

# How to Add an Action/Conversation Diary in REST Professional

## Overview

The Action/Conversation diary is to record File notes, Reminders, & Conversations against Owners, Tenants, Properties, Creditors, Building & Strata plan. You may also have reminders pop up when they reach their due date when you access the above Master files and also to appear on your portfolio checker.

This document will cover the two ways that you can add a new action/conversation diary:

- Through the Master File (Owner, Tenant, Property, Creditor)
- Through Other > Action Diary

## Through the Master File

An action diary can be added directly through the Master file. In this example we will add an action diary to the owner file.

1. Go to Files > Owner and enter the alpha index of the owner and press ENTER
2. Click on Action-F1
3. Fill out the fields, Select a Type for this Action
  - Subject - Add in a subject for the action/diary
  - Type - Choose from File Note, Reminder or Conversation
  - Comments - Add in comments

The screenshot shows the 'Action/Diary' window in the REST Professional software. The window title is 'Action/Diary'. The 'Subject' field contains 'Owner Note' and the 'Type' dropdown is set to 'File Note'. The 'Comments' field contains the text 'MUST call the Owner prior to arranging any Maintenance work on their properties.'. The 'Start Date' is '11/11/2013' and the 'Time' is '07:21 AM'. The 'Duration' is '0 mins' and 'Assigned To' is 'Test Test (TT)'. There is a checkbox for 'Action Required' which is currently unchecked. Below it, there is a 'Completed' section with a checkbox and fields for date and time, both currently empty. At the bottom, it shows 'Created 11/11/2013 07:21 AM By: General user'. A green bar highlights 'Linked to owner: Ben Affleck & Jennifer Gamer'. Below this, there are fields for 'File Type' (set to 'Owner'), 'Alpha' (set to 'AFFLECK'), and a yellow box containing the owner's details: 'Ben Affleck & Jennifer Gamer, 158 Brighton Blvd, BEN BUCKLER POINT NSW 2026, Home Phone: (02)9375 3186, Mobile: SILENT'. On the right side of the window, there are several buttons: 'Cancel - ESC', 'Clear - F2', 'Delete - F3', 'Duplicate - F8', 'Calendar', 'List', 'Print', and 'OK - F12'.

4. Tick option Action Required if you would like a Pop reminder to appear. This Action will appear in your Portfolio Checker and come up as a reminder when accessing that Master file.
5. Link the Action to the appropriate Master File if this has been accessed through Other > Action Diary
6. Click OK-F12
7. If you have ticked Action Required and no longer require this to appear in your reminders/portfolio checker you can mark it as Completed

## Through Action > Diary

1. Go to Other > Action Diary
2. Fill out the fields, Select a Type for this Action
  - Subject - Add in a subject for the action/diary
  - Type - Choose from File Note, Reminder or Conversation
  - Comments - Add in comments
  - Tick Action Required if required Click on Does this diary item link to a file and more fields will come up to attach this to the appropriate file type and the alpha index
  - Click OK-F12

**Action/Diary**

Subject: remind owner of maintenance

Type: File Note

Comments: lawns cut  
gardens edged

Start Date: 05/03/14 Time: 08:33 PM Duration: 0 mins Assigned To: None

Action Required

Completed:  Completed 05/03/14 08:33 PM

Created 05/03/2014 08:33 PM By: General user

**Does this diary item link to a file?**

File Type: None Alpha

Detail Actions

Buttons: Cancel - ESC, Clear - F2, Delete - F3, Duplicate - F8, Calendar, List, Print, OK - F12

NOTE: REST also records completed property maintenance jobs, inspections updated, change of ownership details, and letters, emails and SMS's sent.

02/02/2016 10:49 am AEDT