Adding an Active/Inactive Status in REST Professional

Overview

In REST Owners Properties and Tenants can be marked as Casual Letting or Prospects by creating an inactive status in REST.

This marks the Masterfile as inactive so that it does not appear on various reports (ie/ rent arrears and management report figures etc), however still allows you to do reports based on that particular inactive status and also mail merge to the inactive status owners.

Steps

1. Go to Files > Descriptors and Comments > Active/Inactive Status
2. Click on Add Mode – F4 and type the name of the new inactive status you require in the Status type field
3. Click on OK – F12 to save the category
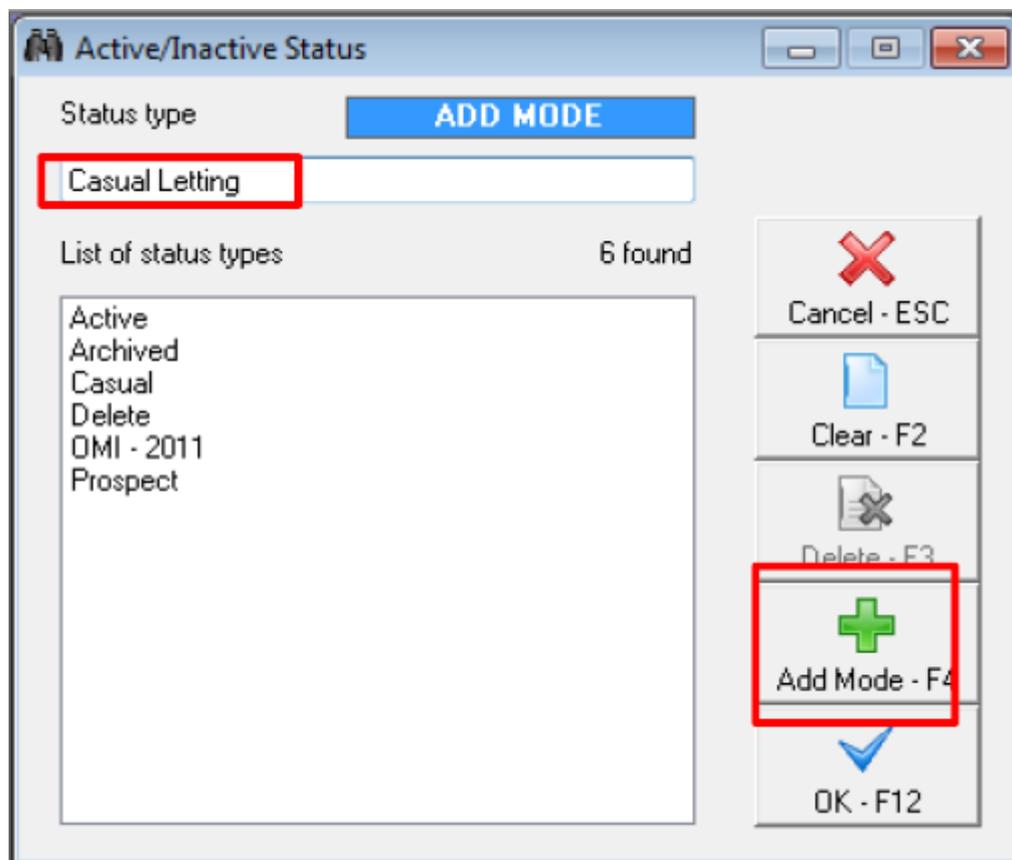
Example of Creating a Casual Letting Owner Card

1. Go to Files > Owner and click on ADD MODE F4
2. Change the Active status to the newly created status 'Casual Letting'
3. Complete the Owner Details and click OK F12

Example of Creating a Casual Letting Property Card

1. Go to Files > Property > Gained/Lost Tab > Property Status
2. Change the Active status to the newly created status 'Casual Letting'
3. Complete the Property Details and Click OK – F12

NOTE: The example above shows the Property details, however you can mark Tenants and Owners with these Inactive Statuses also.

Troubleshooting

- You can only mark a tenant, property or owner with an inactive status when there are no active transactions in the current period
- All property maintenance jobs must be cleared against your property before making the change
- You cannot have an Active tenant against the property you wish to change
- You cannot have an Active property against the owner you wish to change
- If changing an owner you must have a zero balance

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