REST Professional

Version 14.0 Upgrade

Participant Workbook

Workbook Title:	REST Professional Version 14.0 Upgrade
Version:	10 December 2015
Product:	REST Professional Version 14.0

Contents

About this course

The REST Professional Version 14.0 Upgrade course is designed to introduce participants to the features and enhancements of the REST Professional Version 14.0 release.

Pre-requisites

Participants should be familiar with the REST Professional Software and have a basic understanding of the real estate industry and property management processes.

Features included in this course

At the end of this course, you will be familiar with these new features and enhancements:

- Replicate Property Details
- RockendSMS Enhanced Integration
- Export Data Enhancements
- Energy Efficiency Rating
- Property Vacancy Counter Report

Using this workbook

You will find the following symbols throughout this workbook:

Symbol	Description
	Notes and additional information related to this topic
	This is a caution symbol, take particular care with this topic
	Handy Tip
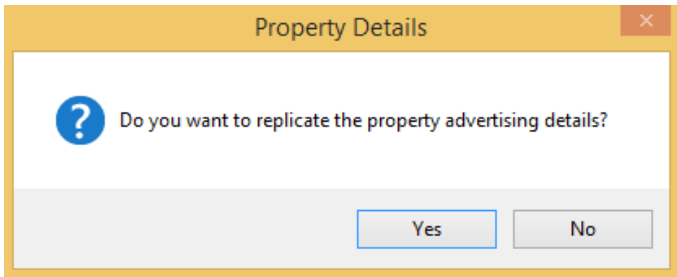
Replicate Property Details
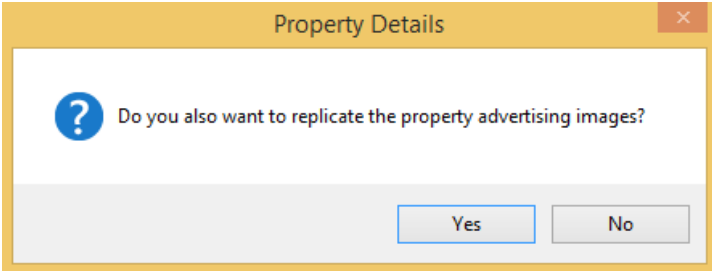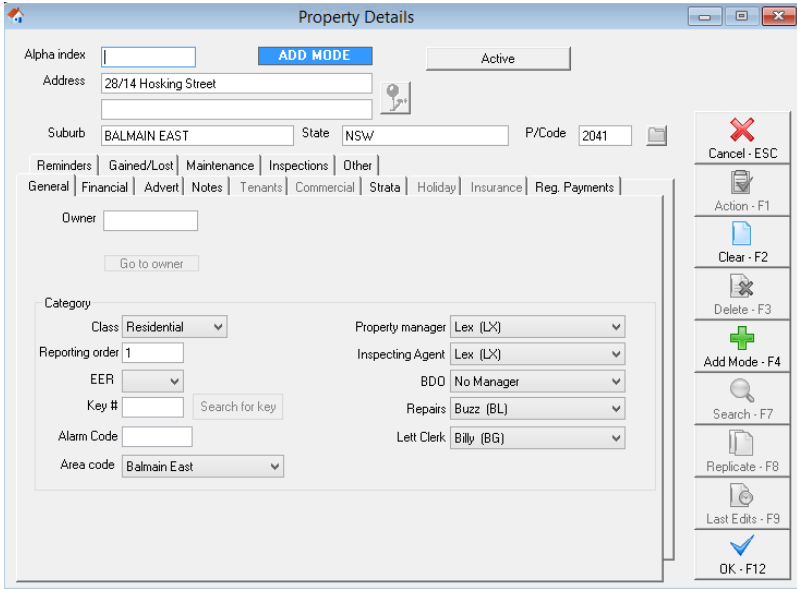
A new Replicate button has been added on the Property Details screen:

This allows the details of the property to be replicated when required for similar properties under management. For example, several apartments in a block.

Follow these steps to Replicate Property Details:

Step	Description
1.	Select **Files** > **Property Details**
2.	Click the **Replicate – F8** button
3.	A prompt displays: • Click **Yes** to replicate the Property Advertising Headline and Description from the Advert Copy tab. • Click **No** if you wish for the replicated property files Advertising tab to remain blank.

4.	If Yes is selected another prompt displays:
	Property Details
	(?) Do you also want to replicate the property advertising images?
	[Yes] [No]
	• Click **Yes** to replicate the Properties Advertising Images from the Images tab
	• Click **No** if you wish for the replicated property files Advertising Image tab to remain blank
5.	A replicated Property Detail file displays in Add Mode:
	The following table lists the data fields copied in the replicate property function and data from Company Default Settings:

Item	Replicated from Property	Company Default Setting
Property Advertising details (Optional) - when selected: replication includes the following in Advert tab: Advert Copy, Details, Features and General.	✓	
Property advertising images (Optional)- all images	✓	
General Tab > Address	✓	
Financial Tab > Fees (Excl.)		✓
Financial Tab > Rent > Payment period (D/W/M +1-99) setting		✓
Financial Tab > all Letting settings		✓
Notes tab> all Property Descriptions	✓	
Strata Tab > Strata Plan number	✓	

6.	Enter the new **Property Alpha Code**, attach an **Owner** to the new property and make any changes required to the replicated Property Detail file
7.	Click **OK – F12** to save

RockendSMS Enhanced Integration

REST Professional Version 14.0 introduces RockendSMS Online which allows single and bulk SMS messages to be sent via an online service.

Some of the features of RockendSMS Online include:

- A history of messages sent and received for single SMS messages
- The ability to manage an Opt Out list of contacts who do not wish to receive SMS messages
- The ability to schedule the delivery of messages

Prerequisites for RockendSMS Enhanced Integration

Existing Edgility customers will need to follow these three steps:

1. Complete the RockendSMS Third Party Service Configuration in **Company Details** and configure Users in **User Details**.
2. Contact Edgility to upgrade to Enhanced RockendSMS on 1300 764 451 or outside Australia on +61 2 9518 5955
3. Review the manual for detailed information on configuring REST Professional for Enhanced RockendSMS Integration.

REST Professional customers not currently using RockendSMS with Edgility will require an account. To sign up contact Edgility on 1300 764 451 or visit rockendsms.com.au

RockendSMS Third Party Service Configuration

To use RockendSMS Enhanced Integration, the email address saved against each User in REST Professional must be registered with Edgility:

As this is also a requirement of the previous RockendSMS functionality, existing Edgility customers may not need to complete this step.
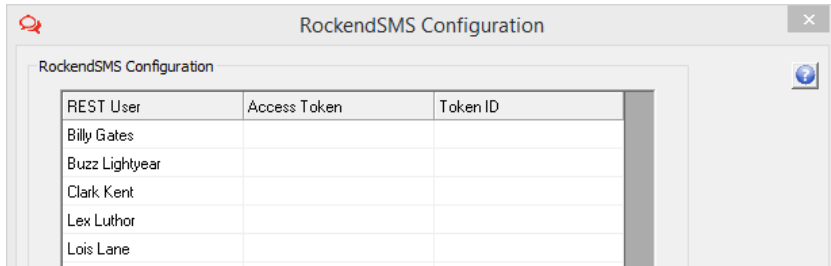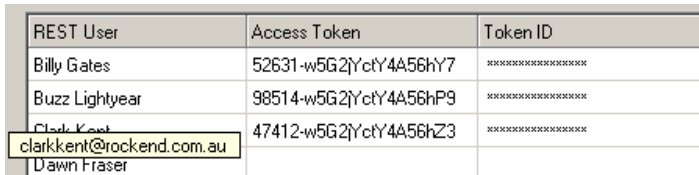
A new screen has been added in REST Professional Version 14.0 to allow individual users to be configured for RockendSMS Enhanced Integration. Users may be setup either manually or automatically, using the synchronisation function.

Note: RockendSMS Configuration must be completed by a user with a System Security Level of Statistics/Company Details/Passwords & above

Manual RockendSMS User Configuration
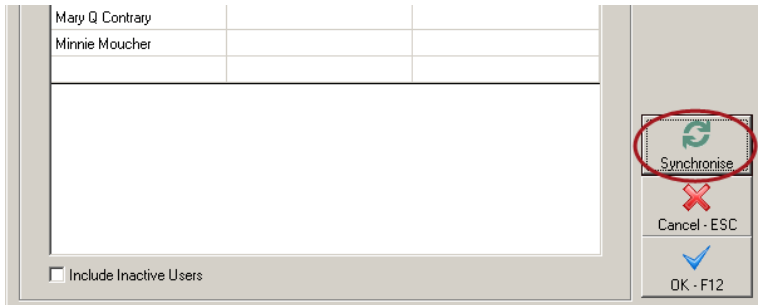
Follow these steps to manually activate RockendSMS Enhanced integration:

Step	Description
1.	Select **Other** > **Utilities** > **Company Details** > **Third Party**
2.	Select the **RockendSMS** checkbox
3.	Click the **Configure** button: All REST Professional Users with a System Security Level of Look Only / Print or higher will be listed
4.	Confirm the correct email address is setup in REST Professional by hovering over the REST User field to view the tooltip.
5.	For each user that needs to be configured to use RockendSMS Enhanced integration, enter the Access Token and Token ID provided by RockendSMS
6.	Select **OK – F12** to save RockendSMS Configuration

Automatic RockendSMS User Configuration

You can automatically import user details from RockendSMS to the Configuration screen through the Synchronisation function.

Follow these steps to automatically activate RockendSMS Enhanced integration through the Synchronisation function:

Step	Description
1.	Go to **Other** > **Utilities** > **Company Details** > **Third Party**
2.	Select the **RockendSMS** checkbox
3.	Select the **Configure** button
4.	Enter the **Access Token** and **Token ID** provided by Edgility for a RockendSMS Administrator
5.	Click **OK-F12** to save details
6.	Click the **Configure** button
7.	Click the **Synchronise** button
8.	A prompt will display to confirm the synchronisation is complete and the Access Token and Token ID will be populated for each user with an email address registered with RockendSMS
9.	Select **OK-F12** to save RockendSMS Configuration
10.	Select **OK-F12** to save Company Details

Note:
To use the synchronisation function to import credentials automatically, the logged in REST Professional User must be a RockendSMS Administrator, and their Rockend SMS credentials must be saved in the RockendSMS Configuration screen.

RockendSMS Security Level

A new security level of Administrator has been created for RockendSMS.

- Any templates created by an Administrator via RockendSMS will be global and accessible to all users.
- An Administrator may edit or delete templates by logging in to RockendSMS Online.
- You can set up as many Administrator users as you need. Please contact Edgility to set up Administrators via the website rockendsms.com.au or by calling 1300 764 451 or outside Australia +61 2 9518 5955.

Single SMS messages

When sending SMS messages to a single contact, the new RockendSMS browser screen will load for all REST Professional users configured for RockendSMS Enhanced Integration.
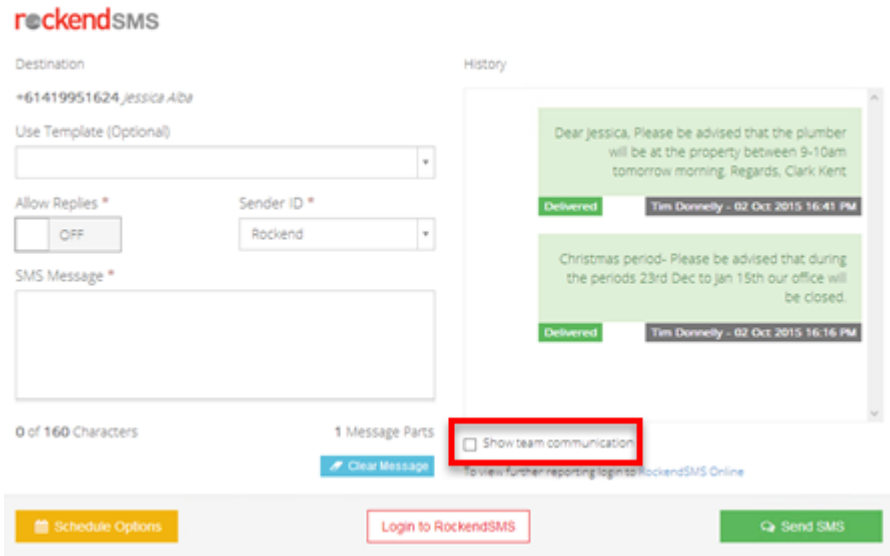
Note: If RockendSMS Configuration has not been activated, messages will be sent using the old RockendSMS functionality.

When the RockendSMS Enhanced Integration screen loads for a single contact, the screen will be ready to create and send a message to the selected contact.

Single SMS messages can be sent from all contact screens in REST Professional - Tenant, Owner, Creditor, Strata Plan, Vendor, Buyer, Solicitor and Insurance

Follow these steps to send a Single SMS message:

Step	Description
1.	Select the mobile icon next to the contact's mobile number
2.	The RockendSMS Single Message browser loads: Your conversation history for the selected contact (if available) will display Select the Show team communication checkbox to display previous contact by all REST Professional users

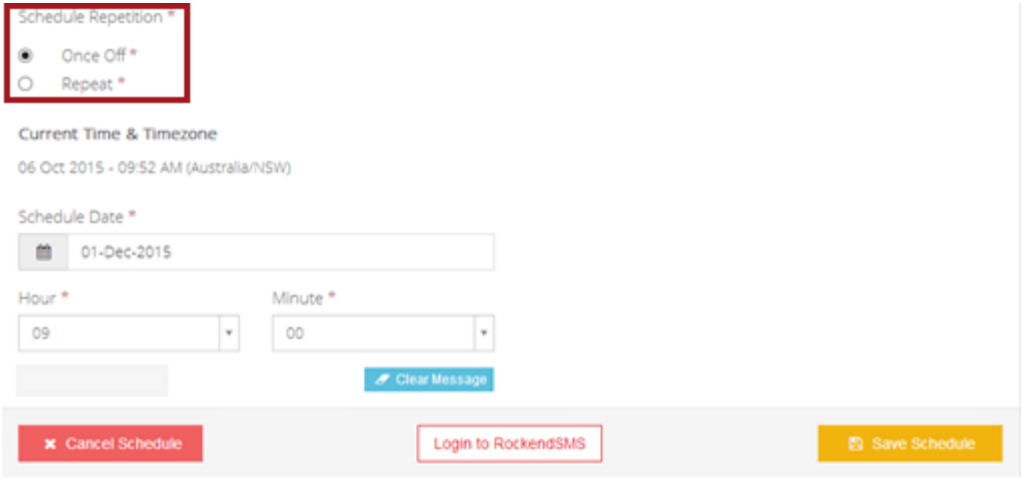|		
3.	Set **Allow Replies to ON** if you want to allow the contact to reply to the SMS message: Allow Replies * Sender ID * OFF Rockend Replies can be sent to the Web Inbox (accessed via RockendSMS Online) or to a verified sender's mobile number	
4.	Select **New Sender ID** in the Sender ID dropdown list to create and verify a new Sender ID	
5.	Type a message in the SMS Message text box, or select a template from the template list: SMS Message * Dear Jessica, Please be advised that the plumber will be at the property between 9-10am tomorrow morning. Regards, Clark Kent 125 of 160 Characters 1 Message Parts • If a template is selected, the Sender ID and text can be modified before the SMS message is sent **Handy Tip:** An SMS message can include up to 160 characters. If more than 160 characters are used per message, the character count and message parts will be updated as the message is being typed. Messages with multiple parts will be delivered to the recipient's handset as a single message on most modern devices. SMS messages are charged per part.	
6.	When the message is ready to be sent, click the Send SMS button: Send SMS	
7.	The confirmation screen loads:	

	Select the checkbox **I agree to the above** ⚠️ It is highly recommended that all RockendSMS users read the 2003 Spam Act and Consent, Identification and Unsubscribe notes on this screen when using RockendSMS Enhanced Integration for the first time
8.	Click the **Send Message** button. A confirmation message displays: Diary entries are created automatically for Single SMS messages to contacts with linked Action Diaries. • Solicitor and Insurance messages cannot be added to diary

Schedule Options

Single SMS Messages can be scheduled to be sent as a Once Off message at a later date/time, or on a regular repeat basis. Scheduled messages will continue to be delivered until the schedule is cancelled via RockendSMS Online.

Follow these steps to schedule a message:

Step	Description
1.	From the RockendSMS screen, click the Schedule Options button: **📅 Schedule Options**
2.	The Schedule Screen displays
3.	Select to Schedule Repetition - either Once Off or Repeat: Schedule Repetition * ● Once Off * ○ Repeat * Current Time & Timezone 06 Oct 2015 - 09:52 AM (Australia/NSW) Schedule Date * 📅 01-Dec-2015 Hour *　　　Minute * 09　　　　　00 ✏ Clear Message ✖ Cancel Schedule　　Login to RockendSMS　　📅 Save Schedule
	Once Off SMS: Current Time & Timezone 06 Oct 2015 - 09:52 AM (Australia/NSW) Schedule Date * 📅 01-Dec-2015 Hour *　　　　　Minute * 09　　　　　　　00 • Select **Schedule Date and Time**

rockend REST
The leader in property software　professional

Repeat SMS:

Schedule Date *

📅 01-Dec-2015

Hour *	Minute *
09 ▾	00 ▾

Send on the following days *

☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Send Frequency (Weeks) *

1. Send Weekly ▾

Finishing Options *

◉ No End *
○ At Date *

- Select **Schedule Date** – this is the date the messages start sending
- Select a **Time** for the messages to send
- Select the **day(s) of the week** the messages are to be sent
- Select the **Frequency** of the messages to be sent
- Choose and **End Option** – either No End or choose and end At Date

4.	Click **Save Schedule**, or Cancel Schedule if required
5.	The confirmation screen loads:

Send Messages ✕

Are you sure you want to send this message to **1 Number**?

Message is made up of **1 Part**

Scheduled to send at **01-Dec-2015 at 09:00**

Schedule will repeat every **week** on **Wednesday**. Schedule has no end date

I have read and understand the terms of use and agree to comply with the 2003 Spam Act ⌗.

The three key steps are Consent, Identification and Unsubscribe ⌄

- **Consent** - Only send commercial electronic messages with the addressee's consent - either express or inferred consent
- **Identification** - Include clear and accurate information about the person or business that is responsible for sending the commercial electronic message
- **Unsubscribe** - Ensure that a functional unsubscribe facility is included in all your commercial electronic messages. Deal with unsubscribe requests promptly

I agree to the above * ☑

Close | Schedule Messages

Select the checkbox **I agree to the above**

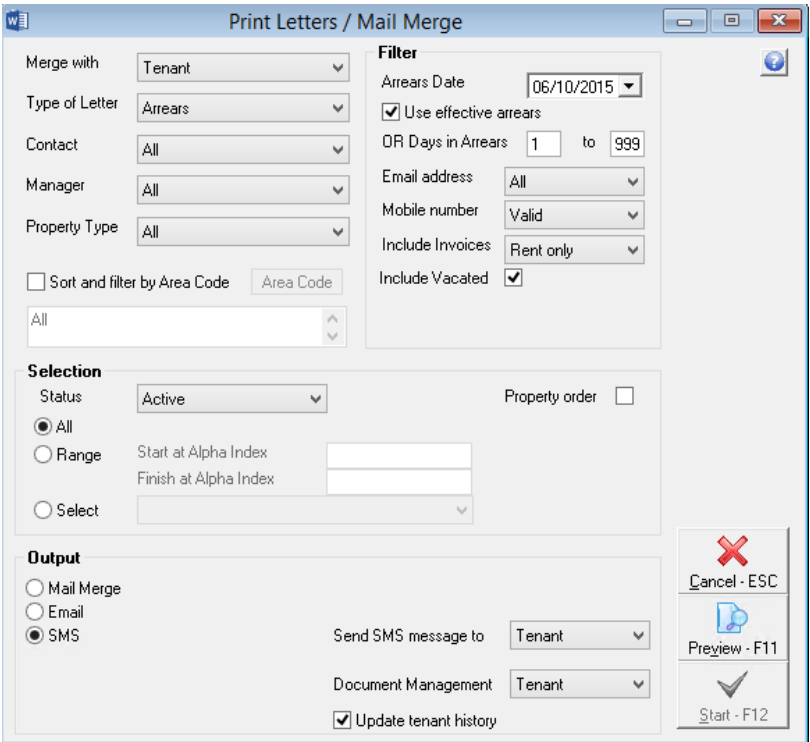|		
	⚠	It is highly recommended that all RockendSMS users read the 2003 Spam Act and Consent, Identification and Unsubscribe notes on this screen when using RockendSMS Enhanced Integration for the first time.
6.		Click the **Schedule Messages** button. A confirmation message displays: **RockendSMS - Single Message** ⓘ SMS Message to Jessica Alba submitted and added to diary OK • Ledger entries are created automatically for Single SMS messages • Diary entries are created automatically for Single SMS messages to contacts with linked Action Diaries • Solicitor and Insurance messages cannot be added to diary

rockend REST
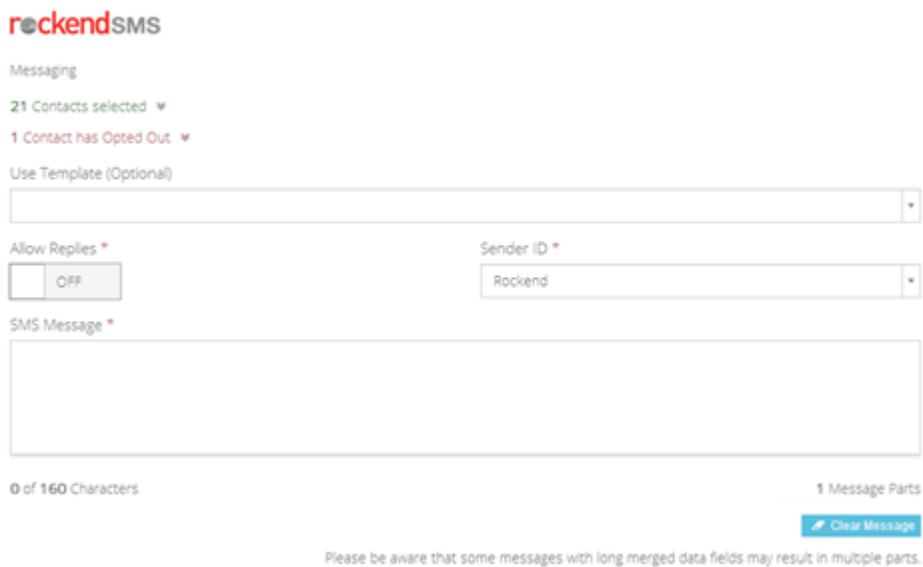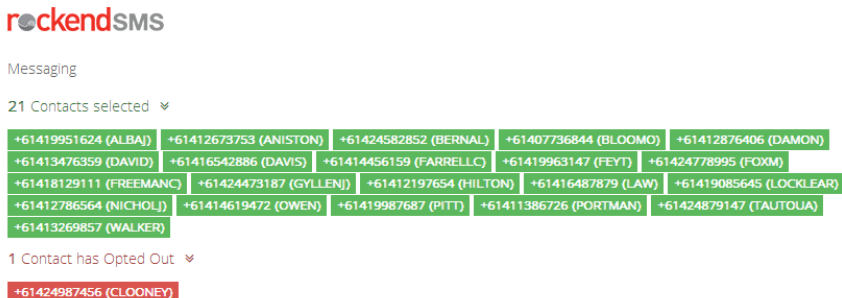The leader in property software   professional

Bulk SMS Messages

The menu item **Other** > **Print Letters or Export Data** has been renamed **Print Letters / Mail Merge**.
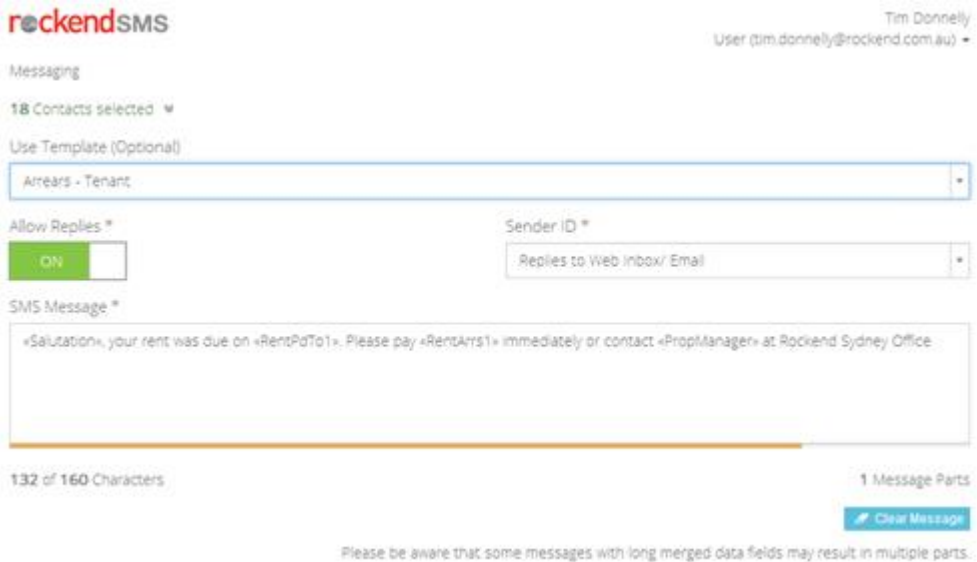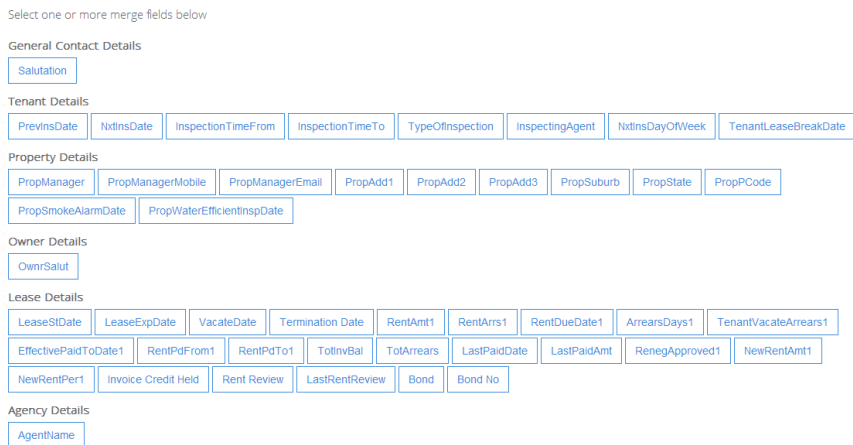
When sending SMS messages to multiple contacts from **Other** > **Print Letters / Mail Merge**, the new RockendSMS browser screen loads for all REST users configured for RockendSMS Enhanced Integration. If RockendSMS Configuration has not been activated, messages are sent using the old RockendSMS functionality.

When the RockendSMS Enhanced Integration screen loads for bulk contacts, the screen is ready to create and send a message to the selected contacts.

To send a Bulk SMS message:

Step	Description
1.	Select **Other** > **Print Letters / Mail Merge**
2.	Select the **Contact type** under Merge with: • For Tenants, also select the Type of Letter and Contact type e.g. Primary or Repairs
3.	Set all the required Filter and Selection settings to load the contacts who will be receiving the SMS message • Change the **Mobile Number** to **Valid**
4.	Change the **Output** to **SMS**

5.	Select from the Send SMS message to dropdown to send the message to the Tenant or Owner
	Note: These options are only available when Merge with Tenant is selected
6.	If you wish to add the SMS message to Document Management folders, select **Document Management**
7.	Select the **Update Tenant History** checkbox for a record of the message to appear on the tenants ledger
8.	Click the **Preview** button and review the list of contacts
9.	Click **Proceed**. The RockendSMS Bulk Message screen loads: • The Save as Template button will only be visible and accessible to a user set as a RockendSMS Administrator
10.	The contacts selected display at the top of the screen. Expand this section to view the phone numbers that will receive the message: • Contacts who previously opted out of receiving SMS notifications will display in red text and will not receive the message
11.	Set **Allow Replies** to **ON** if you want to allow the contact to reply to the SMS message:

		• Replies can be sent to the Web Inbox (accessed via RockendSMS Online) or to a verified sender's mobile number
12.		Select New Sender ID in the Sender ID dropdown list to create and verify a new Sender ID
13.		There are three options to create a message: • Type a message in the SMS Message text box • Select a template from the template list • Create a message using the available merge fields • If a template is selected, the Sender ID and text can be modified before the SMS message is sent
14.		To include merge fields in the SMS message, select the required fields from the available merge fields: • A space will automatically be added after each merge field
15.		When the message is ready to be submitted, click the **Send SMS** button
16.		The confirmation screen loads:

Select the checkbox **I agree to the above**

⚠️ It is highly recommended that all RockendSMS users read the 2003 Spam Act and Consent, Identification and Unsubscribe notes on this screen when using RockendSMS Enhanced Integration for the first time

17.	Click the **Send Message** button. If Document Management was selected, you will be prompted to add the message to document management:
18.	After the message is submitted, a confirmation message displays and the diary will be updated for contact types with linked Action Diaries:
19.	The RockendSMS browser and the Print Letters / Mail Merge screen closes after the message is submitted.

Bulk Message Templates

A number of predefined Bulk SMS templates are available to be selected. When a Bulk SMS message is being created, it can be saved as a template at any time by clicking the **Save as Template** button before sending the message. Templates can only be created by RockendSMS Administrators:

Use Template (Optional)

Allow Replies *   Sender ID *

OFF   Rockend

SMS Message *

Dear «Salutation», wishing you and your family a happy and safe festive season. Best Wishes, «PropManager»

107 of 160 Characters   1 Message Parts

Save as Template   Clear Message

Please be aware that some messages with long merged data fields may result in multiple parts.

When creating a new template, the Sender ID will default to the ID selected on the message being created. When the saved template is selected by another user, the Sender ID and message text can be changed before sending the message.

Handy Tip: An SMS message can include up to 160 characters. If more than 160 characters are used per message, the character count and message parts will be updated as the message is being typed. Messages with multiple parts will be delivered to the recipient's handset as a single message on most modern devices. SMS messages are charged per part.
Please be aware that messages with merge fields can result in multiple part messages depending on the merged data.

Schedule Options

Bulk SMS Messages can also be scheduled to be sent as a One Off message at a later date/time or on a regular repeat basis. Scheduled messages will continue to be delivered until the schedule is cancelled via RockendSMS Online.

Refer back to page 14 of this manual for information on scheduling messages

RockendSMS Online

Access to the RockendSMS website is via any RockendSMS Message screen – either the one off or bulk message screens.

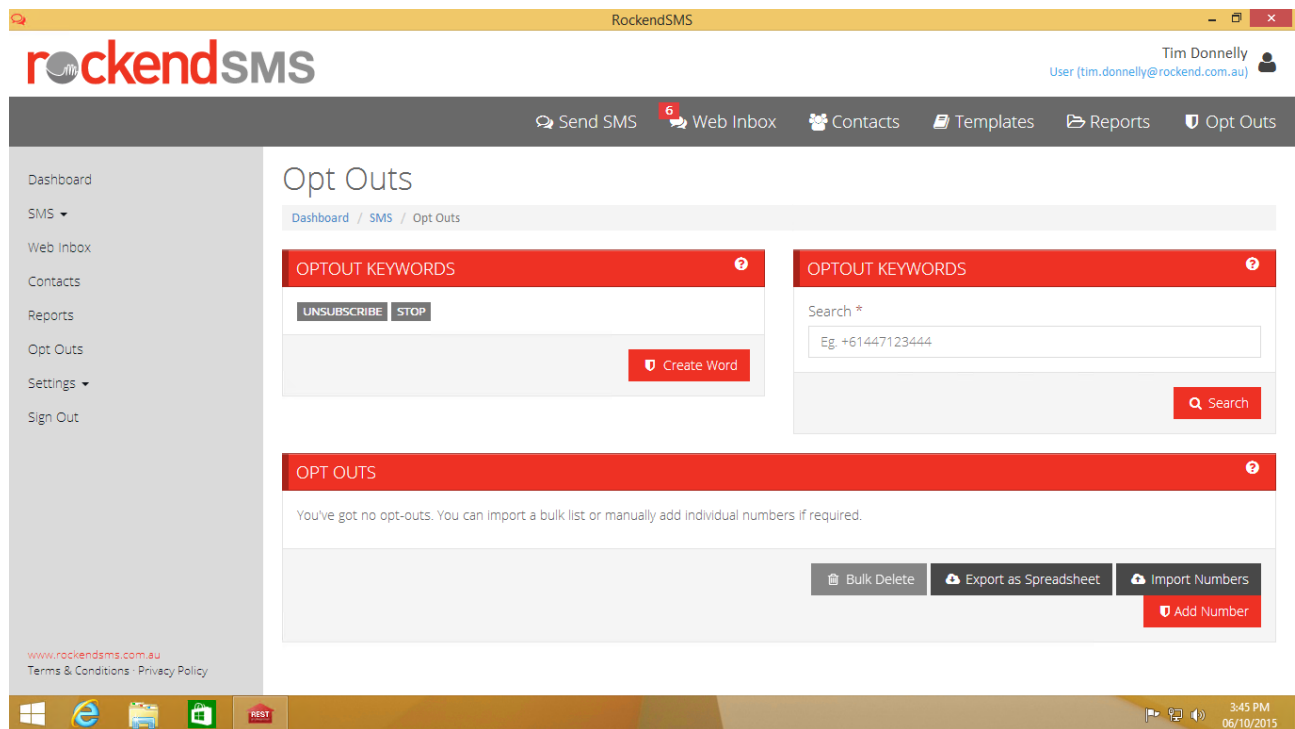Click the **Login to RockendSMS** button to access the website:

RockendSMS Online provides a range of advanced features to assist in optimising SMS communication with your database. Visit the RockendSMS website for useful videos and tutorials or download the RockendSMS Online manual.
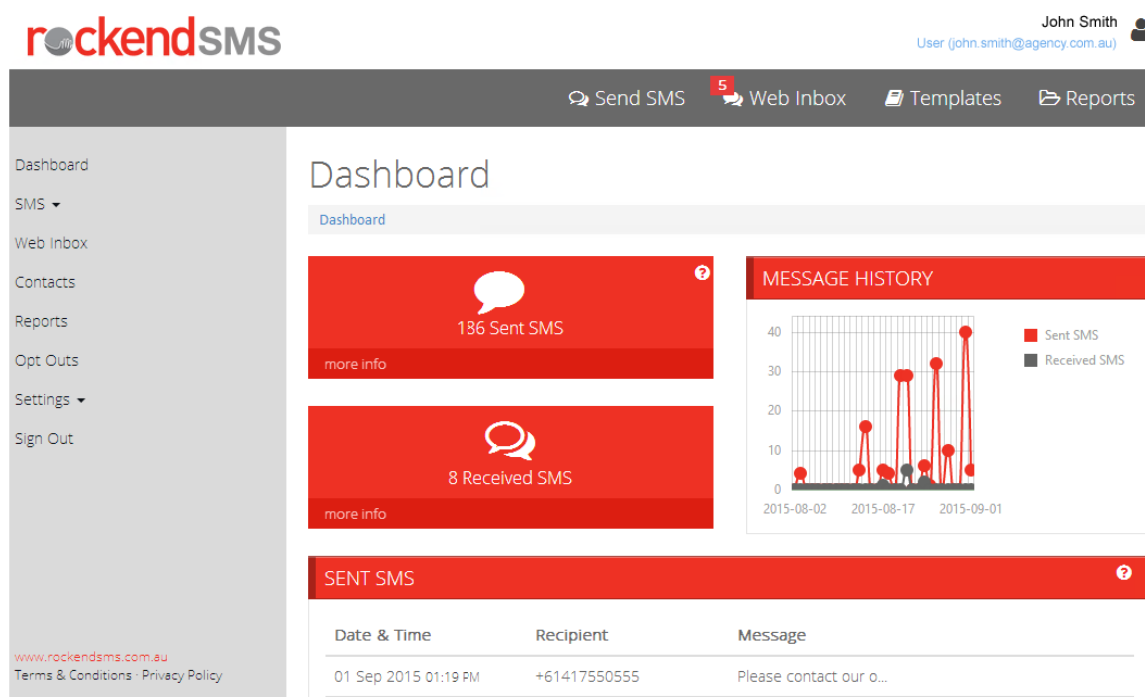
Opt Outs

With the introduction of RockendSMS Enhanced Integration, your contacts will have the ability to opt out of receiving further SMS notifications from your office.

The Opt Out list is updated automatically when contacts opt out after receiving SMS messages sent via the RockendSMS browser. The Opt Out list can be managed in RockendSMS Online, and can also be updated manually.

Information for the features of RockendSMS Online is available from www.rockendsms.com.au

If you experience difficulties with the setup or use of this new feature please contact Rockend Support via the Customer Lounge at www.rockend.com.au or 1300 657 700.

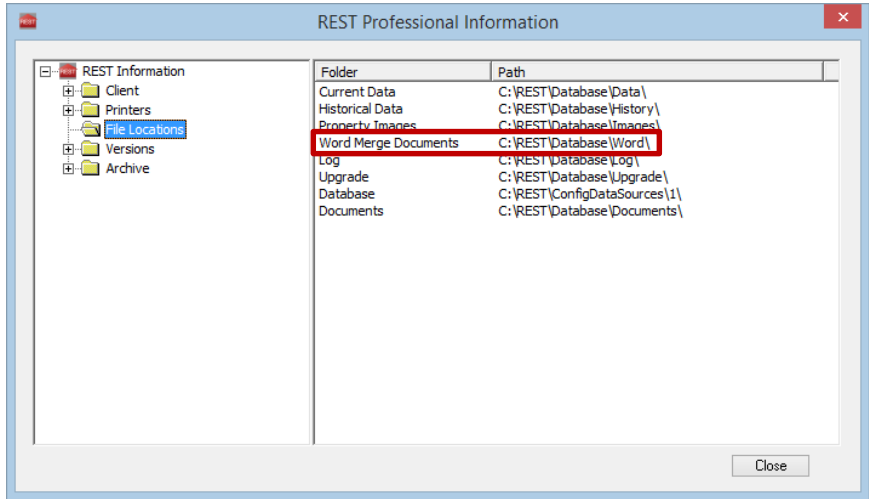## Converting existing SMS Word templates to use in RockendSMS

The following default REST Professional SMS templates are available to use when you send a message from RockendSMS and do not need to be converted manually:
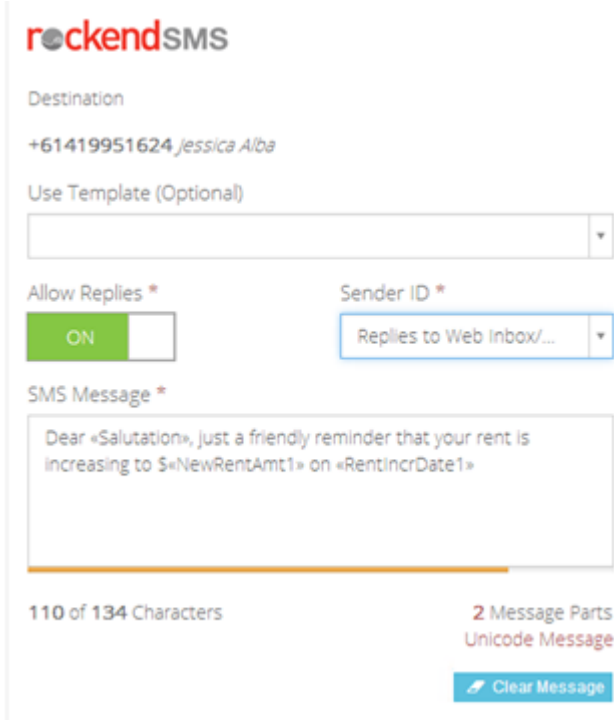
- Arrears Water SMSMerge
- ArrearsSMSMerge
- Inspection FollowUp_Owner SMS
- Inspection FollowUp_Tenant SMS
- Inspection Planner_Owner Invitation SMS
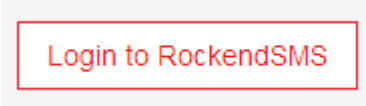- Inspection Planner_Tenant Notification SMS
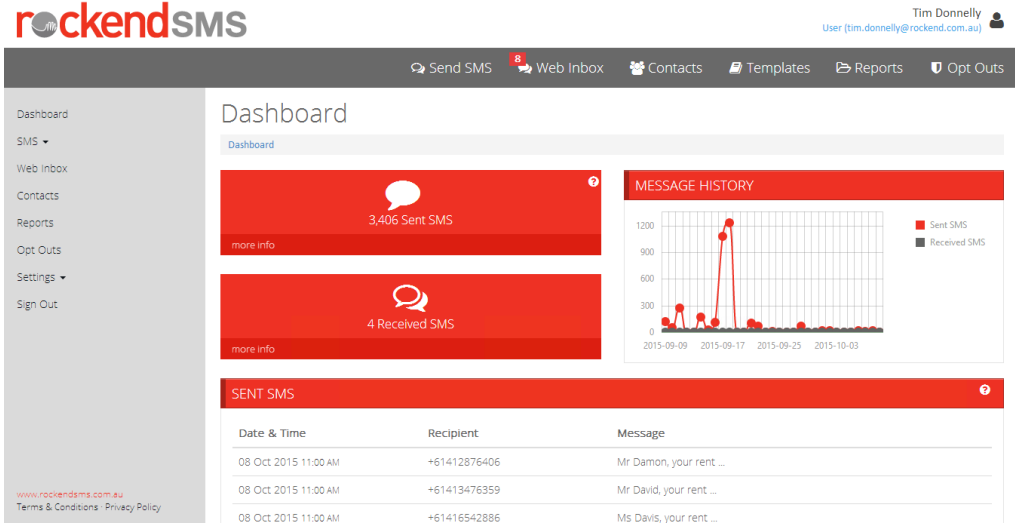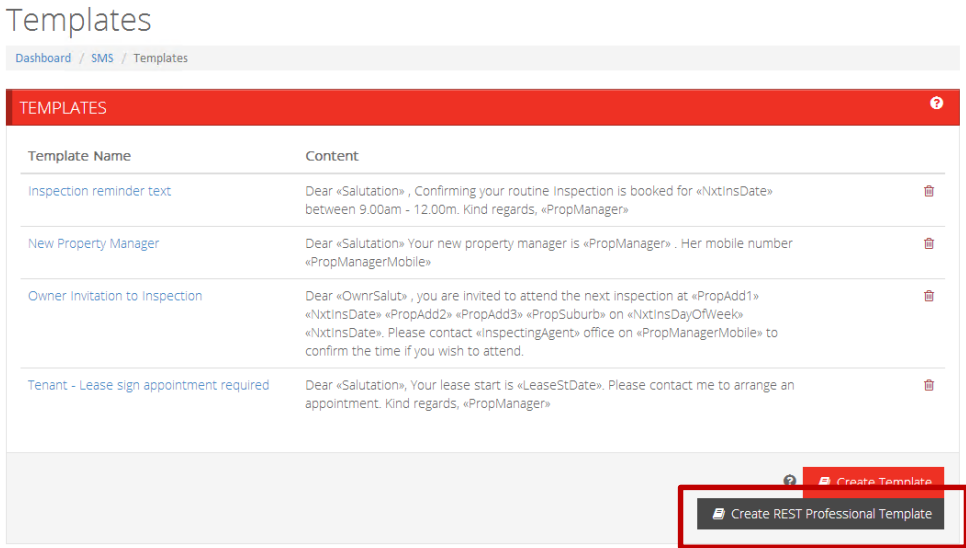
Important: Users with RockendSMS Online Administrator security can create & save new SMS templates.

Follow these steps to convert additional Word templates to be used in RockendSMS Online

Step	Description
1.	Navigate to your REST Word folder If you are unsure where to find the REST Word directory, log into RES Professional and browse to **Help** > **About REST** > **REST Info** > **File Locations**:
2.	Open the required template from the REST Word folder
3.	Remove the top two lines - X-Cellphone and X-From-Cellphone - so that only the body of the message remains:

X-Cellphone: «Mobile»
X-From-Cellphone: «AgentName»

Dear «Salutation», just a friendly reminder that your rent is increasing to
$«NewRentAmt1» on «RentIncrDate1»

- Ensure no blank lines appear above the message

4.	Highlight with your mouse the message text, including all the merge fields and copy (right-click > Copy or Ctrl-C)
5.	Launch RockendSMS – either individual or bulk message screen - and paste (right-click > Paste or Ctrl-V) the copied text into a new template:
6.	Click **Save as Template** button

You can also log into RockendSMS Online to create SMS Templates:

Step	Description
1.	Click on the **Log into RockendSMS** button on any single or bulk RockendSMS screen: Login to RockendSMS
2.	The RockendSMS Online Dashboard displays:
3.	Click the **Templates** menu option
4.	Click the **Create REST Professional Template** to add a new SMS template:
5.	Paste the copied SMS template text, edit if necessary:

Templates

Dashboard / SMS / Templates / Create Template

CREATE TEMPLATE

Name * ❓

Rent Increase Reminder

Allow Replies * ❓

ON

Sender ID *

Replies to Web Inbox/ Email ▼

SMS Message *

Dear «Salutation», just a friendly reminder that your rent is increasing to $«NewRentAmt1» on «RentIncrDate1»

110 of **134** Characters

2 Message Parts
Unicode Message

General Contact Details

Salutation   Mobile

Tenant Details

- Use the on screen merge fields if required

6.	Click **Save**

Export Data

REST Professional Version 14.0 offers an enhancement to the existing Print Letter / Export Data functionality by enabling users to export selected fields to Excel. This feature will allow you to:

- Create New Templates
- Export to an Existing Template
- Delete a Template
- Export to File or Excel

User Configuration

A new security setting has been added to the **User file** > **User Profile** tab, named **Print Letters/Export Data**:

This security level can be changed for each REST Professional user. Changes to User security levels must be completed by a user with the REST Professional system security level Statistics/Company Details/Passwords & above.

None - Users cannot merge data through Print Letters / Mail Merge or export data and templates through Export Data

Print Letters / Mail Merge - Users can merge data through Print Letters / Mail Merge, which covers merging to Microsoft Word, Email, SMS, ADL Forms and REI Forms Live

Export Data & above - Users can merge data through Print Letters / Mail Merge and export templates to Excel through Export Data

Manage Templates & above - Users can merge data through Print Letters / Mail Merge and create, delete and export templates through Export Data
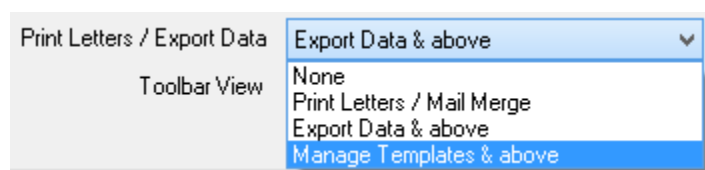
The upgrade to REST Professional Version 14.0 automatically sets the Print Letters / Export Data security level for most users to **Export Data & above**, which allows access to existing mail merge functionality as well as the new functionality of exporting templates to Excel.

A Print Letters security level of **Manage Templates & above** will be set for REST Professional users with a system security level of Statistics/Company Details/Passwords & above.

When User Configuration and RockendSMS Third Party Configuration are completed successfully, registered users will be ready to use RockendSMS Enhanced Integration.

Prerequisites

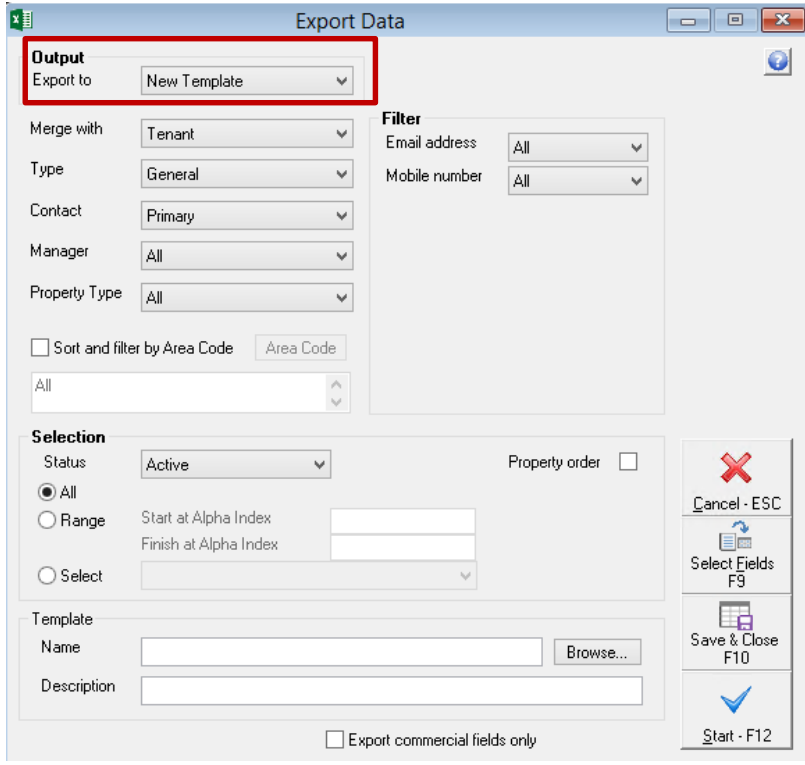Microsoft Excel must be installed and registered to create and export templates
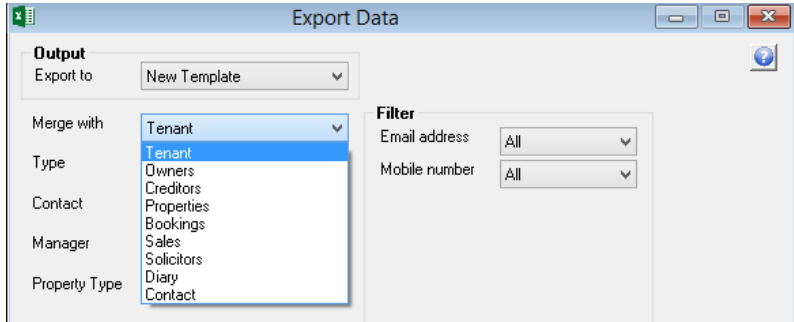
To export templates a Print Letters / Export Data security level of **Export Data & above** is required
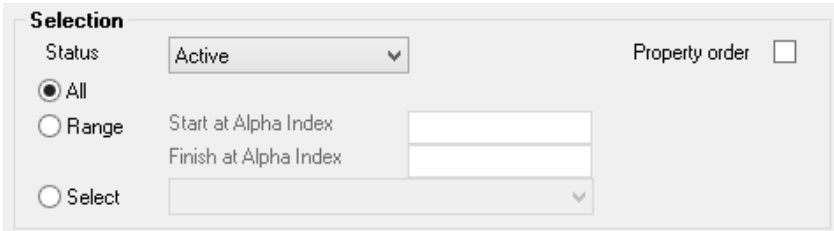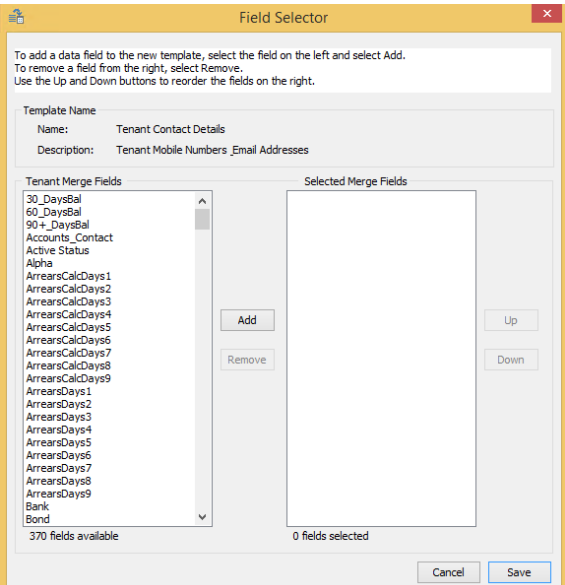
To create new templates and delete existing templates a Print Letters / Export Data security level of **Manage Templates & above** is required
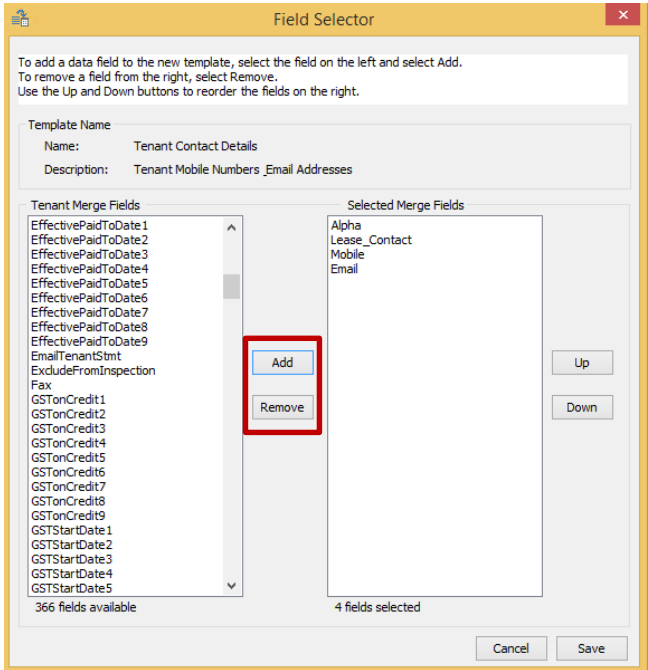
Export to New Template

Creating an Export Template is a new feature of Export Data. A security level of Manage Templates & above is required to create new templates.

Follow these steps to create a new Export Template:

Step	Description
1.	Select **Other** > **Export Data**
2.	Select the Output option **Export to New Template**:
3.	Select the contact type under Merge with:

Step 2 screenshot:

Step 3 screenshot:

Selecting the following contacts types activate additional filters to further define the selection of data:

Tenant – Email address and Mobile number

Owners – Account type, Email address and Mobile number

	Creditors – Creditor Category, Email address and Mobile number
	Property – Account types and Sort and filter by Area Code, Email address and Mobile number
	Bookings – Email address and Mobile number
	Sales – Sale Group and Sale Status
	Diary – Start date from, Start date to and Commercial diary checkbox
	Contact – Sort and filter by Area Code, Email address and Mobile number
	Note: Selecting to merge with Tenant or Contact loads additional options to select the Type of Letter which then activates additional filters to further define the selection of data
	Selecting to merge Contact loads an additional option to select the Contact type
4.	Set Selection options to load the contacts to be included in export:
	Selecting the Property Order checkbox sorts the selected records in property order
5.	Enter a **Template Name** and **Description**:
	• Template names must be unique
6.	Click the **Select Fields – F9** button. A list of available fields displays for the selected contact type:

7.	Select one or more merge fields from the available merge fields and click the **Add** button to move the fields across: • To remove fields from the Selected Merge Fields column, select the fields and use the Remove button • To reorder the fields in the Selected Merge Fields column, use the Up and Down buttons	
8.	Select Save to return to the Export Data screen and save the selected merge fields	
9.	Select **Save & Close – F10** to save the template and close Export Data. The template will now be available to be exported from the Existing Templates list. OR Select **Start – F12** to generate the export file and save the template to the Existing Templates list.	

Example of Excel Report:

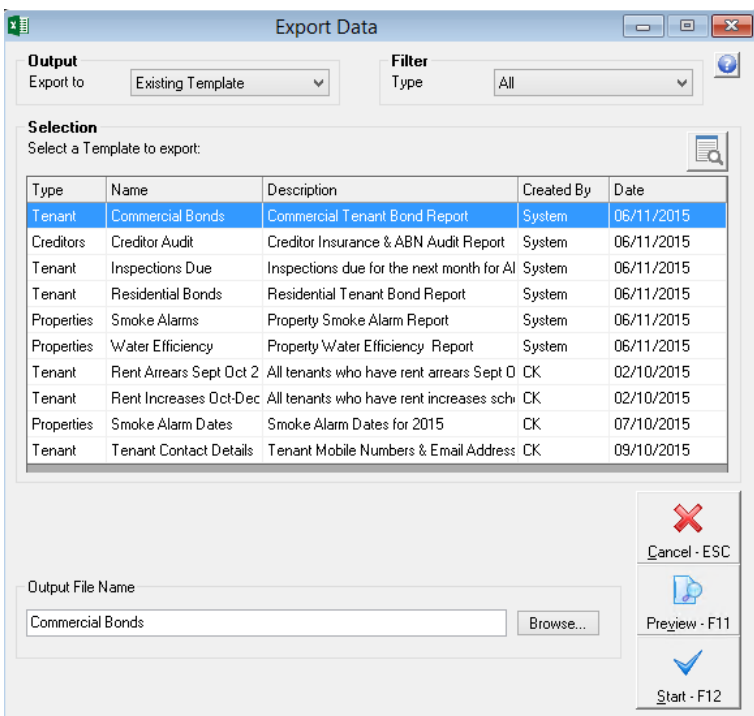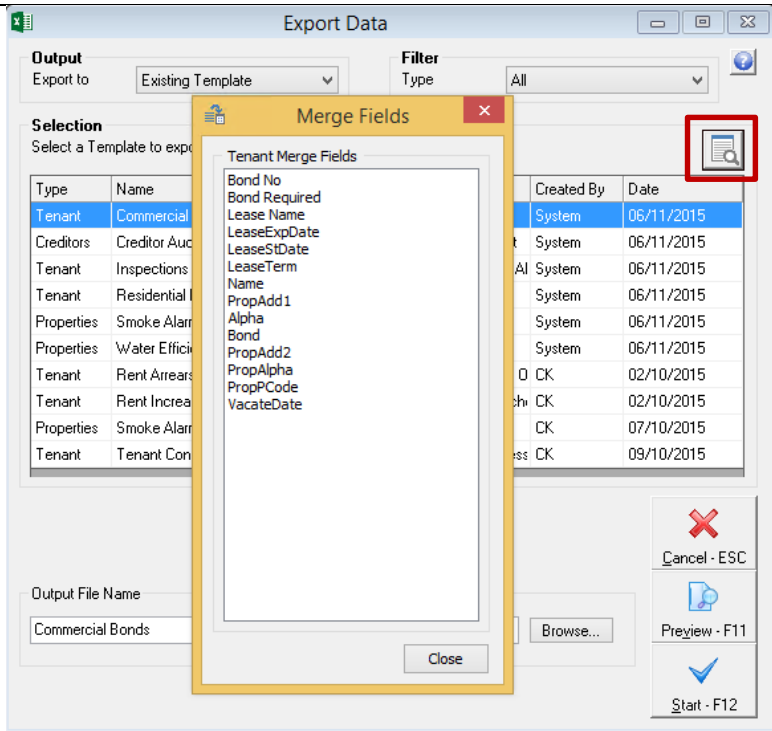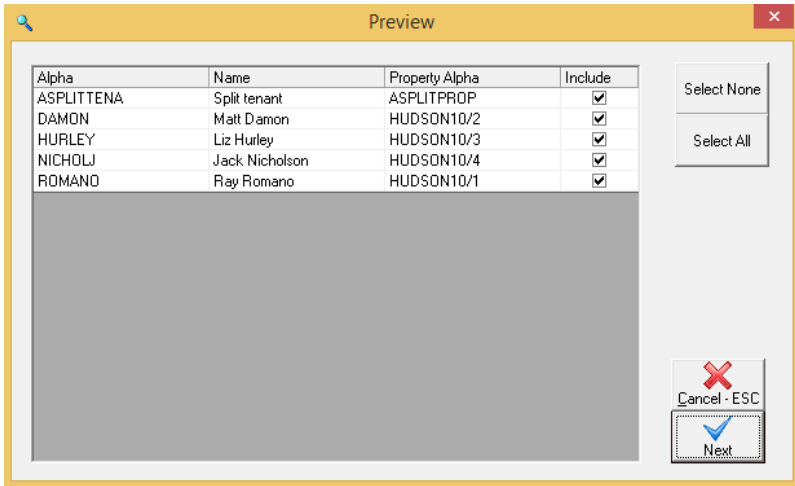|	Alpha	Lease_Contact	Mobile	Email
1	Alpha	Lease_Contact	Mobile	Email
2	ALBAJ	Y	419951624	j.alba@optusnet.com.au
3	ANISTON	Y	412673753	jennifera@aria.com.au
4	ASPLITTENA	Y		
5	BERNAL	Y	424582852	gael@optus.com.au
6	BLOOMO	Y	407736844	pirate@elizabethtown.com.au
7	CLOONEY	Y	424987456	george@cafeitalia.com.au
8	CROWE	Y		
9	CRUZP	Y		
10	DAMON	Y	412876406	damon@seascape.com.au
11	DAVID	Y	413476359	craig@walkingaway.com
12	DAVIS	Y	416542886	geena@davis.com.au
13	DEPP	Y		johnny@21jumpstreet.com.au
14	FARRELLC	Y	414456159	colin@phonebooth.com.au
15	FEYT	Y	419963147	tina@30rock.com.au
16	FOXM	Y	424778995	mf@lostisland.com.au
17	FREEMANC	Y	418129111	winsgold@olympics2000.com.au
18	GYLLENJ	N		
19	GYLLENJ	Y	424473187	jake_kirsten@bigpond.com.au
20	HILTON	Y	412197654	paris.hilton@hiltonvideos.com
21	HURLEY	Y	15767654	hurley@hughgrant.com.au
22	JOHANSSONS	Y		sj@iinet.com.au
23	LAW	Y	416487879	j.law@thenannys.com.au
24	LOCKLEAR	Y	419085645	heather@melrose.com.au
25	LONGORIA	Y		desperate@wysteria.com.au

Tenant Contact Details.xls

Export to Existing Template

Exporting to an Existing Template is a new feature of Export Data. A security level of **Export Data & above** is required to export existing templates.

The upgrade to Version 14.0 of REST Professional includes a number of System Templates to provide examples. System Templates can be used by any user with a security level of Export Data & above and cannot be deleted.

Follow these steps to Export Data to an existing template:

Step	Description
1.	Select **Other** > **Export Data**
2.	Select the Output option **Export to Existing Template**: • The Selection grid displays System templates in alphabetical order, followed by User Defined templates grouped by merge type
3.	Use the **Type** dropdown to filter the Selection in the grid to a specific group
4.	Select a **template to export**. The **Output File Name** populates automatically and can be modified before proceeding
5.	Click the **View** button for a list of the merge fields included in the selected template:

- Select Close to return to the Export Data screen

| 6. | Click the **Preview** button to review the records included in the merge: |

- Records can be excluded on this screen before creating the export file

| 7. | Select **Start** (Or **Next** from the Preview screen). If the Output File Name already exists in the specified location you are prompted to overwrite the existing file or specify a different file name |

| 8. | The file opens with the merged records in Microsoft Excel and a copy of the file saves in the specified location. |
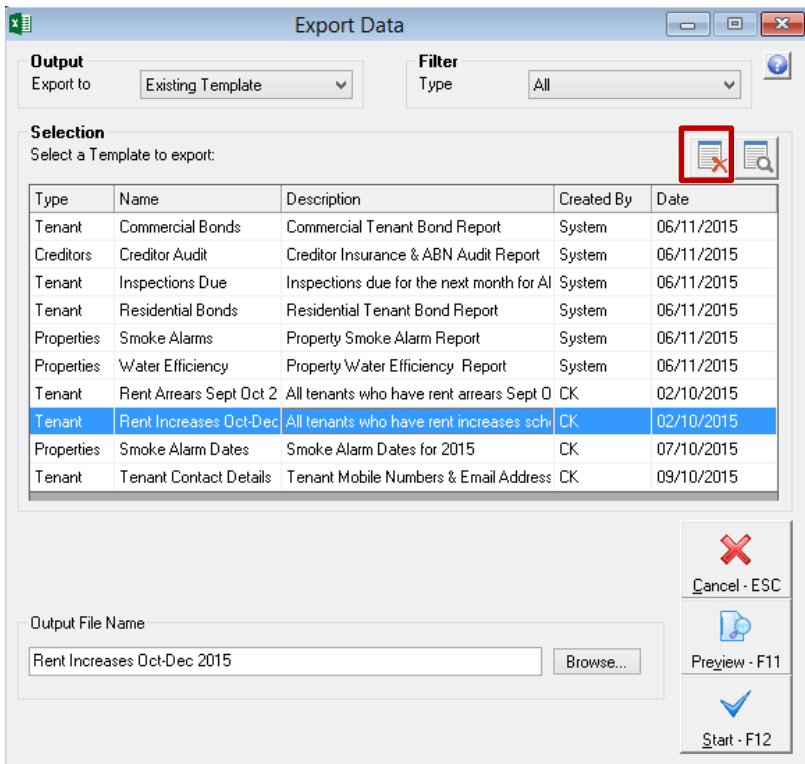
Deleting a Template

A security level of **Manage Templates & above** is required to delete existing User Defined templates.

Note: System templates cannot be deleted.

Follow these steps to delete a user defined template:

Step	Description
1.	Select **Other** > **Export Data** > **Output Export to Existing Template.**
2.	Select the **User Defined** template you wish to delete.
3.	Click the **Delete** button: A confirmation message displays and the deleted template is removed from the list of available templates.

Energy Efficiency Rating

A new field is available on the property file to record the Energy Efficiency Rating of that property:

The EER field appears on both Property Management and Sales Property files.

The energy performance of new buildings in the ACT must be demonstrated when applying for building approval in order to meet the mandatory minimum energy efficiency standards.

The Energy Efficiency Rating can be used in other states but at this stage it is not mandatory.

The EER Rating is from .0 to 10.0 and is available to be uploaded to Advertising Portals.

Property Vacancy Counter Report

The Property Vacancy Counter report is designed to be issued to property seekers or as a comparison of properties you have on the market for potential landlords. The New Property Vacancy Counter Report has been enhanced to display up to two Open Home entries:

Follow these steps to generate the Property Counter Report:

Step	Description
1.	Go to **Reports** > **Property** > **Vacancy Counter Report**
2.	Select from the filter screen the inclusions in your report:
3.	Click **Print**

Thank you for completing training with Rockend

That concludes this REST Professional course. We hope that your expectations have been met, and to see you for more training in the future.

Below is the REST Professional Learning Path highlighting the other courses you might wish to attend.

For more information or further training requests please contact your
Account Manager on 1300 657 700.