

How to Setup Casual Lettings in Rest Professional

Overview

There may be times when an owner engages your office to find a tenant, and the property will not be managed by your agency. These are often referred to as let only or casual lettings. For Rest Professional purposes, this would be considered a Casual Letting.

This document will cover:

- Setup Owner, Property and Tenant Cards
- Receipt and Disburse Funds
- Archiving against Casual Lettings Status

Setup Owner, Property and Tenant Cards

You will be required to setup Owner, Property and Tenant Cards as you would normally for a New Management. For further information, please see the following documents:

- **[How to Add a New Owner Card in Rest](#)**
- **[How to Add a New Property Card in Rest](#)**
- **[How to Add a New Tenant Card in Rest](#)**

NOTE: Ensure when setting up these cards that no fees are charged on the owner and property cards and no inspection dates are set on the tenant.

Receipt and Disburse Funds

1. Receipt the move in costs i.e. rent and bond monies as usual. For further information, please see document **[How to Receipt in Rest.](#)**
2. Disburse the bond monies to the bond board or owner as required. For further information please see document **[How to Process a Bond Disbursement in Rest.](#)**
3. Charge any fees to the Owner i.e. letting fees, inspection fees as usual
4. Payout the Owner (if applicable) as a One Off Owner Payment or this will happen as part of the end of month process.
5. Enter a vacate date against the tenant. This will avoid the tenant appearing on arrears reports prior to archiving the tenant card. We recommend you use the paid to date as the vacate date.

Archiving Tenant, Property & Owner against Casual Letting Status

In order to archive the tenant, owner and property you must ensure there are no current transactions in the current accounting month in Rest Professional. This should be done straight after end of month.

1. Ensure you have an inactive status for **Casual Lettings** entered in Rest. Checked this by going to **Files > Descriptors and Comments > Active/Inactive Status**. If you do not have a status added, refer to the help document **Adding an Active/Inactive Status in Rest**
2. Proceed to archive your tenant, property and owner in this order:

- **Tenant - Files > Tenant > Select the Tenant > Click on Active > Mark against Casual Letting** and Click **OK-F12**

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- **Property - Files > Property > Select the Property > Gained/Lost Tab > Click on the drop down box for 'Property Status' and mark against Casual Letting** and Click **OK-F12**

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- **Owner - Files > Owner > Select the Owner > Click on Active > Mark against Casual Letting** and Click **OK-F12**

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