PALACE

Setting up Custom Views

Custom Views have a couple of purposes. 1) to allow you to see any information in a quick view

2) This is where bulk mail merges are run from

Go to the Owner, Property or Tenant area depending on what custom view you are setting up.

We will use a fixed term tenancy view as an example.

Click on Tenancy, then on Custom Views

Click on Custom Setup. Click on Create New

Name the custom view

In the custom View Columns area, start typing in the field you want to use. Ie Tenant and then the list will appear and you can select the fields you want.

For this example, we would have Tenant Group Name, Tenant Group Address, Tenant Group Fixed Date End and maybe also Agent name

Then we need to filter down by a date range so that when we run the report we only see those lease end that are about to run out in selected date range.

Click on Add Rule. Choose the field you want i.e Tenant group Lease Date Ended. Click on the drop down next to Equals and select Less than or equal to. Then say no to run date

And put in a date 3 months from now. You will have to make a note to change this every couple of months. Click on Save Changes

To Run this view. Go to Tenancy, click on Custom Views and choose the Fixed term End view. When it shows on the screen it will show the information you want.

These process sheets are a quick guide, for more detailed information please still use the Help Files