



All About Reminders

“The Pop-Up Reminders”

Use pop-up reminders to stay on top of important tasks and complete them in a timely

Reminders

Activate the Reminders window by clicking on the Reminders button on the form view of Events.

Done?	Action	Sort 'Action' or 'Date'	Date								Notes
<input type="checkbox"/>	Send a personal email	anytime after	6/1/2013	or 8 days	Before the	No	event.	Annual Meeting		write note here	
<input type="checkbox"/>	Signed contract received?	anytime after	6/7/2013	or 365 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Export to MB Mobile	anytime after	6/12/2013	or 360 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Contact to book a show	anytime after	4/5/2014	or 300 days	After the	No	event.	Annual Meeting			
<input type="checkbox"/>	Send email	anytime after	4/5/2014	or 300 days	After the	No	event.	Annual Meeting			
<input type="checkbox"/>	Send Promotional info	anytime after	4/8/2014	or 60 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Call to sell show for event	anytime after	4/22/2014	or 317 days	After the	No	event.	Annual Meeting			
<input type="checkbox"/>	Call to confirm	anytime after	6/2/2014	or 5 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Print Referral Form, put in	anytime after	6/6/2014	or 1 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Check the map	anytime after	6/6/2014	or 1 days	Before the	Booked	event.	Picnic			
<input type="checkbox"/>	Send Wiley text msg with	anytime after	6/7/2014	or days	the		event.	Picnic			
<input type="checkbox"/>	Send Thank-you note	anytime after	6/8/2014	or 1 days	After the	Booked	event.	Picnic			
<input type="checkbox"/>	Call for referral	anytime after	6/11/2014	or 4 days	After the	Booked	event.	Picnic			
<input type="checkbox"/>	Send reminder for next	anytime after	4/3/2015	or 300 days	After the	Booked	event.	Picnic			
<input type="checkbox"/>	Contact to re-book another	anytime after	4/3/2015	or 300 days	After the	Booked	event.	Picnic			

The Reminders window displays all actions to do from all events.

Two filters control which actions are to be displayed:

- 1) The Action Date. The date must have been reached or passed.
- 2) The check box must be un-checked.

Event names are colored. Four different colors are used on the event name to help distinguish events. All of the actions for an event are the same color.

Controls in the header

Refresh - Click to remove any actions that have been checked off.

Done? - Many actions can be checked off and removed at once. Click the last action that you want removed, then click the 'Done?' button. All actions from the first (top) one to the last checked one will be checked off and removed from the Reminders list (but not deleted from Event Actions.)

Actions - Sort the Reminders list (up or down) by the name of the action.

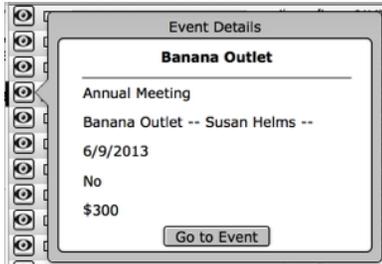
Date - Sort the Reminders list (up or down) by the date of the action.

Go to Events - Click to go to event of the currently selected action. (See the Selected Record Indicator I) on the left.

Save location & Close [x] - The size and position of the reminders windows can be saved.

Reminders at Startup - Check this box if you want the reminders window to pop-up when MBP starts.

Controls on the action line



Click the eye icon to see event details for the action.

Click the 'Go to Event' button to open the event in form view.

[] - Actions can be checked of in the Reminders window and they will be checked off in their Event Actions window. Click the 'Refresh' button in the header to removed checked actions from the list.

The actions description can be edited in the Reminders window. Just like doing so in the Event Actions window, the action description will turn blue to indicate that it has been changed from the standard actions.

Notes - notes can be added or edited. This note field also appears in the Event Actions window.