



Memos

Memos are reminders that you can attach to individual records in your database. Use them to keep track of things you need to do, such as following up on an information request or an advertising sales call. Features include:

- Memos can be public (anybody can see them) or private (only their owner can see them)
- You can choose from a user-definable standardised set of followup actions
- Optionally show a list of your current Memos each time you log on to the database

Setting Up

In order to use Memos, you just need to place the **Memos** object onto your data entry form.

1. Choose **Admin** from the main tabs.
2. Select **Database Setup** from the topics on the left of the window.
3. Choose **Form Design Wizard** from the **Database Setup** submenu.
4. Select the table that you want to add the Memos to.
5. On the righthand side of the window, expand the **Objects** option.
6. Drag the **Memos** object from the **Objects** submenu and drop it onto your data entry form.

Adding a Memo

To create a new Memo:

1. Open a record in the table that you've added the Memos object to.
2. Ctrl-click/right click on the **Memos** area.
3. Choose **Add a new Memo** from the pop-up menu.
4. A new Memo opens up in a new window.
5. Enter a comment into the **Comments** field describing what the Memo is for.
6. Enter a brief summary into the **Key** field. This will be displayed in your Memo lists.
7. (Optionally) Enter a **Followup Date** to tell CatBase when you want to be reminded about this item.
8. By default all new Memos are **Public**, meaning that anybody using CatBase can see them. If you don't want anybody else to see the Memo, select the Private radio button. Then only you will be able to see it.
9. Optionally complete the other fields.
10. Click the **Save** button to save the Memo
11. It will then appear in the Memos list.

Editing a Memo

1. Double-click on it in the Memos list.

Finding Memos

1. In the topics on the left of every data table list you'll see a **Memos** option. Expand this option to see three choices:

All Memos

Show all Memos belonging to that table which either belong to you or are public.

Current Memos

Show all Memos for the table which have a Followup Date of today or earlier, and either belong to you or are Public

Search Memos

Open the Memo Search dialogue.

Show Current Memos when you log on

If you would like to automatically see a list of your current Memos each time you log on to CatBase, do the following:

1. Choose **Admin** from the main tabs.
2. Select **Users** from the topics on the left of the window.
3. Double-click your user record (if you haven't set up any Users, there will be one called Default User)
4. Select the **Present Memos on Startup** checkbox.
5. Save it.

Now each time you log on to the database, CatBase will search for any Memos belonging to you that have a Followup Date of today or earlier. If it finds any, it will display a list of them in its own window. You can double-click on a Memo in the list to open it up.