Portfolio Check

The Portfolio Check is designed to be your 'to do' list for the day. It captures a range of tasks, many of which stay on your task list until they are completed.

Setting up the Parameters

Go to **Other** > **Portfolio Check** > **Settings**

If you would like the tasks to stay on your Portfolio Check until they are marked as completed, make sure you keep the parameter set to 999 days after the event.

⚠️ Check with your administrator before making any changes. The parameters are set for the office, and not per individual.

Set up Individual Users

Go to **Files** > **User** and **search for the user you are setting up**

1. On the Login Options tab select the checkboxes for the specific tasks of that manager.

2. Select **Display Portfolio Check on Login** so that Portfolio Check displays when the user logs in.

Actions – To Do Items and Reminders

The Personal & Linked Action Items on your Portfolio Check come from entries in your personal diary or from Action/Diary entries marked as 'action required' which have been linked to an owners, property or tenant file.

You can use the REST Microsoft Outlook synchronisation function to transfer all of your tasks over to your MS Outlook.

Other > **Outlook Synchronisation**

When you have completed the required action:

1. Go back into the diary entry in REST Professional

2. Uncheck '**Action Required**'

3. Click **OK**

The action will automatically be marked as completed. It will be saved and removed from the Portfolio Check.

Spring Clean your Portfolio

Action & Conversation Diary

Other > Diary List

1. Go through the list and complete any actions that need completing.

2. Reschedule or finalise those actions that you may have forgotten about.

Property Maintenance

Files > Property Maintenance Job > Job List – F7

Review the jobs on this report. Once you have marked the jobs as **Completed** or **Rejected** in the property maintenance status, they will no longer be seen on your Portfolio Check.

Inspections

Reports > Tenant > Inspection Report

1. Select **All**

2. Select the Report Range option '**Without Dates**'

If a property appears on this list, it means that there is no date for an inspection in the tenants' file.

Run the same report, selecting ' **With Dates**' at the Report Range, for those properties with dates and make sure that you reschedule any inspections that are overdue.

Lease Expiries

Reports > Tenant > Tenant Lease Dates Report

1. Select **All**

2. Select Lease Date option '**Lease Expiry**'

3. Don't enter any dates

4. Select the **Date Order** checkbox

5. Review Leases as required

Run the report again, select the '**None**' checkbox at the Date Range option to view tenants with no lease expiry.

Rent Reviews

Reports > Tenant > Rent Review Report

1. Select All

2. Select the Date Order checkbox

3. Review as required

Run the report again, select 'Without Dates' at the Report Range option to view tenants with no rent review date.

Insurance Policies

You can attach information about each properties' insurance policy by going to **Files > Insurance Policy**, select **Add Mode – F4** to enter in a new insurance policy.

Should you require assistance please visit the Rockend Knowledgebase or contact Rockend Support on 1300 657 700