

How to Create New Manager types in REST Professional

Overview

This document covers setting up Manager Types in REST. REST allows up to five types of Managers to be associated with a property. The Property Manager and the Inspecting Agent are already setup as default.

You can allocate additional managers type to a property. You may name these additional managers as applicable i.e. 'Assistant PM' or 'Leasing Officer' etc. You can then run property and tenant reports for these managers in the same way you would for existing property managers.

NOTE: From version 12.5+ an "Inspecting Agent" has been added as default to use with new inspection features and cannot be deleted. If a previous Manager type has been set up for an inspecting officer/agent this can now be removed.

This document will cover:

- How to Setup a New Manager Type
- How to Allocate a Manager Type to a User
- How to Link a Manager to a Property

How to Setup a New Manager Type

1. Go to Other > Utilities > System Options and click on Descriptions
2. In other Manager types enter a new manager type/description. There is space for up to three different types

System Options

Sales | Other | SMTP | System | **Other Payments** | Mobile

Transactions | Statements | **Statement/Report** | **Miscellaneous** | Descriptions | Reminders

Default descriptions

Management fee description	Management Fees
Supervision fee description	Supervision Fees
Bank charges description	Bank Charges
Disbursement fee description	Disbursement Fees
BAD taxation	BAD Taxation
Postage and sundries	Administration Fee
Owner one off fees	Income & Expenditure

Data Source

Database Descriptor	Advanced Commercial
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Other Manager Types

Manager Type 2	Assistant PM
Manager Type 3	Repairs
Manager Type 4	Referral

Tenant Invoice Description: TAX INVOICE

Cancel - ESC

OK - F12

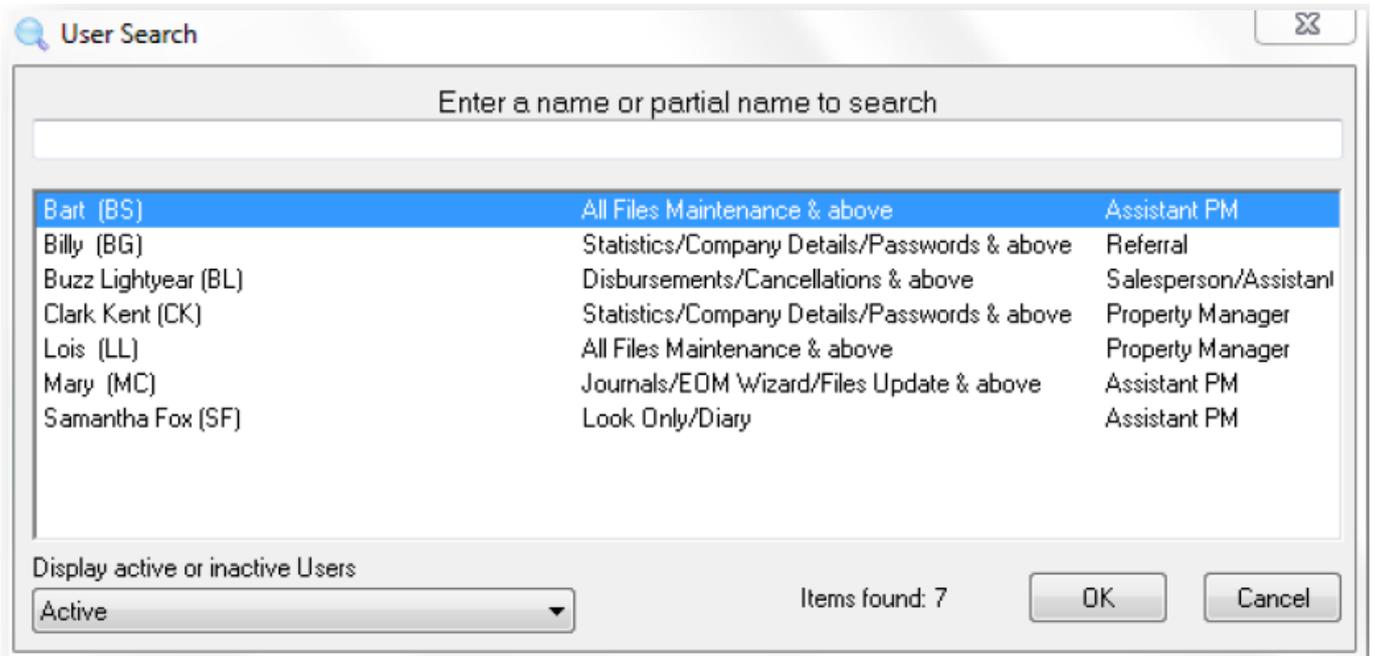


The characters that you can enter is limited to 12 so abbreviate where possible

3. Click OK-F12

How to Allocate a Manager Type to a User

1. Go to Files > User/Password and click on Search-F7 and select a User



2. Ensure that 'Property Manager' is unticked. This will allow you to select the newly created 'Other manager' types from the drop down list.

User Details

Initials

First Name Last Name

Full name

General | **User Profile** | Login Options

Password

Security Level

System

Sales

Property Manager

Other Manager

Salesperson

Sensitive Change Notification

Web Advertising Contact

Domain ContactID

Outlook Synchronisation

Sync REST Contacts for

Sync REST Diary

Cancel - ESC

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

OK - F12

How to Link a Manager to a Property

1. Select Files > Property
2. Type in the property alpha and press Enter
3. On the General Tab you will find the information relating to Managers. Underneath Property Manager and Inspecting Agent you will find Other Manager types added
4. Click on the drop down menu and select the manager's name from the list.
5. Click OK-F12 to save

Property Details

Alpha index: ARCH34 Active

Address: 34 Archer Street

Suburb: CHATSWOOD State: NSW P/Code: 2067

Reminders | Gained/Lost | Maintenance | Inspections | Other

General | Financial | Advert | Notes | Tenants | Commercial | Strata | Holiday | Insurance | Reg. Payments

Owner: FIRTH Colin Firth
95 Florida Road
PALM BEACH NSW 2108
H:(02) 9958 7458 W:(02) 9238 5478
[Go to owner](#)

Category

Class: Commercial

Reporting order: 1

Key #: 25 [Search for key](#)

Alarm Code:

Area code: Chatswood

Property manager: Clark (CK)

Inspecting Agent: Clark (CK)

Assistant PM: Samantha (SF)

Repairs: No Manager

Referral: No Manager

Cancel - ESC

Action - F1

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

Last Edits - F9

OK - F12

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