

## How to print Action/Conversation Diary Notes in REST Professional

#### Overview

The Action & Conversation Diary can be accessed from the Master files for Owners, Tenants, Properties, Creditors, Building & Strata plan and from any Transaction entry screens such as quick disbursements, creditor disbursements, rent receipts, & property maintenance section.

For various reasons, you may be required to print out your action/conversation diary notes.

The action/conversation diary can be printed in the following ways:-

- Accessing through Master files (ie the Owner, Property, Tenant Creditor card)
- Accessing through Other > Action/Diary
- Accessing through Other > Diary List
- Accessing through Reports > Actions Required

# Accessing through Master Files (ie the Owner, Property, Tenant, Creditor Card)

You can preview or print the action/conversation diary directly from the Master file that it is attached to. As an example of an Owner Action/Diary, do the following steps:

- 1. Go to Files > Owner Details and put in the alpha index of the Owner and press ENTER.
- 2. Click on Action-F1
- 3. Click on List
- 4. Click on List All-F4. The complete list should appear
- 5. Click on Print

🛐 Diary List									_ 🗆 ×
Items displayed: 16							Find		
Start Date/Time 🛛 🗸 Ty	pe	Assigned to	Subject	File Type	Alpha	! Completed	Created B;	/ Created Date	e 🔺
22/05/2013 07:11 PM	Other	None	Change of Ownership	Owner	AFFLECK	22/05/13	General us	er 22/05/13	
06/03/2013 11:38 AM	Letter	None	Owner letter sent.	Owner	AFFLECK	06/03/13	General us	er 06/03/13	
19/02/2013 01:29 PM	Email	None	email sent to owner	Owner	AFFLECK		General us	er 19/02/13	
11/09/2012 06:17 PM	Email	None	email sent to owner	Owner	AFFLECK		General us	er 11/09/12	
17/02/2011 10:31 AM	Lotter	None	C:\REST05\school\AdvanceCom\Word\owner.breach.doc;	Owner	AFFLECK	17/02/11	General us	er 17/02/11	
17/02/2011 10:30 AM	Letter	None	C:\REST85\school\AdvanceCom\Word\Owner Statement S	Owner	AFFLECK	17/02/11	General us	er 17/02/11	
17/02/2011 10:26 AM	Letter	None	C:\REST85\school\AdvanceCom\Word\offering incentiv	Owner	AFFLECK	17/02/11	General us	er 17/02/11	-
Selection Criteria									
Actions required on	ly 🛛	File File type		Period		Commercial Diary		Dancel	
Assigned to		Dwner	All     Include related	C 1 day	L.	Туре		Clear	
All     Only yours     C For others by you		Alpha AFFLECK Ben Alfleck & Jenn 158 Birchion Blvd	Fer Gamer Covers	C 1 week C 1 month C 3 months C Select		All Filter Only include items that	contain	Refresh	
C Another user C Manager		BEN BUCKLER PO	INT NSW 2026	From 01/01/00	V			Expanded View	
None	<b>V</b>	Home Phone: (02)	3375 3186 Mobile: 0409 320 079	To 31/12/99	~	Search subject Search comment		Print	

### Accessing through Other > Action/Diary

You can preview or print the Action/Diary. From this menu this will show you a complete list of all old, due and future actions/diary notes and defaults to showing all.

1. Go into Other > Action/Diary > List all Items opened to you

2101	REST Professional	- Rockend	Technology																	
File	<ul> <li>Transactions</li> </ul>	Reports	Cash Book	Holiday	Bookings	Other	Help		Clie	entID: RC	CK1050		S	witch to S	ales Toolb	r				
<b>P</b>	s 📣 🧈	\$ I	)	8 🦿	🏠 🔏	P	<b>1</b>	<b>6</b>		8	1		<sup>999999</sup>	14	8 👼	6		3		
	Action/Diary																			
	Subject						<u>T</u> 3	/pe												
	Comments											-								
												*		Cancel	ESC					
												-		Clear	F2					
	Start Date	Time 07:49 A	M 🗄 🔲	Duration	0 mins		Aa N	signed 1 Ione	ſo			•		Delete	- F3					
	Completed	luired												Duplicat	9 - F8					
		07.	/11/2013 🖃	07:49	АМ									Calen	tar					
1	Created 07/11/2	2013 07:49	AM By: (	General use	r									List		List All	I - F4	E5		
														Print		List all	open ite	ems for you	by you	
0	Does this diary i	tem link to	a file?											OK · F	12					

- 2. All the action/diary information should now appear. You can refine your search by selecting search criteria i.e.:
- Assigned to
- File Type
- Period (all, 1 day, 1 week etc)
- Type of diary note (file note, reminder, conversation)

🖥 Diary List									
Items displayed: 4								Find ]	
Start Date/Time 🛛 🖓	Туре	Assigned to	Subject		File Type	Alpha	! Completed	Created By	Created Date
28/02/2014 05:52 PM	Reminder	Clark Kent	actoin required		Tenant	ANISTON		Clark Kent	25/02/14
25/02/2014 02:21 PM	File Note	Clark Kent	TEST 2 - 24/02/14		Property	ARCH34		Clark Kent	24/02/14
25/02/2014 02:18 PM	File Note	Clark Kent	TEST 21/02		Property	AR.CH34	1	Clark Kent	24/02/14
19/10/2006 09:00 AM	Reminder	Clark Kent	Meet Harrison Ford at 1/10 Waratah St at 10ar	1	Owner	FORDH		Clark Kent	19/10/06
Selection Criteria									
<ul> <li>Actions required any</li> <li>Include completed</li> </ul>	File type	I AI	- Include related	Period Al C 1 day	Commercial	Diaty	Canad		
Assigned to C AI C Only yours C For others by you	Alpha		Owners     Proportios     Tenents	C 1 week C 1 month C 3 months C Select	AI Filter Only include iter	rs that contain	Refresh		
C Manager	<u> </u>		📕 Buildings 🗖 Holidey Bookings	From         D1/01/00         Image: Compared with the second seco	I Search subj I Search com	ect ment	Expanded View Print		

- 3. Click Refresh and your items will appear
- 4. Click on Print

#### Accessing through Other > Diary List

You can preview or print the Diary List. From this menu this will show you a complete list of all old, due and future actions/diary notes, but defaults to showing one month only and only items assigned to you.

1. Go to Other > Diary List

📕 Diary List									
Items displayed: 3								Find	
Start Date/Time 🛛 🗸	Туре	Assigned to	Subject		File Type	Alpha	! Completed	Created By	Created Date
28/02/2014 06:52 PM	Reminder	Clark Kent	actoin required		Tenant	ANISTON		Clark Kent	25/02/14
25/02/2014 02:21 PM	File Note	Clark Kent	TEST 2 - 24/02/14		Property	ARCH34	1	Clark Kent	24/02/14
25/02/2014 02:18 PM	File Note	Clark Kent	TEST 21/02		Property	ARCH34	1	Clark Kent	24/02/14
Selection Criteria	File			Period				4	
Actions required only	File type			CAL	Commercial	Diary	Cancel		
Assigned to	All		Include related	C 1 day	Туре		Clear		
C All C Only yours C For others by you			Owners     Properties     Tenants	1 month     3 months     Select	All Filter Only include ite	ms that contain	Refresh		
C Another user C Manager			Buildings     Holiday Bookings	From 25/02/14	Search sub	ject	Expanded View	]	
INone				124/03/14	Search con	ment	Print		

- 2. All the action/diary information assigned to you should now appear for the next month's period range. You can refine your search by selecting search criteria i.e.:
- Assigned to
- File Type
- Period (all, 1 day, 1 week etc)
- Type of diary note (file note, reminder, conversation)
- 3. Click on Refresh and your items will appear
- 4. Click on Print

### Accessing through Reports > Actions Required

You can view a complete list of actions required. This report default to show actions due now or overdue, however, you can change actions to date if you require seeing future actions required that is due.

- 1. Reports > Other > Actions Required and change the Actions To Date if necessary
- 2. Click Preview-F11 or Print-F12

REST Professional Software System (11.0.06) ©Copyright 2014 - Rockend Technology Pty Ltd Page: 001 Date: 25/02/14 Rockend Technology ROCKEND REAL ÉSTATE TRUST ACCT DIARY ACTIONS REQUIRED Active Status: Active All property managers Actions to 25/02/14 File Type Details Start Date Op Comments FORDH Harrison Ford 19/10/06 CK Meet Harrison Ford at 1/10 Waratah St at 10am Owner Meet Harrison Ford at 1/10 Waratah St at 10am Property STAR55 55 Star Street WAVERTON NSW 2060 29/10/08 ## sdfsdfds sdfsdfds MOORE15 15 Moore Court SYDNEY NSW 2000 29/10/08 ## Pay rates in instalments Property Pay rates in instalments Property HOLIDAY holiday property 18/02/11 ## 3 NIGHT MINIMUM STAY 3 NIGHT MINIMUM STAY 16/03/11 ## AIR CON INSPECT DARL722/1 Shop 1/722 Darling Street BALMAIN NSW Property INSPECT AIR CON WHEN INSPECTING ARCH34 34 Archer Street CHATSWOOD NSW 2067 25/02/14 CK TEST 21/02 Property TEST 34 Archer Street CHATSWOOD NSW 2067 25/02/14 CK TEST 2 - 24/02/14 Property ARCH34

TEST

#### 02/02/2016 10:47 am AEDT