

How to Setup and Use the Commercial Diary in REST Professional

Overview

The commercial diary displays a list of dates, options, increase or lease information etc. for commercial properties. The diary items can be by owner, building, property or tenant for any date range. These diary items will also show in the Portfolio Checker if it is enabled.

NOTE: The commercial diary is only available with the Advanced Commercial Module.

This document will cover:

- How to View Commercial Diary in Portfolio Checker
- How to Add a Diary Action Type
- How to Add a Commercial Diary Action Note
- How to Print Commercial Diary Items

How to View Commercial Diary in Portfolio Checker

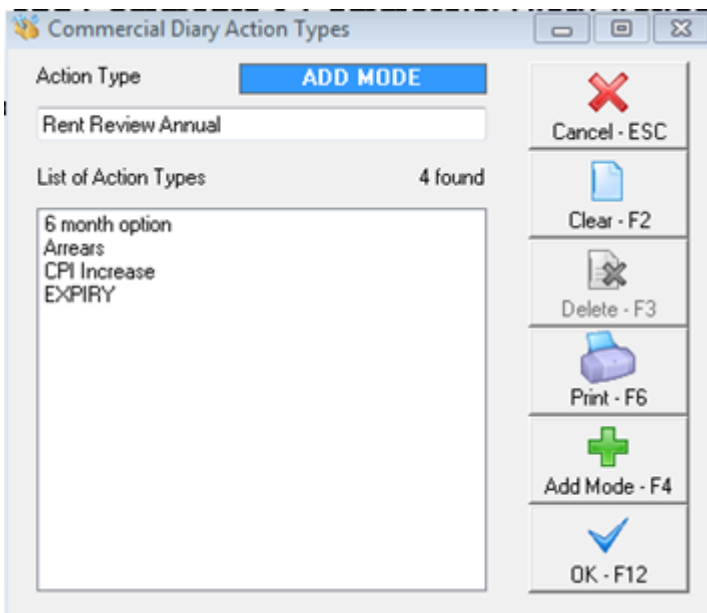
For the Commercial Diary to be displayed on a user's Portfolio Check it must be setup in their User Profile. You must have the highest form of security to be able to access User information.

1. Go to **Files > User**
2. Click on **Search-F7** and select user from the list and click **Ok**
3. Click on **Login Options** and tick **Commercial Diary** under Diary Options
4. Click **OK-F12**
5. Go to **Other > Portfolio Check**. Diary: Commercial will display. Once the user has diary items assigned they will be able to expand and view the items

How to Add Diary Action Type

You will need to add the Commercial Diary Action Types before being able to add a commercial diary item.

1. Go to **Files > Descriptors and Comments > Commercial Diary Actions**
2. Click on **Add Mode-F4**
3. Type in the **Action Type** you would like to add
4. Click **OK-F12**



How to Add a Commercial Diary Action Note

1. Go to **Files > Tenant** and enter the alpha index of the tenant and press **Enter**
2. Click on the **Commercial Tab**, then click **Commercial Diary**
3. Select from the drop down list the **Commercial action type** you wish to add against this diary action item
4. If the item you wish to add is not listed, you can simply click on **Add Action** and add a new one in
5. Select the **Due Date** for the diary item.
6. Enter any relevant **Comments** for the diary item
7. The Property Manager for the property will be selected by default as the Manager but may be

changed if required

- This will be automatically linked to the tenant, however this can be changed by clicking the drop down menu under File Type and selecting from the drop down list
- Click on **OK-F12**

The screenshot shows a 'Commercial Diary' form with the following fields and values:

- Commercial action type:** CPI Increase
- Due Date:** 17/02/2016
- Manager:** Lex Luthor (LX)
- Comments:** Enter CPI increase
- Completed:** Completed, 03/02/2016, 04:45 PM
- Created:** 03/02/2016 04:45 PM By: Clark Kent
- Linked to tenant:** Matt Damon
- File Type:** Tenant
- Alpha:** DAMDNM
- Tenant:** Matt Damon (Home phone: 9965 8788 Mobile: 0415374231)

Buttons on the right side include: Cancel - ESC, Clear - F2, Delete - F3, Duplicate - FB, Calendar, List, and OK - F12.

NOTE: A commercial diary note can also be added by going to **Other > Commercial Diary** and selecting the criteria as above. You can also choose the **File Type** to save against Owner/Property/Tenant/Building.

How to Print Commercial Diary Items

- Go to **Other > Diary List**
- In the Selection Criteria tick **Commercial Diary**
- Select the **Manager**
- Select the **Period** you wish to display
- In the **Commercial Action Type** drop down select the action you require or leave as all
- Click on **Refresh** and the list will display
- To show an Expanded view of the listed items, you can click on **Expanded View**
- To print the listed items, click on **Print > Print-F12**

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