



How to do a Global Change of Property Manager

Overview

In REST, you have the ability to do a global change to change a portfolio from one manager type to another.

This document will cover changing a Property Manager that you would like to allocate an existing portfolio and maintenance tasks in REST to another Property Manager / User.

Steps

1. Do a backup of your data. Rename the backup i.e. beforePMchange.dat.zip
2. Go to Files > User and add in the new User/Manager details (see document “Adding a New User in REST”)
3. Ensuring you have the highest security level access in REST, access the ‘Global Changes’ Menu via Other > Utilities > Global Changes. REST will now prompt you to run a backup, click OK if you have completed the backup.
4. Click on Move Portfolio Tab

Global changes

Move Portfolio | Inspections | GST settings | Miscellaneous | Fees and charges | Action/Diary | Bulk Status Update

Global changes

Global change type

Old date New date

Changes to creditors

Set all creditors to the following setting

GST exempt

"GST on credits" for commercial tenants

Clear "GST on credits" if GST start date not specified

Review/update doubtful "GST on credits" for commercial tenants. NB: May not report all incorrect "GST on credits".

5. Tick Change Property Manager (or select other Manager if required)

Global changes

GST settings | Miscellaneous | Fees and charges | Action/Diary | Bulk Status Update

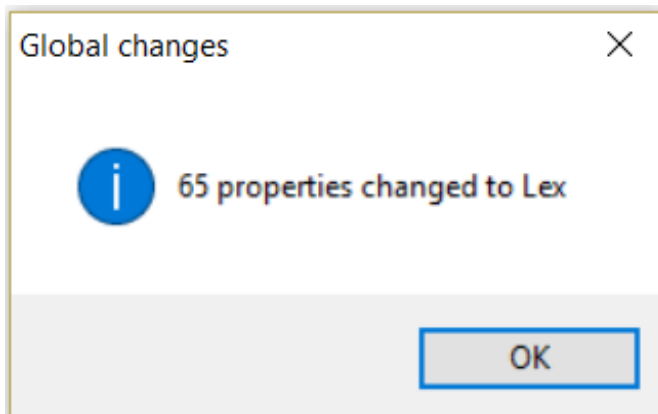
Move Portfolio | Inspections

Select the User to change from and to then click Change.

	from	to
<input checked="" type="checkbox"/> Change Property Manager	Clark (CK)	Lex (LX)
<input type="checkbox"/> Change Inspecting Agent		
<input type="checkbox"/> Change BDM		
<input type="checkbox"/> Change Repairs		
<input type="checkbox"/> Change Lett Clerk		
<input type="checkbox"/> Change Advertising Contact		
<input type="checkbox"/> Change Listing Salesperson		
<input type="checkbox"/> Change Selling Salesperson		
<input type="checkbox"/> Change Diary Items		
<input type="checkbox"/> Change Maintenance Jobs		

- From– Select the Property Manager that is currently assigned the portfolio

- To – Select the New Property Manager
6. Click Change
 7. Click OK when prompted “The selected portfolios will be changed, do you want to continue?”
 8. REST will now display a summary of the amount of properties and/or diary items allocated to the new Property Manager.



9. Ensure all users are then logged out of REST, then conduct a System Recovery via Other > System Recovery.
10. Go to Files > User
11. Click on SEARCH F7 and locate the old User/Manager. You can now change this user to Inactive if required

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