![rockend logo] The leader in property software

✉

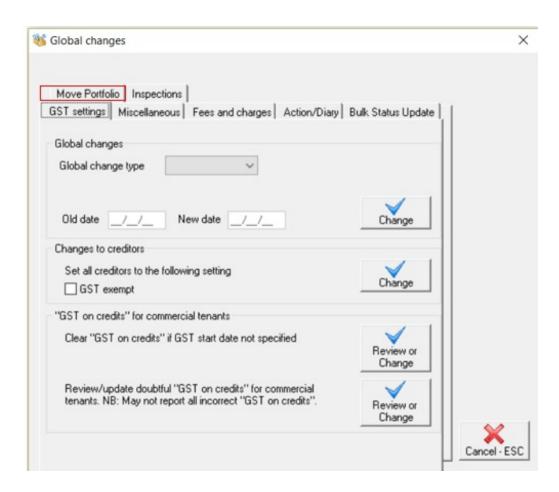# How to do a Global Change of Property Manager

Overview

In REST, you have the ability to do a global change to change a portfolio from one manager type to another.
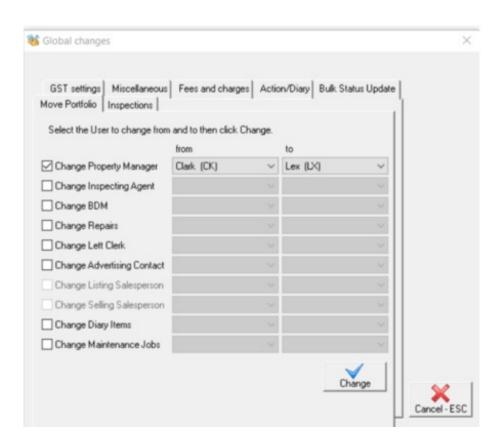
This document will cover changing a Property Manager that you would like to allocate an existing portfolio and maintenance tasks in REST to another Property Manager / User.

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.
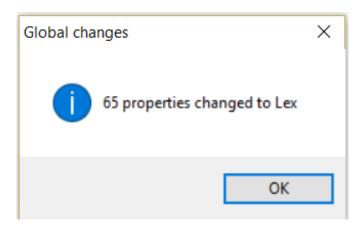
4. Click on Move Portfolio Tab

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

• 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

06/12/2017 8:31 am AEDT