

Reminders Setup and Use Guide

Introduction

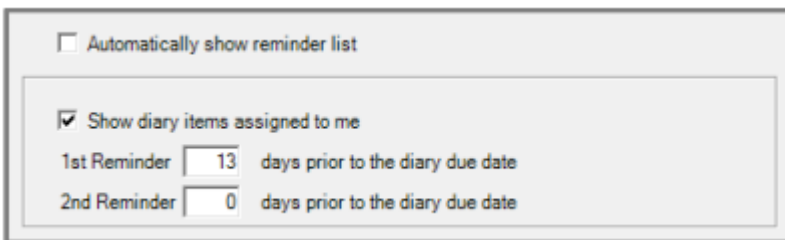
You are able to configure alerts to remind you of important tasks to be completed. All preferences are user based, meaning that you will be alerted to the tasks that are important to you.

All alerts, with the exception of the Proxy reminder will continue to be displayed on the reminder list until such time as you have addressed the issue.

Manage | Reminders Configuration

There are three separate areas of configuration for Reminders:

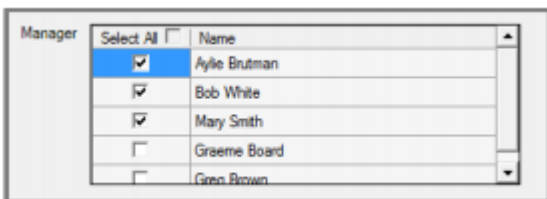
1. Set personal preferences for when the reminders are displayed, and also if you wish to be alerted to items in your User diary.



The screenshot shows a configuration window with the following options:

- Automatically show reminder list
- Show diary items assigned to me
- 1st Reminder: days prior to the diary due date
- 2nd Reminder: days prior to the diary due date

2. Select which manager(s) you wish to follow, which determines the buildings which included in your alerts



The screenshot shows a table with the following data:

Manager	Select All	Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ayle Brutman
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bob White
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mary Smith
<input type="checkbox"/>	<input type="checkbox"/>	Graeme Board
<input type="checkbox"/>	<input type="checkbox"/>	Greg Brown

3. Set which functions you want to be reminded of and the criteria for two alerts; the first reminder will appear in **amber** on the list and the second reminder will appear in **red**.
 - Tick the checkbox to the left of any function you want to be alerted to.
 - Set the preferred number of days before or after an event occurs in the 1st Reminder and 2nd Reminders columns.

Select All <input type="checkbox"/>	Function	Criteria	1st Reminder	Type	2nd Reminder
<input checked="" type="checkbox"/>	Insurance Policy	Prior to the expiry date	30	Days	0
<input checked="" type="checkbox"/>	Insurance Valuation	Prior to the due date	30	Days	0
<input checked="" type="checkbox"/>	Insurance Claim	After the claim date	31	Days	91
<input checked="" type="checkbox"/>	Contracts	Prior to the due date	30	Days	0
<input checked="" type="checkbox"/>	Compliance	Prior to the inspection date	30	Days	0
<input checked="" type="checkbox"/>	Annual General Meetings	Prior to the financial year end where no AGM date is set	30	Days	0
<input checked="" type="checkbox"/>	Meeting Wizard	After the meeting date where the wizard is not finalised	13	Days	20
<input checked="" type="checkbox"/>	By-Law Expiry	Prior to the by-law expiry date	30	Days	0
<input checked="" type="checkbox"/>	By-Law Registration	Prior to the by-law expiry date where the by-law is unregistered	31	Days	14
<input checked="" type="checkbox"/>	Proxies	Prior to the expiry date of the proxy	30	Days	7
<input checked="" type="checkbox"/>	Corp Diary Entries	Prior to the due date of the Diary entry	13	Days	0
<input checked="" type="checkbox"/>	Work Orders	Prior to the due date of the work order	13	Days	0
<input checked="" type="checkbox"/>	Quotes	Prior to the due date of the quote request	13	Days	0
<input checked="" type="checkbox"/>	Notices not printed	Prior to the due date of the levy	20	Days	0
<input checked="" type="checkbox"/>	Notices not emailed	Prior to the due date of the levy	20	Days	0
<input checked="" type="checkbox"/>	Lots with a Payment Plan	Show any lots marked with a payment plan	N	Lots	Y
<input checked="" type="checkbox"/>	Available Funds	Amount of total available funds in the working account	4999.00	Amount	999.00
<input checked="" type="checkbox"/>	Financial year end	After the year end where the rollover has not been completed	1	Days	30

Note: Where the logged in user is a manager you will be pre-selected in your reminder configuration which means that you will be alerted to all each function relating to your portfolio.

You may go back and change these preferences at any time.

As soon as you refresh, or relaunch the reminder screen, updated details will be displayed.

View | Reminders

The reminders screen will be shown on login when Automatically show reminder list is ticked in the configuration screen.

If the reminder screen is closed during the day, or not launched on login the user can open it from the main toolbar.



When the screen is launched the tasks are displayed based on the configuration saved for the logged in user as configured in Manage | Reminders Configuration.

The list of reminders is shown in order of severity, which allows you to work down your reminder list completing tasks in priority order.

To view further details for a reminder you can double click in the row, click Enter, click the link icon or F11 to launch the linked screen in STRATA Master. See below for details.

Name	Manager Name	Function	Detail	Due Date
The Owners Corporation of SP 3333	Michael Wright	Insurance Valuation	Ciadella Valuations	31/07/14
The Owners Corporation of SP 6666	Michael Wright	Insurance Policy	Strata	01/08/14
The Owners Corporation of SP 3333	Michael Wright	Insurance Policy	Building	01/08/14
The Owners Corporation of SP 4444	Amy House	Notices not emailed		01/08/14
The Owners Corporation of SP 3333	Michael Wright	Quotes	A.G Thomas Valuers	02/08/14
The Owners Corporation of SP 3333	Michael Wright	Quotes	ABC Locksmiths	02/08/14
The Owners Corporation of SP 3333	Michael Wright	Quotes	Action Lawns & Gardens	02/08/14
The Owners Corporation of SP 3333	Michael Wright	Quotes	Adept Insurance Brokers	02/08/14
The Owners Corporation of SP 3333	Michael Wright	Quotes	Australasian Fire Doors	02/08/14
The Owners Corporation of SP 2222	Michael Wright	Compliance	Annual Fire Safety Certificate	02/08/14
The Owners Corporation of SP 4444	Amy House	Work Orders	Fire Control	10/08/14
The Owners Corporation of SP 4444	Amy House	Compliance	Annual Fire Safety Certificate	10/08/14
Gregory Tzatzaki	Amy House	Owner diary	Owner Diary Entry - Lot 2	11/08/14
The Owners Corporation of SP 4444	Amy House	Corp Diary Entries	Repairs to Entry Door	12/08/14
The Owners Corporation of SP 4444	Amy House	Work Orders	Bill Lehane Glass	12/08/14
The Owners Corporation of SP 4444	Amy House	Insurance Valuation	Ciadella Valuations	14/08/14
The Owners Corporation of SP 2222	Michael Wright	Available Funds	\$1,200.00	30/06/14
The Owners Corporation of SP 4444	Amy House	Work Orders	ABC Locksmiths	31/08/14
The Owners Corporation of SP 5555	Michael Wright	Compliance	Annual Fire Safety Certificate	31/08/14
The Owners Corporation of SP 6666	Michael Wright	Compliance	Annual Fire Safety Certificate	02/09/14

Total 1st level reminders = 4 Total 2nd level reminders = 40

Toolbar



The toolbar functions allow for:

- Exit
- A report to be produced on screen listing the results in the reminders screen
- Link to open related screens
- The list to be refreshed
- In-system help specific for the Reminders function.

Using Filters

Filter names	Filter manager names	Filter functions	Filter details	From 01/05/13	To 31/07/14
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- You are able to filter the results on screen by completing any combination of the filters shown above the columns.
- You may enter any part of the word you are searching for in the filter boxes.
- Where you enters values in more than one filter only the results matching all filters will be displayed.
- If you selects to produce the Reminders report only the tasks shown on screen will be included in the report.

Summary Report

The report is a list of items in the order they are displayed on screen.

Users may choose to narrow down tasks on screen, and produce a report for the completion of tasks.

Report Viewer

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Reminders as at 27/08/2014

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Name	Manager name	Detail	Due Date
The Owners Corporation of SP 6666	Michael Wright	Insurance Valuation	01/01/13
The Owners Corporation of SP 4444	Amy House	Corp Diary Entries - CP Store Room: Replace Fire Door on Level 5	22/04/13
The Owners Corporation of SP 4444	Amy House	Contracts - Gardens & Lawns	24/05/13
The Owners Corporation of SP 4444	Amy House	Notices not emailed	01/11/13
The Owners Corporation of SP 4444	Amy House	Meeting Wizard - Meeting Follow up	20/12/13
The Owners Corporation of SP 4444	Amy House	Notices not emailed	01/02/14
The Owners Corporation of SP 4444	Amy House	Corp Diary Entries - Repairs to U1	01/05/14
The Owners Corporation of SP 3333	Michael Wright	Corp Diary Entries - Remove graffiti from external walls	01/05/14
The Owners Corporation of SP 4444	Amy House	Notices not emailed	01/05/14
The Owners Corporation of SP 2222	Michael Wright	Corp Diary Entries - Storm Damage	06/05/14
The Owners Corporation of SP 2222	Michael Wright	Corp Diary Entries - Obtain quotes for new letterboxes	06/05/14
The Owners Corporation of SP 2222	Michael Wright	Work Orders - Betta Slide Doors & Windows	06/05/14
The Owners Corporation of SP 2222	Michael Wright	Quotes - ABC Locksmiths	06/05/14
The Owners Corporation of SP 4444	Amy House	Insurance Claim - Hail Damage	24/05/14
The Owners Corporation of SP 5555	Michael Wright	Available Funds - \$896.25	30/06/14
The Owners Corporation of SP 5555	Michael Wright	Financial year end	30/06/14
The Owners Corporation of SP 2222	Michael Wright	Financial year end	30/06/14
The Owners Corporation of SP 5555	Michael Wright	Annual General Meetings	30/06/14
The Owners Corporation of SP 2222	Michael Wright	Annual General Meetings	30/06/14
The Owners Corporation of SP 7777	Amy House	Compliance - Annual Fire Safety Certificate	10/07/14
The Owners Corporation of SP 3333	Michael Wright	Compliance - Annual Fire Safety Certificate	20/07/14

The details which will be shown in the Reminders screen for each function are detailed below:

Name	Manager Name	Function	Detail	Date
Body Corporate name	Manager Name	Insurance Policy	Policy type	Due
Body Corporate name		Insurance Valuation	Valuer	Due
Body Corporate name		Insurance Claim	Claim type	Claim
Body Corporate name		Insurance Commission	Policy type: Amount	Paid date
Body Corporate name		Contracts	Contract type	Due
Body Corporate name		Compliance	Compliance type	Due
Body Corporate name		Annual General Meetings	-	Year end
Body Corporate name		Meeting Wizard	Meeting status	Year end
Body Corporate name		By-Law Expiry	By law type	Expiry
Body Corporate name		By-Law Registration	By law type	Expiry
Body Corp name (lot no.)		Proxies	Name of proxy	Expiry
Body Corporate name		Corp Diary Entries	Diary Subject	Due
Body Corporate name		Work Orders	Creditor name	Due

Body Corporate name		Quotes	Creditor name	Due
Body Corporate name		Notices not printed	-	Levy Due
Body Corporate name		Notices not emailed	-	Levy Due
Body Corporate name		Levies not posted	Levy frequency	Levy Due
Body Corp name (lot no.)		Lots with a payment plan	Owner name	Action
Body Corporate name		Available Funds	-	Year end
Body Corporate name		Financial year end	-	Year end
Body Corp name (lot no.)		Change of Ownership	Owner name	Date of entry

Alerts from the User diary show the following details:

	User name	User diary	Diary Subject	Due
Creditor name	User name	Creditor diary	Diary Subject	Due
Owners name	Manager name	Owner diary	Diary Subject	Due

Linked Screens

For each function the user can open a related screen in STRATA Master where the task can be updated and completed as required. Below is the list of functions and linked screens:

Detail	Launch Screen
Insurance Policy	Corp Insurance tab
Insurance Valuation	Corp Insurance tab
Insurance Claim	Insurance Claim screen with claim highlighted
Insurance Commission	Corp Insurance tab
Contracts	Registers Contracts
Compliance	Registers Compliance
Annual General Meetings	Registers Meetings
Meeting Wizard	Registers Meetings Meeting wizard for selected meeting
By-Law Expiry	Registers By-laws
By-Law Registration	Registers By-laws
Proxies	Registers Proxies / Nominees
Diary Entries	Diary screen for specific item
Work Orders	Corp diary R&M work order
Quotes	Corp diary R&M quotes tab
Notices not printed	Levy Wizard Print levy notices Select OC screen with Corp prepopulated
Notices not emailed	Levy Wizard Email levy notices Select OC screen with Corp prepopulated
Levies not posted	Levy Wizard Main page
Lots with a payment plan	Corp Lot Levies tab
Available Funds	Corp screen
Financial year end	Corp screen

Frequently Asked Questions

I don't email levy notices for all plans so how will the Notices not emailed reminder work?

A reminder is displayed to issue levy notices based on the due date of the levy, together with the dates recorded on the Corp screen for Last levy notice printed and Last levy notice emailed.

The Email levy notices reminder will only be activated for plans where there is at least one lot which has the levy notice delivery set to email, in the Levies tab of the Owner screen.

Why is the first column of the Reminders blank?

For most reminders the body corporate name is displayed in the first column. If you have not recorded a body corporate name for your plans there will be nothing displayed.

The easiest way to determine which plans need the body corporate name to be added is to create a list of managed plans by running a Quick Report for Corporations for all manager plans, making sure that the body corporate name column is being displayed.

You can then sort the results by body corporate name by clicking on the column heading. For any plans with a blank name you can use the chain-link or F11 to open the Corp screen for the selected plan, and then enter and save the body corporate name.

Why are diary entries displayed for unmanaged plans?

If you have selected to view diary items assigned to me all items in your diary are included in your reminders.

If there are diary items open for unmanaged plans they will continue to be included in your reminder list until such time as the diary entry is closed in the Corp diary for the plan.

There are many old work orders on my list which require no further action; can I close them in bulk?

There is an option available in the Utility menu named Close Diary/Work Order Entry which allows you to close bulk work orders based on a plan, and date period.

Once all work orders are closed, then the diary entries can be closed using the same utility.

It is important to ensure that you take great care when closing work orders and diary entry items in bulk, as if you close any in error they cannot be re-opened.

I can see the frame of the Reminders screen, but no tasks are loading

To enable the Reminders feature on your network, Rockend.Strata.Reminders.exe needs to be added to your server and workstation firewall exclusions.

You can find this executable in your Strata Master installation directory.

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