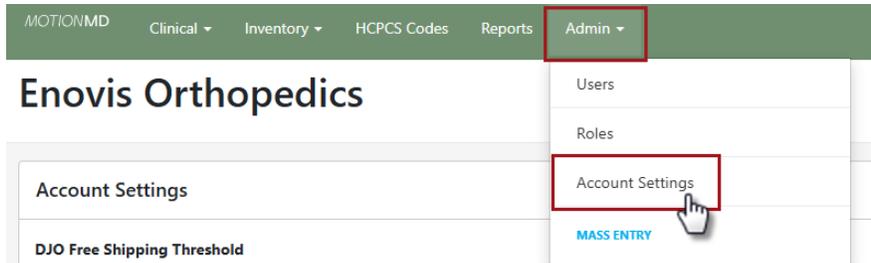


CUSTOM FOLLOW UP REASON FEATURE

A feature has been designed to allow Premium Customers to manually add Custom Follow Up Reasons to the current list of Global Follow Up Reasons. Customers must have the current Follow Up feature enabled to add and manage Custom Follow Up Reasons. Users with the Admin role will be able to access this feature.

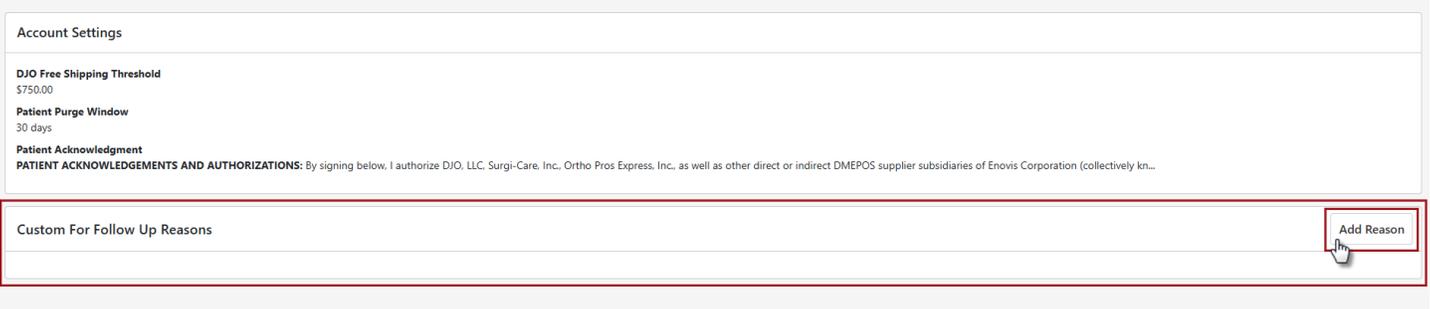
To view the feature, go to the Admin dropdown in the navbar and select the 'Account Settings' option.



A new section called 'Custom For Follow Up Reasons' will be displayed. Click the 'Add Reason' button to add a new Reason.

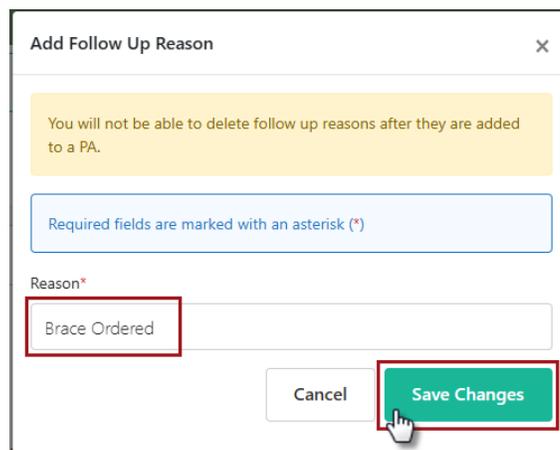
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A modal will open to add the custom Reason name, then click 'Save Changes'.

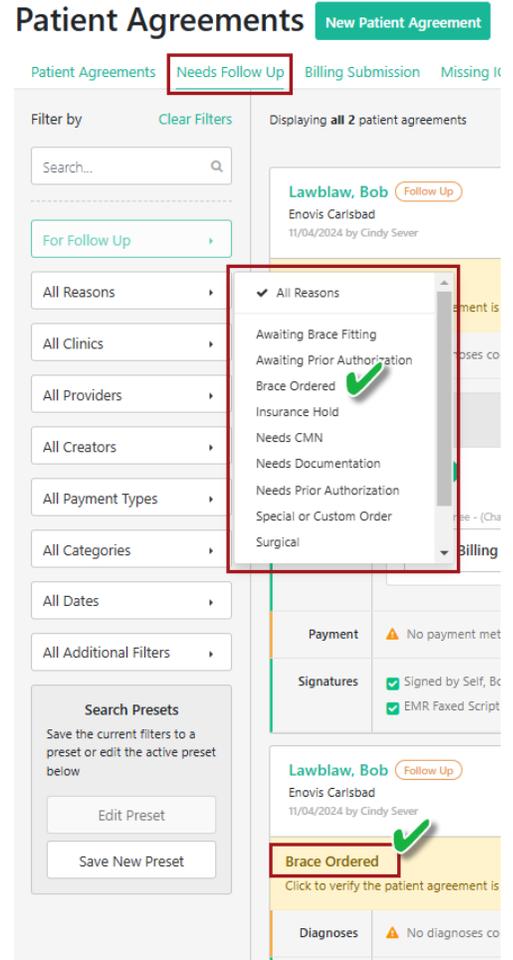
Note: There is a 40-character limit to a Reason name, but no limit on how many Reasons can be added.



CUSTOM FOLLOW UP REASON FEATURE

Once the new Reason is added it's visible on the Follow Up Reason dropdown list on the PA page and on the Needs Follow Up tab.

Any Custom Reason added will be listed alphabetically with the Global Follow Up Reason list.



Note:

- When a Custom Follow Up Reason is in use or tied to a PA, it cannot be removed from the list of Custom Reasons, the remove button is greyed out. Once the Reason is no longer tied to any PA, it can be removed from the list.
- The Reason can be Edited at any time. If it is tied to a PA, the Follow Up Reason will be updated on the PA.

