



## Add a Diary Item in Strata Master

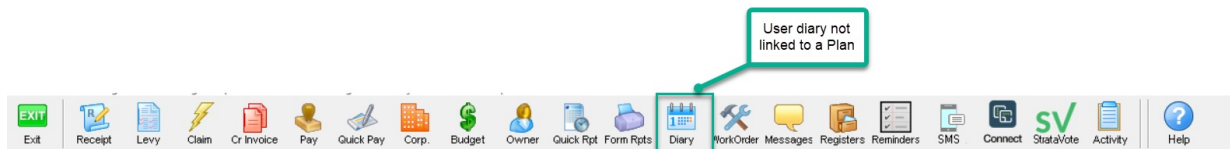
### Summary

Learn how to use the diary to record information other than work orders. Events can be diarised, as can jobs that are outside the reminder system activities, and management information about a specific Plan.

### Overview

There are 2 diaries, accessed from separate Diary icons.

The main icon toolbar -



The Plan toolbar in the Corp screen -



### The Steps to Recording An User Diary Item

In this example we will add a note to remind of end of financial year process.

1. Select the Diary icon in the Icon toolbar. enter a subject header and a date for the reminder. You can enter a date for the end of a lengthy contract or a reassessment of the item in a years time for example.

Date entered	Time entered	User	Notes	Time spent	Charge	Invoiced?	Work order #	WO Status	Repair Maint. #

2. Select 'details tab and enter first step or as much of the informaiton you wish to enter.

Diary Record      **Details**      Reporting

New Diary Entry

Prepare for end of financial year at beginning of May

Charging

Timer: 00:00:00.0      Charge it!

Start      Reset

Rate for \$ \_\_\_\_\_ per hour in \_\_\_\_\_ minutes increment

Total charge \$ 0 \_\_\_\_\_ for \_\_\_\_\_ (hh:mm)

3. Click the Save button. The diary entry then shows at the top of the Diary Item Headings.

Diary for TEST (Staff member) - Edit Mode

Diary records for TEST (Staff member)       Show open records only

Reference	Subject	For Action By	Date Due	Closed
	End of Financial Year Process	TEST	2025-05-01	No

4. To add to the diary item, select the Subject header. The notes at the bottom of the screen become visible.

5. Click on the details tab and enter further details as required.

Diary Record      **Details**      Reporting

New Diary Entry

Ensure all bank reconciliations are balanced. Address withdrawals that are overdue to be presented.

Charging

Timer: 00:00:00.0      Charge it!

Start      Reset

Rate for \$ \_\_\_\_\_ per hour in \_\_\_\_\_ minutes increment

Total charge \$ 0 \_\_\_\_\_ for \_\_\_\_\_ (hh:mm)

6 Click the save button. The new entry appears beneath the other entries.

Diary Record      Details      Reporting

Subject: End of Financial Year Process

For action by: TEST      Due date: 01/05/2025

Action required

Date entered	Time entered	User	Notes	Time spent	Charge	Invoiced?	Work order #	W/O Status	Repair Maint. #
2024-08-08	04:14 PM	TEST	Prepare for end of financial ye...		0	No			
2024-08-08	04:21 PM	TEST	Ensure all bank reconciliations ...		0	No			

7. You are able to edit previous entries and print or preview the entry.

**mri**      **Diary**  
Subject: End of Financial Year Process

**TEST (Staff member)**  
Action by TEST due by 01/05/2025      Status: in progress

Entry date & time	Entered by	Time spent	Charge	Notes
08/08/2024 16:14	TEST			Prepare for end of financial year at beginning of May
08/08/2024 16:21	TEST			Ensure all bank reconciliations are balanced. Address withdrawals that are overdue to be presented.
		0 hrs 0 min	0.00	

## The Steps to Recording a Plan Record to a Diary Item

In this example we will add information regarding device orders. The steps are similar to the above.

1. Select the Corp icon and enter the Plan number.
2. Select the diary icon.
3. Add the subject and required details as in the steps for the User diary item.

The screenshot shows a software interface for recording a diary item. The window title is "Diary for 2222 (Owners Corporation) - Edit Mode". The interface includes a toolbar with icons for "EXIT", "undo", "redo", "save", "print", "check", and "link". Below the toolbar, there is a table of diary records for "2222 (Owners Corporation)". The table has columns for Reference, Subject, For Action By, Date Due, and Closed. A checkbox "Show open records only" is checked.

Reference	Subject	For Action By	Date Due	Closed
2222 (Owners Corporation)	Device Orders	TEST	2025-01-08	No

Below the table, there is a "Diary Record" section with tabs for "Diary Record", "Details", and "Reporting". The "Diary Record" tab is active, showing a form with a "Subject" field containing "Device Orders". The "Details" tab shows a form with "For action by" set to "TEST" and "Due date" set to "08/01/2025". A checkbox "Action required" is checked.

Date entered	Time entered	User	Notes	Time spent	Charge	Invoiced?	Work order #
2024-08-08	04:29 PM	TEST	Remotes \$99 each incl gst and swipes \$42.00 each incl gst. Clients are ...		0	No	
2024-08-08	04:31 PM	TEST	Create a work order to the building manager. Client can collect the order...		0	No	
2024-08-08	04:32 PM	TEST	Create a Misc owner invoice against the relevant Lot for payment. Issue...		0	No	

4. You are able to edit previous entries and print or preview the entry.

08/08/2024 6:46 pm AEST