Sort and Filter the Reminders List

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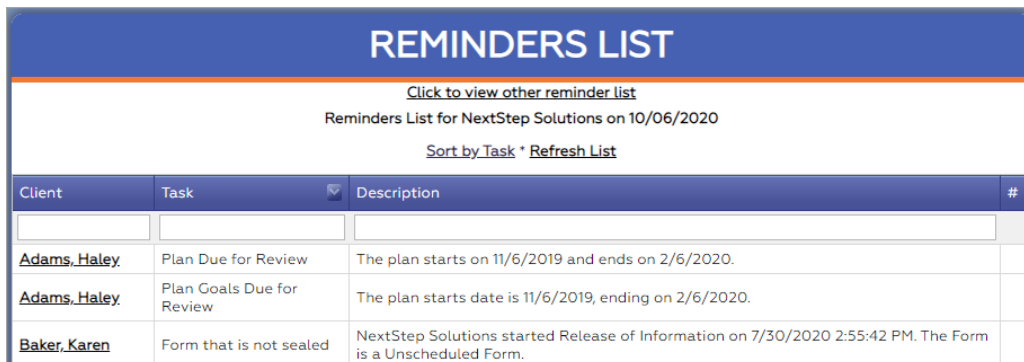
Path: Navigation Menu > Reminders

About

The Reminders List features functionality to reduce the amount of information a user is viewing all at once. Some of these options are available at the top of the Reminders List window and apply to the Reminders List as a whole. Section-specific options are located in each section of the Reminder List. To revert to the prior Reminders List view, simply click **Click to view other reminder list**, located at the top of the Reminders List window.

- Sort and Filter the Reminders List, by Client
- Expand or Collapse the Reminders List
- Filter Sections of the Reminder List
- Filter Date Columns

Sort and Filter the Reminders List, by Client

1. Click **Sort by Client** located at the top of the Reminders List. The Reminders List is re-displayed, sorted by Client Name.

2. Filter the list by **Client, Task, and/or Description** by entering text into each of the fields located below each column header. The more filters that are added, the more focused the list becomes. Prev and Next buttons are located at the bottom of the window to easily move forward and backward between pages.
3. To clear filters, click the **Clear** button.
4. To return the view of the Reminder List to Task view, click **Sort by Task**.

Expand or Collapse the Reminders List

The **Collapse All** and **Expand All** options located at the top of the Reminders List window are used to expand or collapse all sections of the Reminders List. To expand of collapse individual sections of the Reminders list, simply click the **Expand** button

 or the **Collapse** button located in each section header.

Filter Sections of the Reminder List

Each section of the Reminders List is displayed in columns. Each column can be filtered by entering text into the field located below each column header. Columns that anticipate date entry include a date picker that is displayed by clicking the **Date Picker**

button ⌄ in the filter field.

Filter Date Columns

Column headers for various date fields include additional search options that offer a wider date span than a single date.