

Adding an Active/Inactive Status in REST Professional

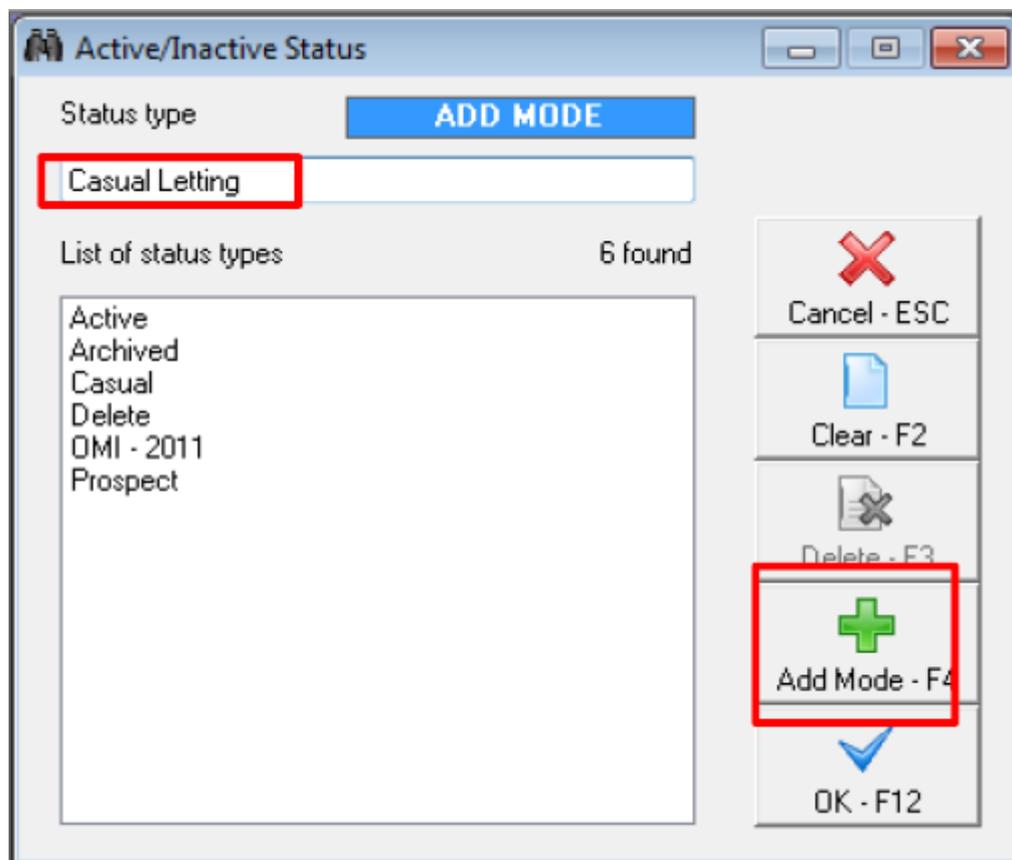
Overview

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

The screenshot shows the 'Owner Details' window with the following fields and options:

- Alpha index: JONES1
- ADD MODE button
- Casual Letting (highlighted in red)
- Name: Mr Bob Jones
- General | Payment | Notes | Enquiry | Properties | O/S Disbs | Budget | Tax & Charges tabs
- Address: 25 Gladesville Tce, COOGEE BEACH NSW 2034
- Contact section:
 - Salutation: Bob
 - Home: 085558708
 - Work: [empty]
 - Fax: [empty]
 - Mobile: [empty]
 - E-mail: bobjones@bigpond.com
- Split payments section:
 - % amount retained: 100
 - Balance to owner: [empty]
- Right-hand sidebar with buttons:
 - Cancel - ESC
 - Action - F1
 - Clear - F2
 - Delete - F3
 - Add Mode - F4
 - Search - F7
 - Last Edits - F9
 - 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

Property Details

Alpha index: BEACH96 Casual Letting

Address: 96 Beach Street

Suburb: COOGEE BEACH State: NSW P/Code: 2034

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

Reminders | Gained/Lost | Other

Gained and Lost Information

Property Status: Casual Letting

Gained: Casual Letting Lost

Authority Start Date: 09/09/05 Authority Expiry Date: _/_/_

Management Gained Date: _/_/_ Management Lost date: _/_/_

Gained Reason: No reason specified Lost Reason: No reason specified

Gained Comment: Lost Comment:

Referred By: Not referred Lost to Competitor: Not lost to competitor

Referral Comment:

Cancel - ESC
Action - F1
Clear - F2
Delete - F3
Add Mode - F4
Search - F7
Last Edts - F9
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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