

Contactually 101: Step 2..... Setting up reminder times for your buckets

Now that you have buckets, you need to set some reminders for your buckets. You can do this using the gear sign near each of the bucket you want to edit, or you can go to the “edit buckets” link at the top of the Buckets page and edit a few at the same time. As an agent, I’d set the following buckets to have reminders.

Current Clients – every 7 days

Past Clients – every 30 days

Friends & Friends of Friends – every 30 days

Family – every 30 days

Received Referrals From – every 30 days