

Overview

A note can be associated with any of the following profiles: Management Group, Owner, Property, Tenant, Unit, Vendor and Property Manager.

There are Active notes and Recurring notes. Active notes include all notes entered as such and those recurring notes that were scheduled through the end of next month. Each day at the first logon to the database, the recurring notes are scanned to determine if any should be turned into an active note.

An active note consists of freeform text with an effective date. The note can be marked to append to a statement or generate a reminder. A note can be kept until manually deleted or marked to delete automatically. Internal use notations can be entered in the Comments field.

To enter a note, click on the Note button from any profile. A note history screen that includes all active notes will display.

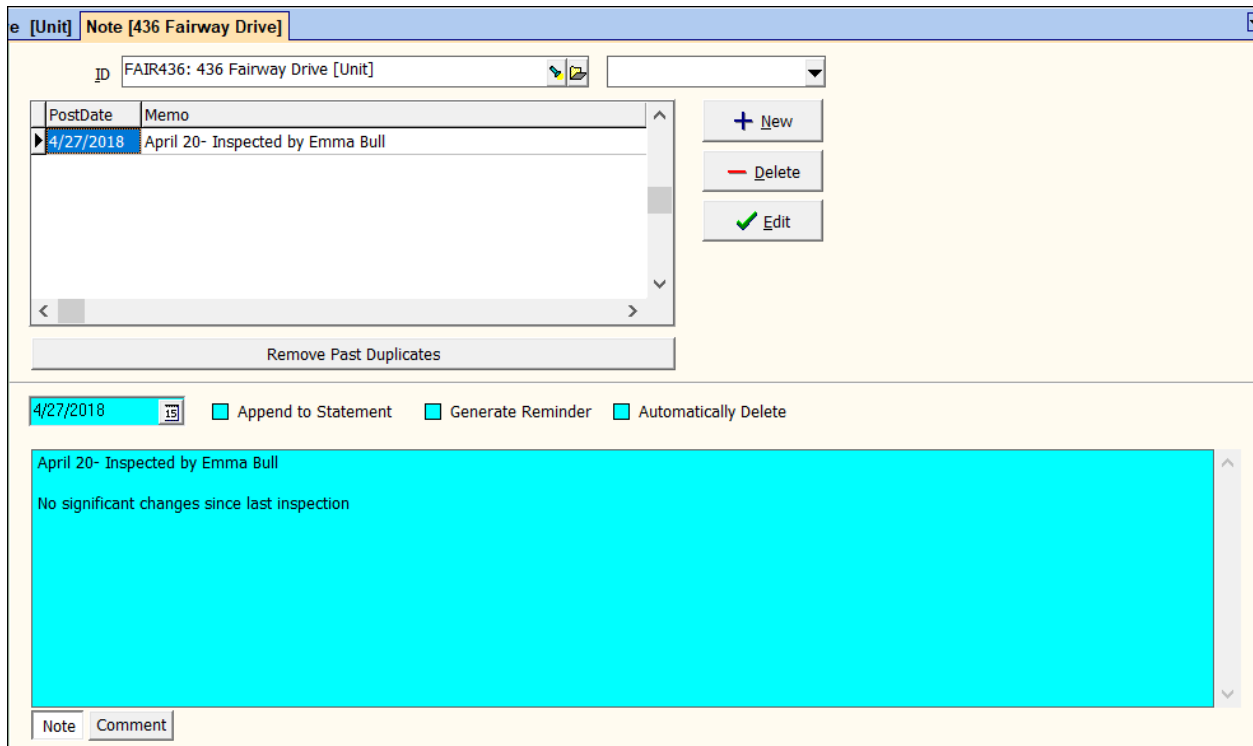
Spell check is active in the notes. Right click on the underlined word to view the list of optional spellings.

Notes can be accessed:

- using the note function in each profile
- clicking on Profiles, Event Reminders
- setting the Show Event Reminders at Logon in Setup, Environment Options
- running tickler reports – only Active notes are included.

Note History

- Clicking any Note button displays the active note history screen. From there you can add a new active note, delete or edit any note, access the recurring note history screen.
- The note body of the highlighted note is displayed on the bottom portion of the note history screen.
- A button to remove past duplicate notes is available.



Adding an Active Note

Click the <New> button from the Note History screen.

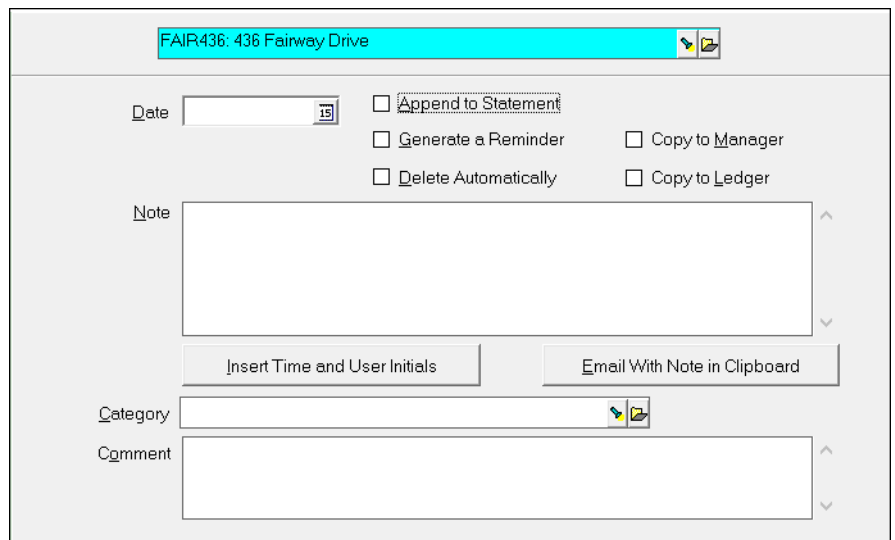
Date - Enter the effective date of the note.

Checkboxes

Append to Statement - If this checkbox is marked, the note will be included on the owner statement when you do owner statements and the note falls within the schedule date range.

Generate Reminder - If this checkbox is marked, the note activity will be included as an Event Reminder if it falls within the time frame of the reminders being displayed.

Delete Automatically - If this checkbox is marked, the note will be deleted 90 days after the date.



Copy to Unit - If this checkbox is marked, the note will be copied to the Unit Profile.

Copy to Manager - If this checkbox is marked, the note will be copied to the Property Manager profile.

Copy to Ledger - If this checkbox is marked, the note will be copied to the Owner or Property ledger. If this is a tenant note, the unit address will be inserted as the first line of the note in the ledger.

Insert Time and User Initials button - inserts the time and user initials at the position of the cursor in the Note field. It also enters today's date in the date field if it is blank. This feature facilitates keeping a running scenario of conversations with an owner or tenant.

Email with Note in Clipboard button – copies the note text to the Windows clipboard; opens up your email program; inserts the profile email address in the To field. You can use Edit, Paste or <Ctrl><V> to copy the text into the email body.

Category – assigning a category lets you run Tickler reports limited to that Note category.

Comment – this freeform field is for internal use. It is not included when the note is on a report or statement.

Adding a Recurring Note

The recurring notes are turned into active notes when the first person logs on each day. The recurring notes that are converted to notes are all those scheduled through the end of next month.

Click the Recurring Note button on the Note History menu to view the existing Recurring Notes.

To add a new one, click the New button.

The screenshot shows a software window titled "Recurring Note [436 Fairway Drive]". At the top, there is a dropdown menu showing "JD FAIR436: 436 Fairway Drive [Unit]". Below this is a table with two columns: "Next Scheduled" and "Memo". The first row shows "10/27/2018" and "April 20- Inspected by Emma Bull". To the right of the table are three buttons: "+ New", "- Delete", and "✓ Edit". Below the table are three checkboxes: "Append to Statement", "Generate Reminder", and "Automatically Delete". Under "Append to Statement", there are three fields: "Schedule" (set to "Semi-Annual"), "Next" (set to "10/27/2018"), and "Expires" (empty). To the right of these fields is a large text area containing "April 20- Inspected by Emma Bull" and "No significant changes since last inspection". At the bottom of the window, there are two tabs: "Note" and "Comment".

Schedule - Select the schedule from the drop-down list. Schedule selections include: daily, weekly, bi-weekly, four week, monthly, bi-monthly, quarterly, semi-annual, annual, bi-annual, one time, expired, never.

The screenshot shows a software window titled "Recurring Note". On the left side, there is a vertical navigation menu with buttons for "Profile Search", "Dashboard", "Internet Publishing", "Profiles", "AP", "AR", "GL", "Maintenance", "Reports", and "Mailings". The main content area displays a profile name "FAIR436: 436 Fairway Drive" in a cyan box. Below this, there are several fields and checkboxes: "Schedule" is a dropdown menu set to "One Time"; "Next Scheduled" and "Schedule Expires" are date pickers; "Note" is a large text area; "Category" is a dropdown menu; and "Comment" is another text area. To the right of these fields are three checkboxes: "Append to Statement", "Generate a Reminder", and "Delete Automatically". At the bottom of the window, there is a row of buttons: "Help", "Delete", "New", "Previous", "Next", "Save", and "Close".

Next Scheduled - This date field contains the date for the first or next date the note is eligible to be turned into an Active note. This field is updated based on the system date. Thus, once the note is made Active, a new next scheduled date is computed based on the schedule.

Schedule Expires - This date field contains the last day for display of the note.
Note - This freeform field contains the note contents.

Checkboxes

Append to Statement - If this checkbox is marked, the note will be included on the owner statement when you do owner statements and the note falls within the schedule date range.

Generate Reminder - If this checkbox is marked, the note activity will be included as an Event Reminder if it falls within the time frame of the reminders being displayed.

Delete Automatically - If this checkbox is marked and it is a reminder, it will be deleted 90 days after the date. If Append to Statement, it will be deleted on March 1 of the following year.

Insert Time and User Initials button - inserts the time and user initials at the position of the cursor in the Note field. This feature facilitates keeping a running scenario of conversations with an owner or tenant.

Email with Note in Clipboard button – copies the note text to the Windows clipboard; opens up your email program; inserts the profile email address in the To field. You can use Edit, Paste or <Ctrl><V> to copy the text into the email body.

Category – assigning a category lets you run Tickler reports limited to that Note category.

Comment – this freeform field is for internal use. It is not included when the note is on a report or statement.

The recurring notes marked as **Generate a Reminder** and **Append to Statement** are turned into active notes when the first person logs on each day. The recurring notes that are converted to notes are all those scheduled through the end of next month. Those not marked as Generate a Reminder or Append to Statement will not be turned into active notes.

To have event reminders display at logon

- Go to <<Setup, Environment Options, Logon and Printer tab>>.
- Mark the Display Event Reminders checkbox.
- Click Save.

Delete a Note

A note can be deleted using the <Delete> button.