

# TRAINING REFERENCES



### Configure Reminders

You can configure Reminders to see all upcoming and overdue tasks or only tasks relating to a specific area. Reminders are user specific.


To configure Reminder, go to:

1. Manage > Configure Reminders
2. Select Edit
3. Select which manager you would like to see Reminders for
4. Select Function/s to set Reminders for
5. Set 1<sup>st</sup> and 2<sup>nd</sup> Reminder criteria– this determines when you will receive each reminder
6. Save

See the [Set Up & Use Guide](#) on the Rockend Knowledgebase for more information



### View Reminders

- Access reminders at any time using the Reminders icon on the STRATA Master toolbar 
- Configure Reminders to display on screen when you login to STRATA Master, go to;
  1. Manage > Configure Reminders
  2. Select the **Automatically show reminder list** checkbox
- Filter the reminder list by Name, Manager, Function, Details or Due Date
- Print a list of diary items, including details of the entry for User, Owners Corporation or Lot owner



### Create Reminders for Diaries

STRATA Master has three different diaries where you can create tasks and set reminders. These are the **Owners Corporation, Lot Owner & User** diaries.

To configure reminders for your diary entries go to:

1. Manage > Configure Reminders
2. Select the **Show diary items assigned to me** checkbox
3. Set 1<sup>st</sup> Reminder and 2<sup>nd</sup> Reminder days criteria – this determines when you will receive each reminder
4. Save

To create a Reminder for a diary item, you must enter a due date and select the **Action Required** checkbox on the Diary Record tab on the diary screen

For more information on creating Reminders for Diary entries, see the STRATA Master help file: Help > Details of Functions > Reminders

#### Owners Corporation Diary:

Access via the Corp Screen

Use for:

- General diary entries for the Strata Plan
- Repairs & Maintenance
- Time Based Charging
- Fee Charging

#### Lot Owners Diary:

Access via the Lot Owners Screen

Use for:

- Debt Recovery entries
- Recording Conversations
- Recording Complaints

#### User Diary:

Access via the toolbar in STRATA Master. This can be used as your personal diary

Use for:

- User entries
- View entries allocated to you
- View entries for Lot Owners & Owners Corporations assigned to you or created by you