



# Event Reminders

Property Management Solutions for Over 30 Years

## Overview

Event Reminders can be viewed in <<Profiles, Event Reminders>> or at logon, if the checkbox is marked in <<Setup, Environment Options, Logon and Printer tab>>.

**Environment Options**

Logon Options

Display Reminder Events

Windows Options

Allow Multiple Program Instances

Use Default Local Directory

1. Display 2. Dates 3. Logon and Printer

Event Reminders are universal, that is, everybody sees all those entered that are eligible for display.

Event Reminders

Date	Profile	Description
Event Date: 9/30/2018		Saturday September 22, 2018 through Sunday September 30, 2018
9/30/2018	BRUNO: Joseph P. Bruno	Lease Expires Sunday September 30, 2018
9/30/2018	PARSONS: Johnny Parsons	Lease Expires Sunday September 30, 2018
9/30/2018	HUDOCK: Francis Hudock	Lease Expires Sunday September 30, 2018
9/30/2018	CEDAR327: 327 Cedar Lane	NOTE: Schedule semi-annual walk thru.
9/30/2018	MAIN212: 212 Main Street	NOTE: Verify that work has been completed on the roc

*NOTE: If you use Manager profiles, manager reminders can be restricted. The default when looking at Event Reminders is to show all reminders for all profiles including all manager profile specific reminders. However, if the Manager User Name and the Logon User Name are the same, then the Event Reminder screen will show the manager-specific reminders for that manager and eliminate manager-specific reminders for other managers.*

NOTE: Any or all of the tenant events can be excluded from the events displayed. Go to <<Setup, User Settings, General tab>>. Mark those you don't want to see.

#### Event Reminder line items include:

- Tenant Events –
  - Lease Expirations
  - Move-ins
  - Move-outs
- Vendor events –
  - Insurance Expirations
  - Workman Compensation Expirations
- Note Reminders from all profiles –
  - Marked "Generate a Reminder"
- Categories from all profiles
  - If assigned a reminder type and date

The reminders and events that display are those with dates falling between last Saturday and this Sunday, plus past Note Reminders that have not yet been marked completed or deleted.

Nine different tabs are available to see subsets of the line items. An Edit Profile button takes you to the profile for events and category reminders. The Note Reminder line items can be edited and marked as Completed.

#### **Event Date**

This date field defaults to the system date but can be changed to another date to view the events encompassing that date. Events covering the period "Last Saturday through This Sunday" are displayed, and those dates are displayed in the field next to the Event Date.

#### **Line Items**

One line per event reminder is displayed. When put in edit mode by clicking on a line item, the entire note information is displayed. From the edit mode you can jump to edit the corresponding profile for events and category reminders and edit the note or mark the note as completed.

#### **Date**

The field contains the effective date of the event

#### **Profile**

This field displays the Record ID of the profile.

## Description

Part of the first line of the note text displays here when in single line mode. When in edit mode, the full note box is viewable.

The screenshot shows the 'Event Reminders' application window. On the left is a navigation menu with buttons for Profile Search, Dashboard, Internet Publishing, Profiles, AP, AR, GL, Maintenance, Reports, and Mailings. The main area displays a table of reminders with columns for Date, Profile, and Description. The selected row is highlighted in cyan. Below the table, there are navigation buttons for 'All', 'Past', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Previous Weekend', and 'Current Weekend'. At the bottom are 'Help', 'Calculate', and 'Cancel' buttons.

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9/30/2018	CEDAR327: 327 Cedar Lane	NOTE: Schedule semi-annual walk thru.
9/30/2018	MAIN212: 212 Main Street	NOTE: Verify that work has been completed on the roof and front porch.

When in edit mode, the following fields are also displayed:

### Note Text

The entire text of the note is viewable.

### Edit Profile

Takes you to the profile to make changes (for notes and category reminders).

### Edit Note

Takes you to the note to make changes (for notes).

### Completed

Removes the note from the list.