is not of one of these types, you will receive the following message and your file will not upload.



3. Once you have selected a date and file, click the **Upload File** button.
4. You will receive a message that says you have successfully uploaded your file and the page will refresh.



NOTE: To view all files that have been uploaded in the current month, select [**View Current Month Uploaded Files**], [[View Current Month Uploaded Files](#)]

Account: DEMO - Demonstration Client

Current Month Uploaded Files

11-19-2010ReminderDailyCallListDEMO.csv
11-24-2010ReminderDailyCallListDEMO.xls
11-25-2010TestFile.txt
07-26-20112011-06-07 Alisha - Swim Lessons Receipt.pdf
07-31-201103 - HighSchools-costamesa.xlsx

Close

4. Enter Reminder List

NOTE: It is recommended to use the **Upload File** feature but the **Enter Reminder List** functionality is made available for quick-entry of a short list of calls/email/texts to be processed. This allows the user to enter all names, phone numbers and appointment information individually and send to reminderXchange for processing.

1. Select the date for which you want the reminder calls/emails/texts to be sent. You may do so by clicking on the **Calendar** and selecting the desired date.
2. Name the new **File/List**.
3. Enter each person on a new line. Each line must contain the person's name, phone number (or email address), appointment date and appointment time.

NOTE: Each line **must** use a comma separator.

- Click the **Submit** button.

NOTE: To view all files that have been uploaded in the current month, select **[View Current Month Uploaded Files]**, [\[View Current Month Uploaded Files\]](#)

5. Get/View

5.1 Get/View Reports - Daily Reminder Report

Users may view or download reports at any time. The Daily Reminder Report lists the results of all reminder messages that were sent on a given day. An example is shown below:

DAILY REMINDER REPORT						For Appts On: 6/17/2010
ABCD - ABC Medical Group of So Cal State						
	A	B	C	D	E	F
1	Patient Name	Patient Phone	Appt Date	Appt Time	Provider	Call Status
2	Adam	999-555-1234	17-Jun	9:00am	Dr. Brown	Call Made. Call succeeded
3	Adeline	999-555-1234	17-Jun	3:15pm	Dr. Smith	Call Made. Message left on answering machine
4	Alice	999-555-1234	17-Jun	11:30am	Dr. Brown	Call Made. Call succeeded
5	Alisha	999-555-1234	17-Jun	3:15pm	Dr. Jones	Call Made. Message left on answering machine
6	Alyssa	999-555-1234	17-Jun	8:45am	Dr. Brown	Call Made. Call succeeded
7	Andito	999-555-1234	17-Jun	1:45pm	Dr. Smith	Call Made. Call succeeded
8	Andronic	999-555-1234	17-Jun	2:00pm	Dr. Smith	Call Made. Call succeeded
9	Anita	999-555-1234	17-Jun	11:45am	Dr. Jones	Call Made. Message left on answering machine
10	Ann	999-555-1234	17-Jun	2:15pm	Dr. Jones	Call Made. Call succeeded
11	Anthony	999-555-1234	17-Jun	11:00am	Dr. Jones	Call Made. Call succeeded
12	Arik	999-555-1234	17-Jun	5:30pm	Dr. Jones	Call Made. Call succeeded

Summary totals are found at the bottom of the **Daily Reminder Report**, as shown, and the meaning of each total line is explained below.

107	TOTAL REMINDER COUNT: 104		
108			
109	TOTAL REMINDERS TO PERSON: 49		
110			
111	TOTAL REMINDERS LEFT ON MACHINE: 52		
112			
113	TOTAL REMINDERS UNSUCCESSFUL: 3		

- TOTAL REMINDER COUNT = The total number of people reminders were sent to.
- TOTAL REMINDERS TO PERSON = The total number of reminders that were picked up by a person either by phone or by text.

3. TOTAL REMINDERS LEFT ON MACHINE = The total number of reminders that were left on an answering machine, voicemail or sent via email.
4. TOTAL REMINDERS UNSUCCESSFUL = The total number of calls, emails or texts that were attempted but did not go through due to **no answer, invalid number** or technical issue.

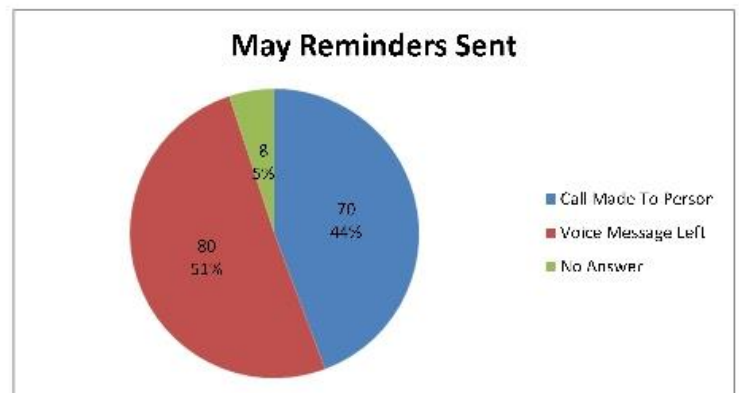
NOTE: To view the previous month’s **Reminder Reports** select [**View Previous Month Daily Reminder Reports**] near the bottom of the screen.

5.2 Get/View Reports - Monthly Activity Summary Report

The Monthly Activity Summary Report is a summarization of the entire month of reminder messages sent out. It illustrates both in numeric and chart view, the calls, emails and text message total counts and results for the month. This report also contains the supporting detail of each transaction (reminder message) for each month of the current year on separate tabs. It also contains Year-To-Date totals. An example of the Monthly Activity Summary report is shown below:

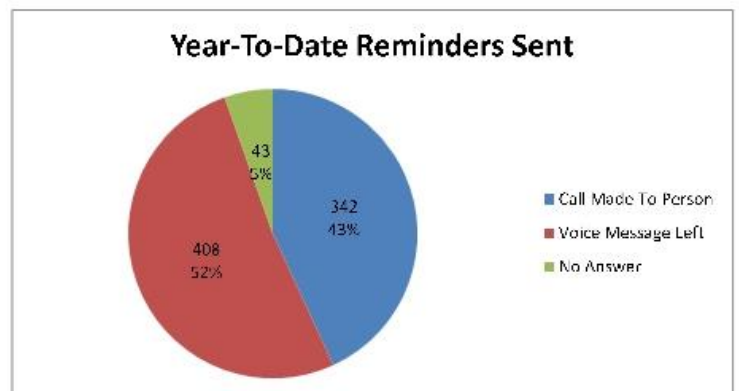
NOTE: To view all Monthly Activity Summary reports for the current year select [**View Monthly Activity Summary Reports**] near the bottom of the screen

MONTH 05 - MAY	Qty	Result
	70	Call Made To Person
	80	Voice Message Left
	8	No Answer
Total:	158	



Note: Calls recorded as 'No Answer' are after multiple attempts

YEAR-TO-DATE	Qty	Result
	342	Call Made To Person
	408	Voice Message Left
	43	No Answer
Total:	793	



6. Review Your Current Reminders

This option allows users to view or listen to the Voice, Text and Email reminder messages currently configured for use and active on their account.



1. To view or listen to a message, click on its line (link).
2. If you would like to have any messages altered, you may do so by going to the **Support** page and filling out the required information.
3. Enter the changes you would like made to your message(s).

Account:

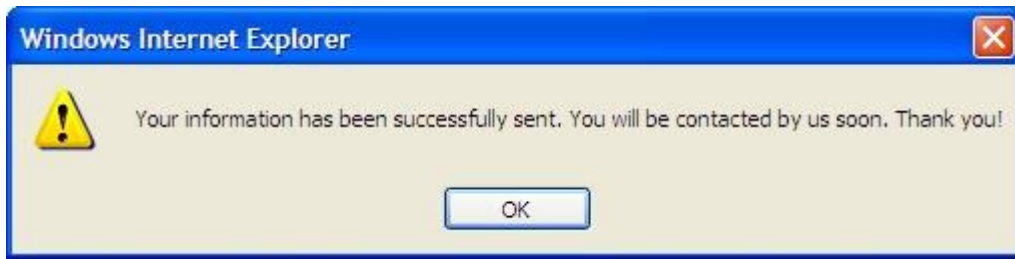
Please provide your name: * * required fields

email address: *

phone number:

Please describe the issue: *

4. Select **Submit**.
5. If your request was sent successfully, you will receive the following message:



NOTE: Upon receiving your request we will evaluate the changes and contact you to with any questions we may have or to let you know the estimated time of completion. You may also contact us at 1 (800) 345-8960, 7am-7PM PST., M-F.