



Q: Are there any type of “pop-up reminders” in MagicBase Pro?

A: Not yet... Not like in the previous version of MagicBase.

Previously, you could set one reminder with one date for each customer to have it magically pop-up when the date arrived.

It was a good way to be reminded of actions to do.

That will be added in an upcoming version of MagicBase Pro. When it is fully implemented, it will be better than the original. It will consist of two filters working together: 1) Date-specific pop-up reminders and 2) Event Actions Reminders.

Currently, just the second part (Event Actions) of this has been implemented in MagicBase Pro. Event Actions are global reminders for a series of actions to perform based on the current date, the date of the event, and the booking status. For example, there may be a set of actions that you’ll perform with almost every customer like: send a contract, send publicity materials, do a reminder call, send a Thank-you note, etc.

You would usually do these actions in the same order at approximately the same time relative to when the event is. So Event Actions allow you to pre-program these reminders to apply to all customers. This reminder system may cover many of your standard actions that you need to be reminded of.

Eventually, we’ll have pop-up reminders that are specific to each particular customer. And these will be tied in with the Event Actions to make a powerful reminder system. But, until that time, is there anyway to be reminded of specific actions to take with a customer? Yes, of course. Here’s how:

1. Use the ‘Pending’ booking status.

Set the reminders:

- If there are still things that you need to be reminded of, then set the booking status to Pending.
- Type some notes in the ‘Event Notes’ field. It’s huge, so there’s lots of space to type in notes. You could also set the font color to red to be sure that you don’t miss the reminder.

Search:

- Then you can do a search for all events that are pending. (Click on the ‘Find’ button; then click on ‘Pending’ on the Events screen; then hit the Return key.)
- Then you can easily browse through the list to see what you need to do yet.
- An alternate way to search for Pending events is from the All Events Screen (List view of the Events Screen.) Just click on the ‘Pending’ filter and the ‘Future’ button to see all upcoming Pending Events.

2. Use the 'Category' check box.

Instead of using the 'Pending' booking status field, just click in the first check box on the Label tab of the Customers Screen. The check box will be a marker that you set for all customers that you have to be reminded about. Then you can do a search on that checkbox field, and browse through each customer to see what needs to be done.

An advantage of using this checkbox field as a reminder is that there is a separate tab for it in list view of the Customers Screen. So, once you have these boxes checked, you can easily do a search for them by switching to list view of the Customers Screen. Then just click on the 'Tag' tab and all of the tagged customers will be sorted to the top. Then you can easily scan them to see what actions need to be accomplished.

3. Add another event

If you really want to have a reminder that is tied directly to a date and is easy to find, then here is the method for you:

Set the reminders:

- Create a new event for a customer.
- Set the date to when you want to be reminded of something to do.
- Also type a description of the activity as the *name of the event*, such as "Call today", or "meet 9/2/09."

Search:

- You can search for an event that needs to be done *today*, on the Events Screen. Click on the Find button. The screen will turn red to indicate Find Mode. Click on the Date Selector button. The mini-calendar will appear. Click on the 'Today' button at the bottom of the Date Selector to select today. Then click on the 'Go' button. Only events that are for today will appear.

- Another very efficient way to browse for actions to do is using the All Events Screen. If you have your actions typed into the Event Name field, then when you're on the All Events Screen, you'll see a chronological list of events, including the actions that you need to do. So you can just scan the list to see what needs to be done today, and what is coming up.

So, until the automatic pop-up reminders are programmed into MagicBase Pro, these are three ways that you can be reminded of actions to do.