

Inactive Users

REST Professional version 11.5 introduced Active and Inactive status to User Details. All Users are set to Active in the version 11.5 upgrade.

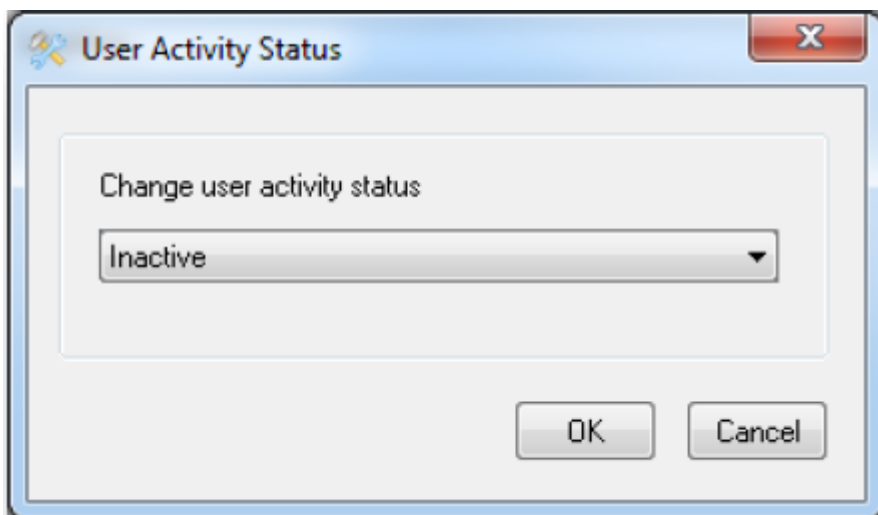
Users can be set as inactive at any time, if the user is a Property Manager, Web Advertising Contact, has incomplete diary items, Property Maintenance Jobs or is a Salesperson the ability to move the portfolios to another User is available. Moving an Other Managers portfolio can be completed using Global changes.

Inactive Status

It is recommended that users are setup as inactive after a files update and a backup is processed before the status change.

To set a User as Inactive:

1. Select Files > User.
2. Click Search - F7.
3. Search for and display the appropriate User.
4. Click the Active button. The User Activity Status screen displays.
5. Select Inactive from the drop down list.



6. Click OK on User Details, the Active button becomes Inactive.
7. Click OK - F12 to save the User as Inactive. A message displays confirming the change of status.
8. Click Yes. The Move User Portfolio screen displays.

The Move User Portfolio screen displays when the user being set as inactive is:

- Assigned as a Property Manager against Properties.
- A Job Manager against Property Maintenance Jobs.
- The Assigned to against Incomplete Diary Items.
- A Web Advertising Contact against Properties or Sales.

- Is a Listing or Selling Salesperson against Active Sales.

The image shows two side-by-side dialog boxes titled "Move User Portfolio".

The left dialog box is for Lex's portfolio. It contains three dropdown menus: "Property Manager" (Clark (CK)), "Advertising Contact" (Clark (CK)), and "Incomplete Diary Items" (Clark (CK)).

The right dialog box is for James's portfolio. It contains three dropdown menus: "Incomplete Diary Items" (Lois (LL)), "Listing Salesperson" (Lois (LL)), and "Selling Salesperson" (Lois (LL)).

Both dialog boxes have "OK" and "Cancel" buttons at the bottom.

9. Select the User to move each Portfolio to from the drop down lists.

- Properties and Maintenance Jobs can be moved to active Property Managers.
- Incomplete Diary items can be assigned to another active users. The user remains as the Assigned To on complete diary items.
- Property and Sale Web Advertising Contacts can be assigned to Active Users set as Web Advertising Contacts.
- Listing and Selling Salespeople can remain assigned to the inactive User or assigned to another active Salesperson.

10. Click OK, a message displays confirming your selection.

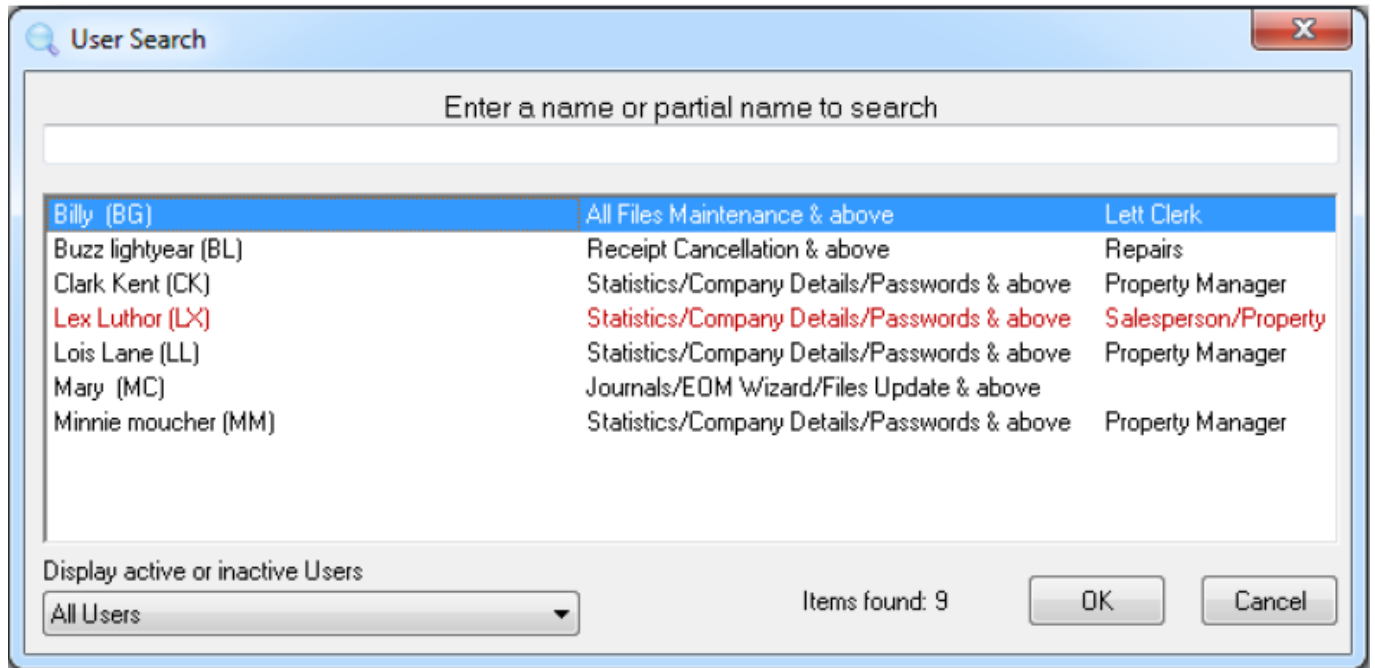
11. Click OK. The portfolios are moved, the user's password is removed and the user is set as Inactive.

Inactive Users

After a User has been made Inactive in REST you will be able to search, report and reactivate their status to Active if required. Inactive Users assigned to Diary Items or Sales display in red.

To display an Inactive User:

1. Select Files > User.
2. Click Search - F7.
3. Select All Users from the Display active or inactive Users drop down list. Inactive Users display in red.



4. Select the Inactive User.
5. Click OK. The Inactive User displays.

Reporting with Inactive Users

Property and Other Managers

When a Manager is marked as inactive you can only report by manager for the months that Manager was active. For example if Clark was a property manager assigned to properties in January, February and March and his status was set as Inactive in April.

- You would be able to view reports by Manager Clark in January, February and March.

Selection		Advanced	
Month to Print	January ▼ 2010 ▼	Manager	Clark (CK) - PM ▼

- You wouldn't be able to view reports by Manager Clark in April.

Selection		Advanced	
Month to Print	April ▼	2010 ▼	Manager
			All ▼
			All
			Billy (BG) - Lett Clerk
			Buzz (BL) - Repairs
			Lois (LL) - PM
			(UNALLOCATED)

Diary List

When a user is made inactive, incomplete Diary items are moved to the selected user. Completed Diary items remain Assigned to the Inactive User.

To display an Inactive User's Completed Diary Items:

- Select Other > Diary List
- Select the Include Completed checkbox
- Select the Another User radio button.
- Select the Incl Inactive checkbox.
- Select the Inactive User from the drop down list.
- Select the Period required
- Click Refresh

Start Date/Time	Type	Assigned to	Subject	File Type	Alpha
26/01/2014 09:00 AM	File Note	Clark Kent	Meet Carrie Bradshaw at 25 Lavender St at 10am	Owner	BRADSHAW
25/01/2014 09:00 AM	File Note	Clark Kent	Called and spoke to Carrie Bradshaw. I have advise	Owner	BRADSHAW
25/01/2014 09:00 AM	Maintenance	Clark Kent	Repair broken shower rose in main bathroom COMPLE	Property	MANN32
25/01/2014 09:00 AM	File Note	Clark Kent	Tenant refund - LOCKLEAR 15/01/10 - 21/01/10 Rent	Tenant	LOCKLEAR

Selection Criteria	
<input type="checkbox"/> Actions required only <input checked="" type="checkbox"/> Include completed	File File type: All <input type="checkbox"/> All Alpha: <input type="text"/> <input type="text"/>
Assigned to <input type="radio"/> All <input type="radio"/> Only yours <input type="radio"/> For others by you <input checked="" type="radio"/> Another user <input checked="" type="checkbox"/> Incl Inactive <input type="radio"/> Manager Clark Kent (CK)	Include related <input type="checkbox"/> Owners <input type="checkbox"/> Properties <input type="checkbox"/> Tenants <input type="checkbox"/> Buildings <input type="checkbox"/> Holiday Bookings
Period <input checked="" type="radio"/> All <input type="radio"/> 1 day <input type="radio"/> 1 week <input type="radio"/> 1 month <input type="radio"/> 3 months <input type="radio"/> Select From: 01/01/1900 To: 31/12/2999	

Salespeople

You can only individually report by active Salespeople, to report on Sales that are assigned Inactive Salespeople select All in the Salesperson report option.

Selection	Advanced																				
Month to Print: Current	Group: <input type="text"/>																				
<input checked="" type="radio"/> All <input type="radio"/> Range Start at Alpha Index: <input type="text"/> Finish at Alpha Index: <input type="text"/> <input type="radio"/> Select: <input type="text"/>	Status: All Salesperson: All																				
	<table border="1"> <thead> <tr> <th></th> <th>From Date</th> <th>To Date</th> <th>None</th> <th>Sort By Date</th> </tr> </thead> <tbody> <tr> <td>Follow up</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Settlement</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Exchange</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>		From Date	To Date	None	Sort By Date	Follow up	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Settlement	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Exchange	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Exchange	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>																	
	Incl. Completed/Fallen Over: <input type="checkbox"/>																				

Global Changes

The Global Changes has been enhanced to now allow changes to Web Advertising Contact, Incomplete Diary Items, Property Maintenance Jobs and Listing and Selling Salespeople in addition to the existing options for Property and Other Managers.

You must have the highest REST security level (Statistics/Company Details/Passwords & Above) to process a Global Change. It is recommended that a backup is completed of your REST database before processing a global change.

To process a Global Change:

1. Select Other > Utilities > Global Changes.
2. Click OK to confirm a current backup has been processed. Backups can be processed from File >

Archive > Backup.

3. Click the Move Portfolio tab.

The screenshot shows a software window titled "Global changes" with a close button in the top right corner. Below the title bar is a tabbed interface with five tabs: "GST settings", "Miscellaneous", "Fees and charges", "Action/Diary", and "Bulk Status Update". The "Move Portfolio" tab is selected and active. Below the tabs, there is a text instruction: "Select the User to change from and to then click Change." Below this instruction is a table with two columns, "from" and "to", and a list of eight items, each with a checkbox to its left. The items are: "Change Property Manager", "Change BDO", "Change Repairs", "Change Lett Clerk", "Change Advertising Contact", "Change Listing Salesperson", "Change Selling Salesperson", and "Change Maintenance Jobs". Each item has a corresponding row in the table with a dropdown menu under the "from" column and another dropdown menu under the "to" column. At the bottom right of the dialog box, there are two buttons: a "Change" button with a checkmark icon and a "Cancel - ESC" button with a red X icon.

	from	to
<input type="checkbox"/> Change Property Manager		
<input type="checkbox"/> Change BDO		
<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		

4. Select the checkbox against the types you would like to globally change.

5. Select a User to move the From and To.

6. Click the Change button, a confirmation message displays.

7. Click OK, a message displays detailing the portfolios that have been moved.

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