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Viewing Reminders for Other Users

The article will assist any User to view Reminders for other Users, where that User is designated as a Manager.

Where is the Reminders Configuration ?

Go to Manage > Reminders Configuration

Manage	Accounting	Reports	Wizards	Co
Dian	y	Ctrl+D		
Regi	Registers			
Rem	Reminders Configuration			ł

The Reminders Configuration Screen

You can -

1. Tick the box "Automatically show reminder list' to have your reminder list show upon opening Strata Master

2. Set Reminders to show our diary items at a set number of days prior to due date.

3. Select to see all items or select only items of a chosen topic/action.

4. Tick the Manager box to view the Reminders for other Managers.

🔚 Reminders	Configuration	n					8
EXT	9 H						?
Manager	Select All	Name	Automatically show reminder	list			
	V	Gerald Manager					
	$\overline{\mathbf{v}}$	Meg Manager	Show diary items assigned to	ome			
	$\overline{\mathbf{v}}$	Sam Strata	1st Reminder 0 days pr	ior to the diary due d	ate		
		Trainee McTrainer	2nd Reminder 0 days pr	ior to the diary due d	ata		
			2nd Reminder 0 days pr	for to the diary due o	ale		
☐ Select	All Function		Criteria	1st Reminder	Туре	2nd Reminder	-
	Insurance	Policy	Prior to the expiry date	30	Days	0	
V	Insurance Valuation		Prior to the due date	30	Days	0	
V	Insurance Claim		After the claim date	31	Days	91	
V	Insurance	Insurance Commission After the policy date paid where commission is due but not receive		21	Days	45	
	Contracts		Prior to the due date	30	Days	0	
	Agency A	greement	Prior to the expiry date of the Agency Agreement Contract		Days	90	

What if a User Name is not Showing ?

The Users Profile needs to be ticked as 'Manager' to show in this Reminders Configuration.

Go to Configuration > Users



Then select the User >Click Edit and tick the box that says 'Manager' > Click Save

5. User Configuration	n - Edit Mode		>	<
		×		
Users				
Name	Login	Manager?	General Details Access Rights	
Administrator	administrator			Т
Clark Kent	ck	Yes	Edit Name Clark Kent	1
Gerald Manager	GM	Yes	existing	1
Lex Luthor	lex	V	user Login ck	1
Roy Reception	Beception	Tes	Password	1
Sam Strata	strata	Yes		1
Trainee McTrainer	training	Yes	Confirm password	1
			Work phone	1
				1
			Mobile phone	1
			Home phone Eav	1
				1
			Email	1
			Bate per hour \$ 20.00	1
				1
			Charge unit 0 minutes	1
			Managar II Active II	1
			imanagei; ir Active ir	1
			Notes	1
				1
			v	1
✓ Display	y active users only		,	1

Other useful Links -

Reminders Setup and Use Guide | MRI Knowledgebase (rockend.com) STRATA Master Top Tip #11 - Automatic Reminders | MRI Knowledgebase (rockend.com) STRATA Master Top Tip #37 - Negative Reminders | MRI Knowledgebase (rockend.com) STRATA Master Top Tip #15 - The User Diary | MRI Knowledgebase (rockend.com) 20/01/2025 6:44 pm AEDT