

## How to Setup and Use Property Reminders

### Overview

Property reminders are set up for tasks such as Fire Safety Inspections, Pest inspections, Swimming Pool inspections or any other property maintenance scheduled in for a reminder. From Version 18.5, unlimited reminders can be set up.

This document will cover:

- [How to Setup Property Reminders](#)
- [How to View Property Reminder Reports](#)
- [How to Configure Property Reminders in the Portfolio Check](#)

### How to Setup Property Reminders

- Go to **Other > Utilities > System Options**
- Click on the **Reminders** tab
  
- Enter unlimited Property Reminders, as per example above
- Click **OK-F12**
- Go to **Files > Property** and select the alpha index of the property you would like to set up a reminder for
- Click on the **Reminder** tab and tick the check box next to the Reminder you are setting up
- Enter in the Next date for the Reminder and any necessary notes
- Click **OK-F12**

### How to View Property Reminder Reports

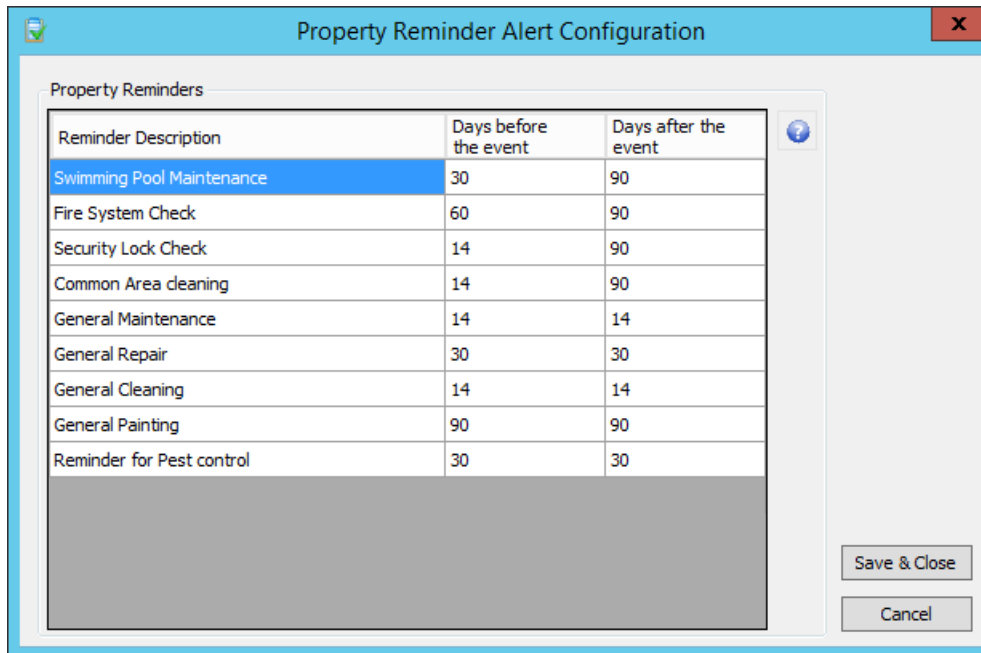
- Go to **Reports > Property > Reminders**
- Select the required Reminder category
- Enter in the selection criteria including Start and End dates or you can preview properties with no dates
- Click **Print-F12** or **Preview-F11**

**NOTE:** You can also set the reminders to appear on the Portfolio Checker when it loads each day which is setup against the user/password for the Property Manager

## How to Configure Property Reminders in the Portfolio Check

With the introduction of unlimited Property Reminders in Version 18.5, you will now be able to customise the unlimited Property Reminders on your Portfolio Check to specific alert start and end dates, for each reminder.

- Select the Portfolio Check Icon > Click Settings
- Click the green Plus Icon next to Property Reminders to access the Property Reminder Alert Configuration



On this screen you will be able to set a specific amount of days before the event and days after the event, for the Portfolio Check to alert you for each Property Reminder.

- Select '**Save & Close**' to save your changes

If you do not set specific days before the event or days after the event, the reminder will default to the Configuration setting that was set on the Portfolio Configuration Screen.

Portfolio Check Configuration
✕

Portfolio Check Configuration

### Portfolio Checker Alert Settings

These settings affect when alerts appear in the Portfolio Checker for incomplete events.

If the right hand column is left blank, the alert will continue to show for up to two years after an incomplete event is due.

Portfolio Item	Start alert	Continue alert until
Personal Diary	7 days before the event	7 days after the event
Linked Diary Items	7 days before the event	7 days after the event
Property maintenance	7 days before the event	7 days after the event
Inspections	7 days before the event	0 days after the event
Arrears will display for all tenants		0 days or more in arrears
Display vacant properties and properties vacating up to		0 days in the future
Lease Expiry	60 days before the event	30 days before the event
Rent Review	60 days before the event	30 days after the event
Insurances	30 days before the event	5 days after the event
Property Reminders <span style="color: green; font-weight: bold; font-size: 1.2em;">+</span>	30 days before the event	999 days after the event
Sales Diary	7 days before the event	7 days after the event
Commercial Diary	0 days before the event	0 days after the event
Property Information	30 days before the event	999 days after the event
Authority Expiry	60 days before the event	30 days before the event

Save Cancel

10/11/2020 9:02 am AEDT