

How to Setup and Use the Portfolio Check

Overview

Portfolio Checker displays a list of diary items and tasks that are due for individual property managers. The portfolio checks for tasks associated with the properties belonging to those property managers.

The Portfolio Check loads on start up when the Property manager first logs into Rest for the day however can be accessed in time through menu options.

This Document will cover:

- [How to Setup Portfolio Check for a Property Manager](#)
- [How to Use the Portfolio Check](#)
- [How to Change the Portfolio Check Settings](#)

How to Setup Portfolio Check for a Property Manager

To make changes or edit settings to a Property Manager's User/Password you must have the highest level of security in Rest.

- Go to Files > User
- Click on Search-F7 and select the Property Manager and click OK
- Click on the User Profile Tab > Ensure that the Property Manager tick box is ticked
- Click on the Login Options Tab > Tick all options Property Manager requires for tasks and diary items
- Select them option to 'Display Portfolio Check on Login' if required
- Click OK-F12

User Details
✕

Initials Active

First Name Last Name

Full name

General
User Profile
Login Options
Portfolio Access

Portfolio Check

Display Portfolio Check on Login

Diary

Personal Diary Sale Diary

Linked Diary Items Commercial Diary

Tenancy Tasks

Arrears Lease expiry

Rent review

Property Tasks

Vacancy Property Information Authority Expiry

Inspections Property Reminders

Property Maintenance Insurance

Activity List

Display Activity List on Login Auto Update with Recent Functions

✖
Cancel - ESC

📄
Clear - F2

🗑️
Delete - F3

+
Add Mode - F4

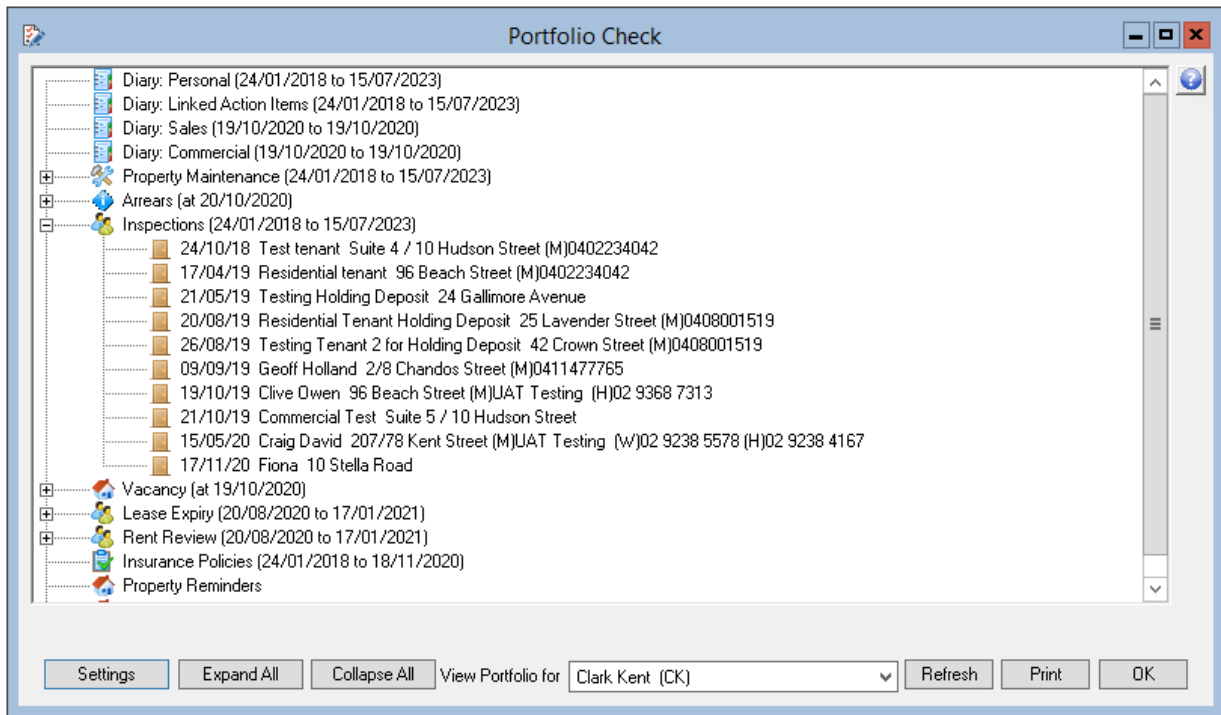
🔍
Search - F7

✓
OK - F12

How to Use the Portfolio Check

If the Option to 'Display Portfolio Check on Login' has been setup in the User Details, the Portfolio Check will automatically generate upon logging in to Rest for the first time of the day, otherwise this can be access through the Other menu or via the Portfolio Check Icon.

- Go to Other > Portfolio Check or click on the Portfolio Check Icon
- Click on the + symbol to preview the tasks and diary items or click on Expand All at the bottom of the screen
- Click on Print to either Print, Preview or Email the Portfolio check in an easy read view



The Portfolio Check can also be configured with Alert settings. See the following steps to set up Alert Settings.

How to Change the Portfolio Check Settings

You can access the Portfolio Check Settings by clicking on the Settings button at the bottom on the Portfolio Check screen, otherwise it can be accessed through Company Details.

Note: You must have the highest security level in Rest to make these changes.

- Go to Other > Utilities > Company Details
- Click on the Defaults tab
- Click on Portfolio Checker Edit button
- Edit the alert settings you would like for each task and diary items
- Click Save

Portfolio Check Configuration
X

Portfolio Check Configuration

Portfolio Checker Alert Settings

These settings affect when alerts appear in the Portfolio Checker for incomplete events.

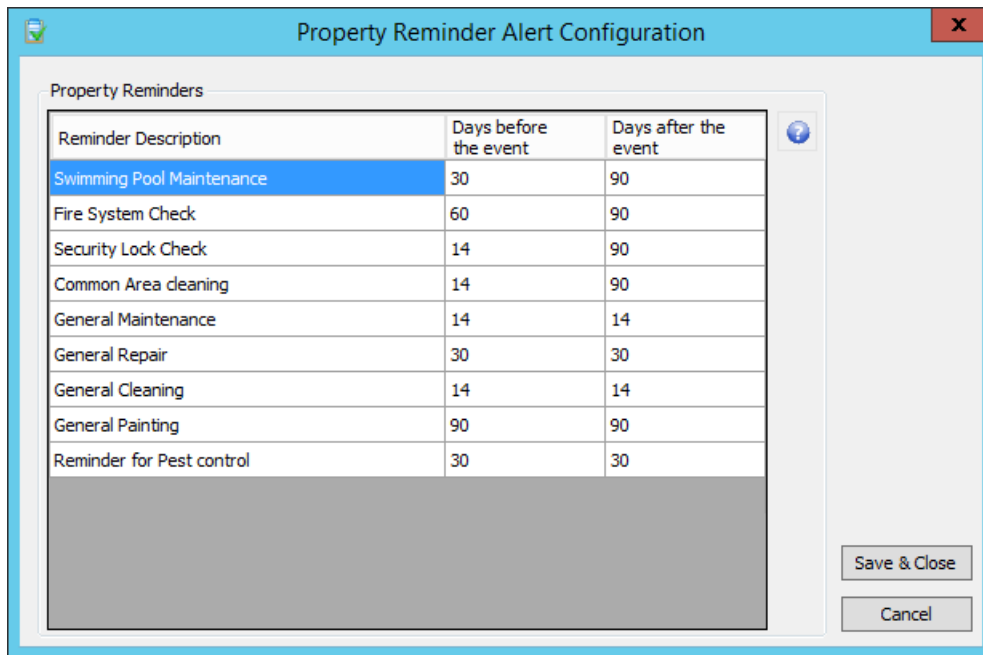
If the right hand column is left blank, the alert will continue to show for up to two years after an incomplete event is due.

| Portfolio Item | Start alert | Continue alert until |
|--|--|--|
| Personal Diary | <input type="text" value="999"/> days before the event | <input type="text" value="999"/> days after the event |
| Linked Diary Items | <input type="text" value="999"/> days before the event | <input type="text" value="999"/> days after the event |
| Property maintenance | <input type="text" value="999"/> days before the event | <input type="text" value="999"/> days after the event |
| Inspections | <input type="text" value="999"/> days before the event | <input type="text" value="999"/> days after the event |
| Arrears will display for all tenants | | <input type="text" value="0"/> days or more in arrears |
| Display vacant properties and properties vacating up to | | <input type="text" value="0"/> days in the future |
| Lease Expiry | <input type="text" value="90"/> days before the event | <input type="text" value="60"/> days before the event |
| Rent Review | <input type="text" value="90"/> days before the event | <input type="text" value="60"/> days after the event |
| Insurances | <input type="text" value="30"/> days before the event | <input type="text" value="999"/> days after the event |
| Property Reminders + | <input type="text" value="30"/> days before the event | <input type="text" value="999"/> days after the event |
| Sales Diary | <input type="text" value="0"/> days before the event | <input type="text" value="0"/> days after the event |
| Commercial Diary | <input type="text" value="0"/> days before the event | <input type="text" value="0"/> days after the event |
| Property Information | <input type="text" value="30"/> days before the event | <input type="text" value="999"/> days after the event |
| Authority Expiry | <input type="text" value="60"/> days before the event | <input type="text" value="30"/> days before the event |

How to Configure Property Reminders in the Portfolio Check

With the introduction of unlimited Property Reminders in Version 18.5, you will now be able to customise the unlimited Property Reminders on your Portfolio Check to specific alert start and end dates, for each reminder.

- Select the Portfolio Check Icon > Click Settings
- Click the green Plus Icon next to Property Reminders to access the Property Reminder Alert Configuration



On this screen you will be able to set a specific amount of days before the event and days after the event, for the Portfolio Check to alert you for each Property Reminder.

- Select '**Save & Close**' to save your changes

If you do not set specific days before the event or days after the event, the reminder will default to the Configuration setting that was set on the Portfolio Configuration Screen.

Portfolio Check Configuration
X

Portfolio Check Configuration

Portfolio Checker Alert Settings

These settings affect when alerts appear in the Portfolio Checker for incomplete events.

If the right hand column is left blank, the alert will continue to show for up to two years after an incomplete event is due.

| Portfolio Item | Start alert | Continue alert until |
|--|--------------------------|---------------------------|
| Personal Diary | 7 days before the event | 7 days after the event |
| Linked Diary Items | 7 days before the event | 7 days after the event |
| Property maintenance | 7 days before the event | 7 days after the event |
| Inspections | 7 days before the event | 0 days after the event |
| Arrears will display for all tenants | | 0 days or more in arrears |
| Display vacant properties and properties vacating up to | | 0 days in the future |
| Lease Expiry | 60 days before the event | 30 days before the event |
| Rent Review | 60 days before the event | 30 days after the event |
| Insurances | 30 days before the event | 5 days after the event |
| Property Reminders + | 30 days before the event | 999 days after the event |
| Sales Diary | 7 days before the event | 7 days after the event |
| Commercial Diary | 0 days before the event | 0 days after the event |
| Property Information | 30 days before the event | 999 days after the event |
| Authority Expiry | 60 days before the event | 30 days before the event |

10/11/2020 9:11 am AEDT