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.

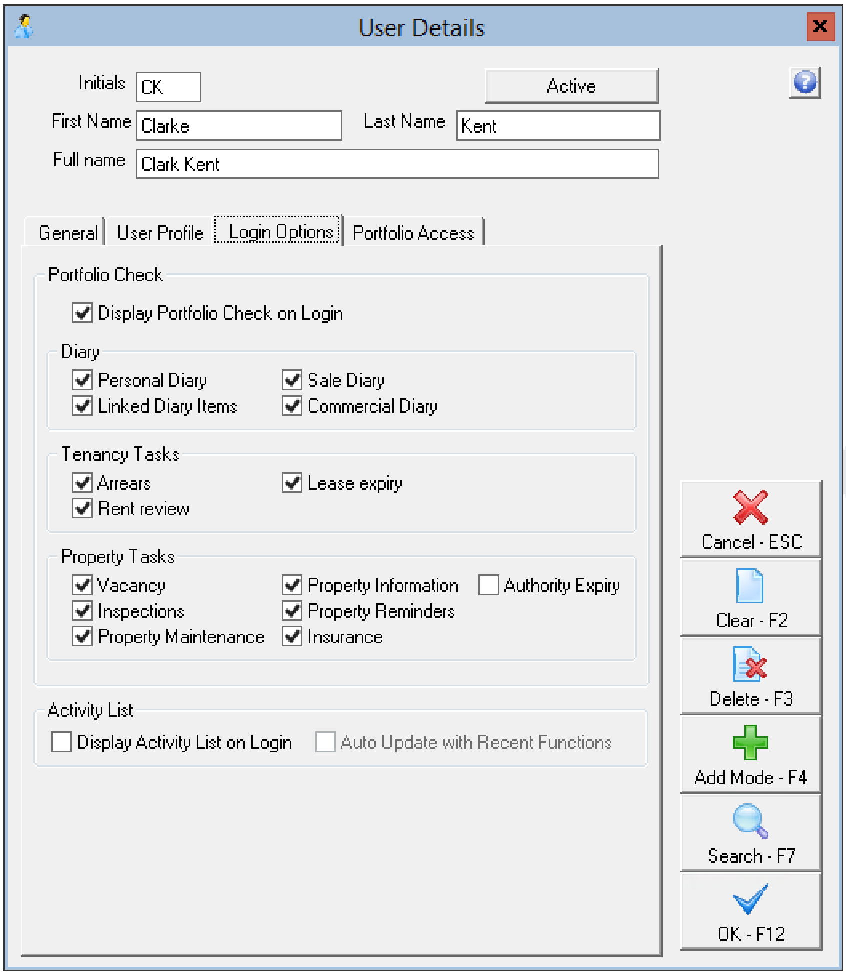
The Portfolio Check loads on start up when the Property manager first logs into Rest for the day however can be accessed in time through menu options.

This Document will cover:

How to Setup Portfolio Check for a Property Manager

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

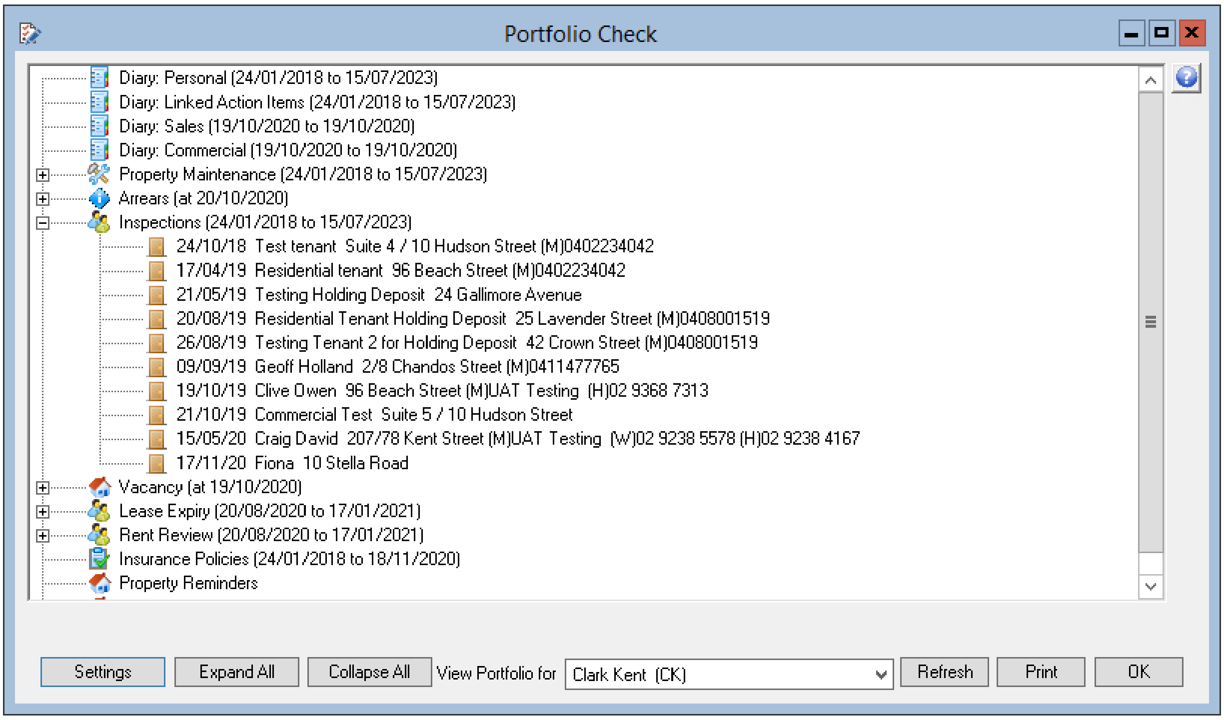
- Go to Files > User
- Click on Search-F7 and select the Property Manager and click OK
- Click on the User Profile Tab > Ensure that the Property Manager tick box is ticked
- Click on the Login Options Tab > Tick all options Property Manager requires for tasks and diary items
- Select them option to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



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



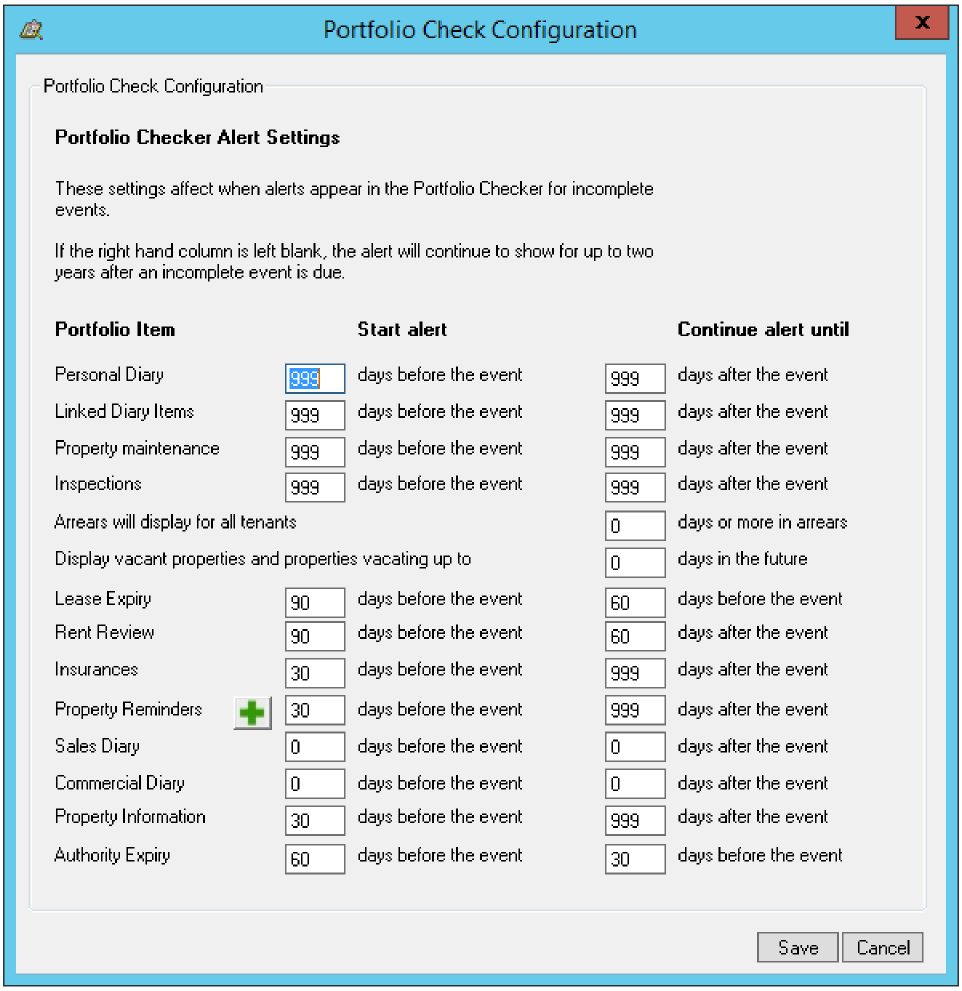
The Portfolio Check can also be configured with Alert settings. See the following steps to set up Alert Settings.

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.

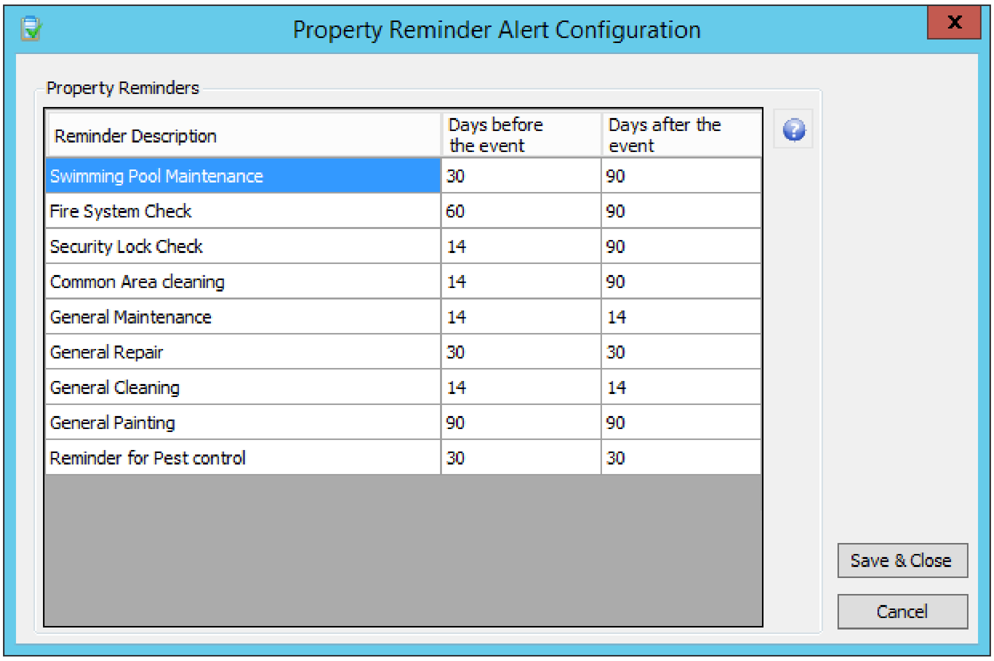
- Go to Other > Utilities > Company Details
- Click on the Defaults tab
- Click on Portfolio Checker Edit button
- Edit the alert settings you would like for each task and diary items
- Click Save



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.

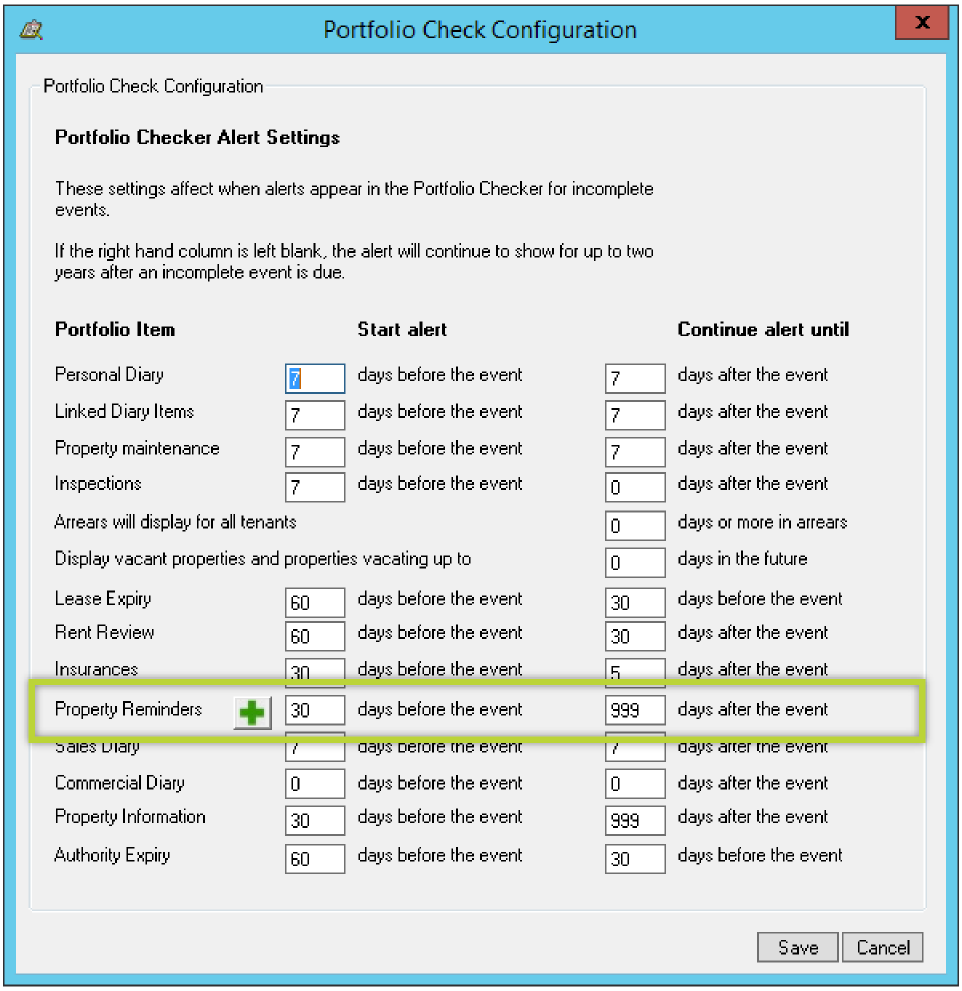
- Select the Portfolio Check Icon > Click Settings
- Click the green Plus Icon next to Property Reminders to access the Property Reminder Alert Configuration



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.



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