

# WMS: Did You Know?

## From Professor Merlot



### Reminders – where do you find them and are they handy?

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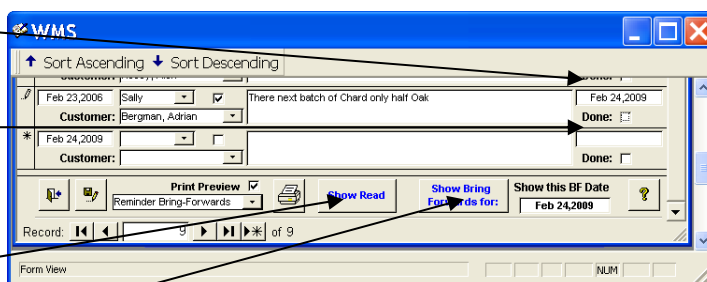
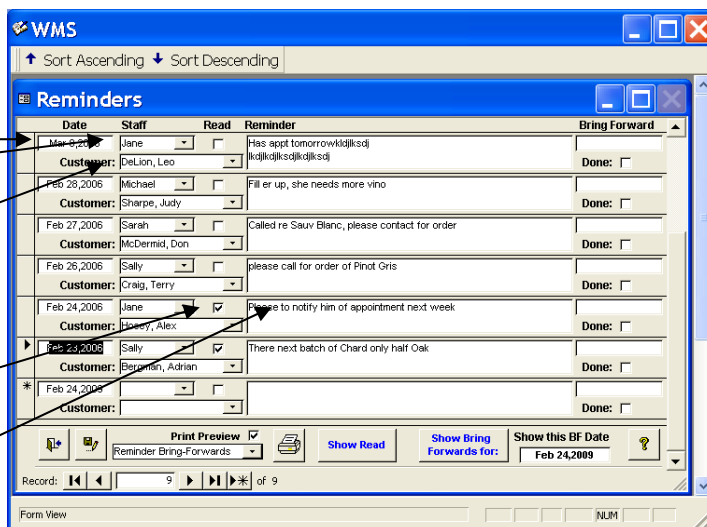
Tired of sticky notes cluttering up your desk and forgetting to complete something because you can't find the note you left for yourself? Put all those sticky notes in the garbage after entering them into the **WMS Plus** Reminder's form! It is easy to be more efficient!

#### Here's how:

- Function Key, **SHFT-F7** opens this feature at any time when you are running WMS or opens automatically when **WMS Plus** is first started.

#### Details:

- Each entry is its own specific reminder and is comprised of:
  - **Date** – date recorded
  - **Staff** – staff member who made the entry
  - **Customer** – if a specific customer requires attention, select the name using this drop down box.
  - **Read** – fill this checkbox if the reminder has been read by other members of your staff
  - **Reminder** – general information added about the reminder. After it has been read, a simple addition of the staffer's initials at the end of this reminder message is a good indicator who has read the message.
  - **Bring Forward** – this date field indicates when to show this reminder next.
  - **Done** – this checkbox is filled when the reminder has been completed on the **Bring Forward** date.
  - **Show Read** – this toggle button allows you to view all of the completed or uncompleted Reminders.
  - **Show Bring Forwards for:** - this toggle button works with the field "**Show this BF Date**". Pressing this button will display only the Reminders marked for the selected data.
  - **Reminder Bring Forwards** (report) – in the **Report Selector** (next to the printer button), you can print/preview the reminders for the selected entries displayed.



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### Reminder Uses:

- Customer Service:
  - A customer is owed a wine box or gift item:
    - **SHFT-F7**, add a Bring Forward entry to show the next time this customer is scheduled to arrive, and their gift is waiting for them.
  - An anniversary or birthday:
    - **SHFT-F7** to review, send a card or email of congratulations.
  - Thank You letters for referrals:
    - **SHFT-F7** to review, and print the letters from within WMS to acknowledge your appreciation for recommending new customers.
  - Top Sales Thank You letters:
    - **SHFT-F7**, send a card or email acknowledging those customers for being one of your top 50/100 etc, customers.
  - A customer is leaving your store and off-handedly mentions to call them when the next Limited Edition is arriving.
    - **SHFT-F7**, add an entry for this customer for you to call her in January when they arrive.
  
- Business reminders:
  - Accountant requests and schedules.
  - Contact suppliers about specific issues or orders.
  - Do your month end reports (the next release of WMS will include month end reminders displayed during the first 4 days of each month).
  - Newsletter items and schedules to be published.
  - New staff interviews or training.
  - Payroll schedules
  - Run your quarterly tax reports by reminding you to start work a week prior to submitting.

