

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
- How to Use Popup Reminders

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

Company Details

General | Charges/Taxes | **Internal Accounts** | Defaults | Advertising | Third Party

Print header on statements & reports

Owner Remittance Printing styles
 Tenant Quote and work order Owner statement default 7
 Print logo Vacancy Counter rpt Creditor cheque style 0

Company Logo to be printed on report headers
 C:\REST\database\Pics\ROC8598_Logo Bar_200x40n Browse

Owner, Property, Tenant Defaults

Charge Bank Charges Management Fee 8.00
 Sundry/Postage 5.00 Disbursement Fee 0.00
 Income & Expenditure Fee 30.00 Inspection Fee(Excl) 50.00
 Owner tenancy agreement fee default 30.00 Inspection Frequency M6
 Tenant tenancy agreement fee default 15.00 Holiday Management Fee 10.00
 Tenant Invoice Commission % 0.00 Current Accounting Month Year
 November 2015

Miscellaneous defaults

Portfolio checker Edit Diary options Edit Align Cheque
 Edit text files Attached cheque layout Edit

SMS provider email address jamie-leigh.bedot@rockend.com.au
 SMS default reply string. NOTE: Does not apply to merge SMS's
 Next Tax Invoice No. 101005
 End Of Month Wizard Auto deposit (EFT)
 Internal Payment Method

Cancel - ESC
 OK - F12

Diary Options

Popup reminders

Popup duration seconds
 60

Enable popup sound

Save Cancel

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

Action/Diary

Subject: Call Owner to touchbase Re Inspection
 Type: Reminder

Comments: Call Owner to touchbase Re Inspection

Start Date: 27/11/2015 Time: 02:45 PM Duration: 0 mins
 Assigned To: Clark Kent (CK)
 Action Required Pop up reminder 1 minute

Completed: Completed 27/11/2015 02:39 PM

Created 27/11/2015 02:39 PM By: Clark Kent

Linked to property: 7/16 Louisa Road, BIRCHGROVE NSW 2041

File Type	Alpha	7/16 Louisa Road	
Property	LOUISA16/7	BIRCHGROVE	2041

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

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



02/02/2016 10:59 am AEDT