

# How to Setup and Use Pop up Reminders

## Overview

You have the option to enable pop up reminders as part of the Action/Conversation diary that will pop up on your REST Professional desktop to alert you of an entry on your calendar.

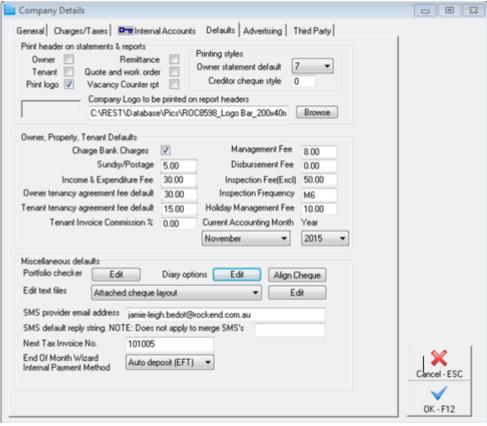
This document will cover:

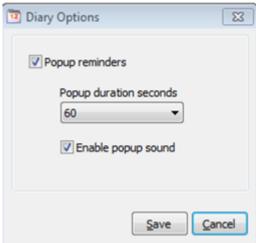
- How to Activate Popup Reminders
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## How to Activate Popup Reminders

The highest security level will be required to be able to edit these options the following options.

- 1. Go to Other > Utilities > Company Details > Defaults Tab
- 2. Click on **Edit** next to the **Diary Options** menu





#### 3. Tick Popup reminders

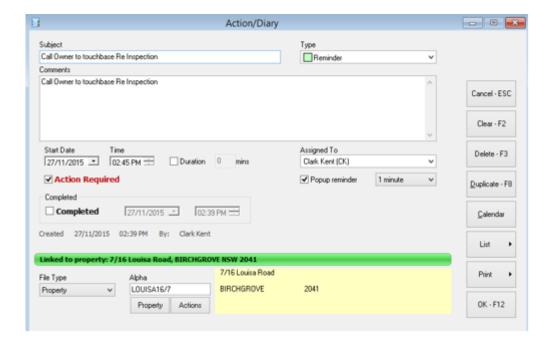
- 4. Select the duration for the popup reminder
- 5. If you would like to have sound, tick the **Enable popup sound** box
- 6. Click on Save
- 7. Click **OK-F12**

### How to Use Popup Reminders

Pop up reminders can be added to the Action Diary. If you require a popup reminder to appear on your Windows Task Bar to remind you when the action is due, tick on the checkbox and enter the number of minutes warning you require. While the action is still due, the reminder will pop up at regular intervals governed by the popup time. When the reminder pops up, you can click on the reminder and the action due will be displayed.

#### 1. Go to **Other > Action Diary**

- **Subject** Enter the subject of your reminder
- Type Select a type as Reminder
- **Comments** Add the comments for your reminder
- Start date and time If you are entering a conversation or file note, leave the start date as today. If you are entering an action item, enter the date and time that the item is to be actioned. When action items are due, they are displayed in the portfolio checker and when you access the owner, property etc.
- **Duration** If you want to block out time on your calendar to deal with this action, enter the number of minutes to be blocked out.
- Action Required Tick this box
- **Popup reminder** Tick this box to activate the popup reminder
- Completed When the 'Action required' checkbox is unchecked, REST will automatically tick
  the 'Completed' checkbox and enter the completed date and time or you can manually select
  the completed date and time at any time.
- **Does this diary item link to a file** Click on this icon, select the master file i.e. Property and enter the property that relates to this reminder



#### 2. Click **OK-F12**

3. At start time of the reminder a popup will appear at the right hand side of your screen for you



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