New and Lost Management Reports

From version 10.0 the New / Lost Management Report available from Reports > Management > New / Lost Management Report has been modified so that lost managements are now calculated using the Management Lost Date. Previously the report used the property's inactive/archive date to report lost managements, which in most cases meant in REST the property was reported lost the month after it was actually lost.

To ensure your New / Lost Report Management Report displays the correct properties you must set the Management Lost Date on each lost property.

To set a property as lost:

1. Click Files > Property and search for and display the lost property
2. Enter the date the property was lost in the Management Lost Date field
3. Click OK

To assist with the transition two modifications have been made:

Entering past Management Lost Dates post Files Update

When a Management Lost Date is entered in the past the historical New / Lost Management Report is now updated.

For example: if today (25/11/12) the Management Lost Date 15/10/12 was entered on a property, that property would display as lost on your New / Lost Management Report for October 2012.

Properties set with a historical management lost date that is also the date a Files Update was processed, will display as lost in the month being closed.

For example: If Files Update was run on the 31/08/12 to close August 2012 a property set today with the past management lost date of the 31/08/12 will display as lost in August 2012.

Note: The following scenarios remain unchanged.

- If a property is set with the Management Lost Date on the 31/08/12 with the date 31/08/12 and then Files Update is run on the 31/08/12 to close August 2012, the property will display lost in August.
- If Files Update is run on the 31/08/12 to close August 2012, and then a property is set with the Management Lost Date on the 31/08/12 with the date 31/08/12, the property will display lost in September.

Reprinting Historical New / Lost Management Report by Archived Date

To assist with the transition to using the Management Lost Date, you can run the New / Lost Management Report by Archived date from Reports > Other > New / Lost Management Report – Old Version.

The New / Lost Management Report – Old Version displays properties lost by their archive date. This report

can be used to reprint historical reports where your lost properties were reported by archived date.

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