

REST Professional Version 14.0 Upgrade

Participant Workbook

NOT TO BE REPRODUCED IN ANY WAY

Copyright Reserved 2015

The staff of Rockend Technology Pty Limited has taken due care in preparing this Training Manual. However, nothing contained herein modifies or alters in any way the standard terms set out in the REST Professional Services Arrangements booklet under which it is provided.

All rights in Software including this Manual, Sample Material and methods are reserved and are supplied on the express condition that the client acquires only a licence to use, and the title and copyright vest entirely in Rockend Technology Pty Limited. Reproduction (except as provided herein) in any form or by any means is not permitted nor shall it be lent, sold, hired out or made available to persons other than the staff of the client agencies. The client undertakes to prevent copying or use by third parties and the due observance of the above.

Rockend Technology Pty Limited

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

Contents

Contents	3
About this course	4
Pre-requisites	4
Features included in this course.....	4
Using this workbook	4
Replicate Property Details	5
RockendSMS Enhanced Integration	8
Prerequisites for RockendSMS Enhanced Integration.....	8
RockendSMS Third Party Service Configuration	8
Manual RockendSMS User Configuration	9
Automatic RockendSMS User Configuration	10
RockendSMS Security Level.....	11
Single SMS messages	11
Schedule Options	14
Bulk SMS Messages	17
Bulk Message Templates	21
Schedule Options	21
RockendSMS Online	22
Opt Outs	23
Converting existing SMS Word templates to use in RockendSMS	24
Export Data.....	28
User Configuration.....	28
Print Letters / Export Data security levels	29
Prerequisites.....	29
Export to New Template	30
Export to Existing Template	34
Deleting a Template	36
Energy Efficiency Rating.....	37
Property Vacancy Counter Report.....	38

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


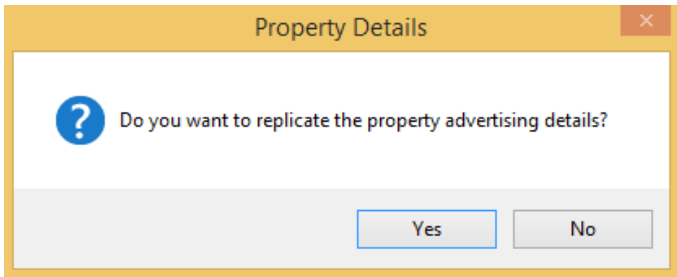
Replicate Property Details

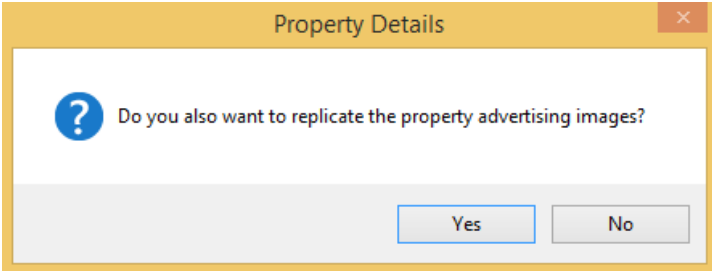
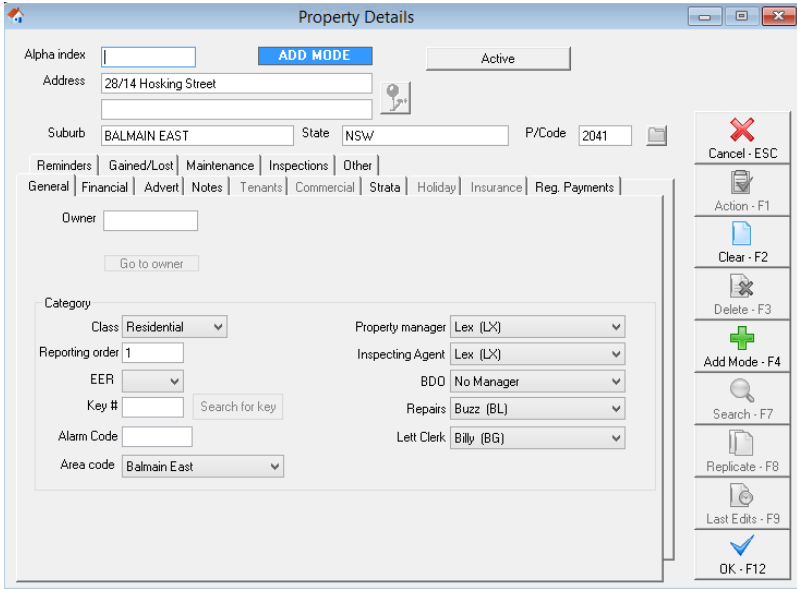
A new Replicate button has been added on the Property Details screen:

The screenshot shows the 'Property Details' window. The 'Alpha index' is 'HOSK14/28' and the 'Address' is '28/14 Hosking Street'. The 'Suburb' is 'BALMAIN EAST' and the 'State' is 'NSW'. The 'P/Code' is '2041'. The 'Owner' is 'AFFLECK' with details: 'Ben Affleck & Jennifer Garner, 158 Brighton Blvd, BEN BUCKLER POINT NSW 2026, H:(02) 9375 3186'. The 'Category' is 'Residential'. The 'Property manager' is 'Lex (LX)'. The 'Inspecting Agent' is 'Lex (LX)'. The 'BDO' is 'No Manager'. The 'Repairs' are 'Buzz (BL)'. The 'Lett Clerk' is 'Billy (BG)'. The 'Key #' is '47'. The 'Alarm Code' is blank. The 'Area code' is 'Balmain East'. The 'Replicate - F8' button in the right-hand toolbar is highlighted with a red box.

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.	<p>A prompt displays:</p>  <ul style="list-style-type: none"> 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.	<p>If Yes is selected another prompt displays:</p> <div data-bbox="541 230 1256 499"></div> <ul style="list-style-type: none">• 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.	<p>A replicated Property Detail file displays in Add Mode:</p> <div data-bbox="497 694 1297 1281"></div> <p>The following table lists the data fields copied in the replicate property function and data from Company Default Settings:</p>

		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:

The screenshot displays the 'User Details' window. At the top, there's a title bar with a user icon and the text 'User Details'. Below the title bar, there are input fields for 'Initials' (containing 'CK'), 'First Name' (containing 'Clark'), 'Last Name' (containing 'Kent'), and 'Full name' (containing 'Clark Kent'). To the right of these fields is an 'Active' checkbox. Below the input fields are three tabs: 'General', 'User Profile', and 'Login Options'. The 'General' tab is selected, showing a 'Contact' section with fields for 'Direct' (9877 7474), 'After Hours', 'Mobile' (0411 897 897), and a photo placeholder with a '+' icon and 'Add Photo' text. The 'Email' field (clarkk@rockend.com.au) is highlighted with a red rectangle. Below the email field is a 'Location' field (Sydney). On the right side of the window, there are two buttons: 'Cancel - ESC' with a red 'X' icon and 'Clear - F2' with a blue 'C' icon.

As this is also a requirement of the previous RockendSMS functionality, existing Edgility customers may not need to complete this step.

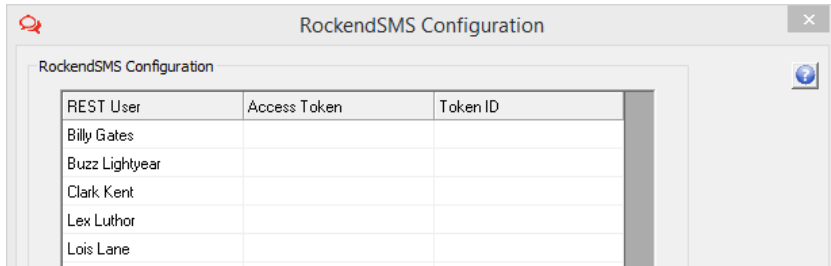
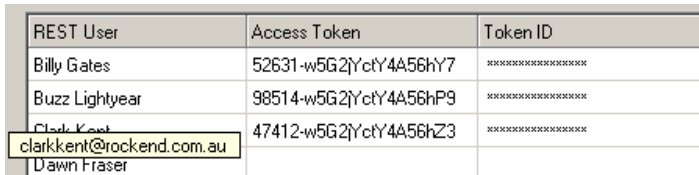
A new screen has been added in REST Professional Version 14.0 to allow individual users to be configured for RockendSMS Enhanced Integration. Users may be setup either manually or automatically, using the synchronisation function.



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

Manual RockendSMS User Configuration

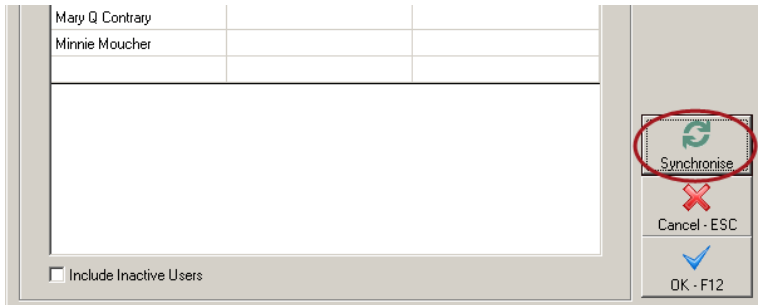
Follow these steps to manually activate RockendSMS Enhanced integration:

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.


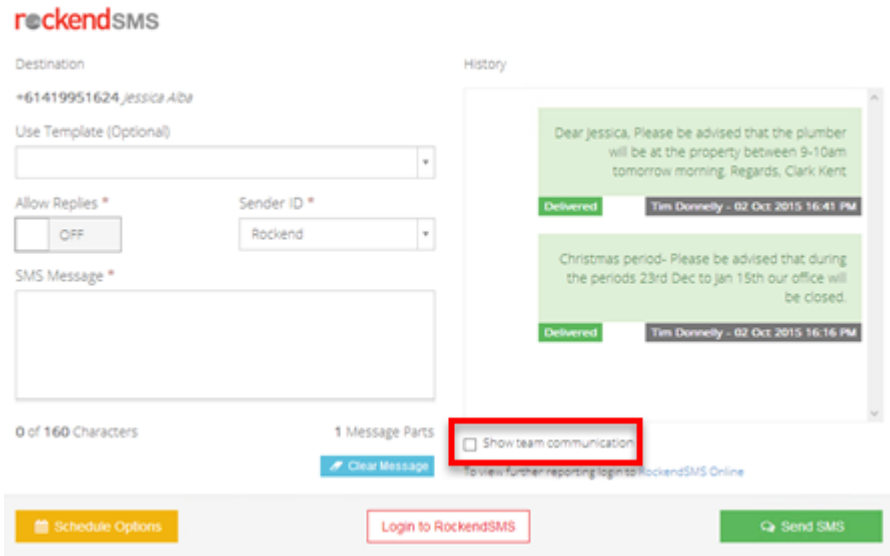



Note: If RockendSMS Configuration has not been activated, messages will be sent using the old RockendSMS functionality.






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.	<p>The RockendSMS Single Message browser loads:</p>  <p>Your conversation history for the selected contact (if available) will display</p> <ul style="list-style-type: none">• Select the Show team communication checkbox to display previous contact by all REST Professional users


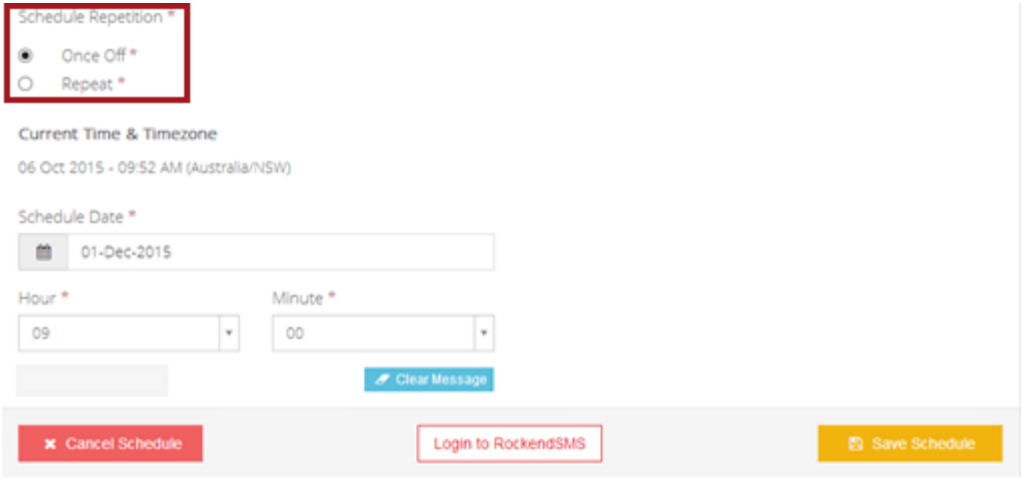
3.	<p>Set Allow Replies to ON if you want to allow the contact to reply to the SMS message:</p> <div> <div> Allow Replies * <div>OFF</div> </div> <div> Sender ID * <div>Rockend</div> </div> </div> <p>Replies can be sent to the Web Inbox (accessed via RockendSMS Online) or to a verified sender's mobile number</p>
4.	<p>Select New Sender ID in the Sender ID dropdown list to create and verify a new Sender ID</p>
5.	<p>Type a message in the SMS Message text box, or select a template from the template list:</p> <div> <div>SMS Message *</div> <div> <div>Dear Jessica, Please be advised that the plumber will be at the property between 9-10am tomorrow morning. Regards, Clark Kent</div> <div> 125 of 160 Characters 1 Message Parts </div> </div> </div> <ul style="list-style-type: none"> If a template is selected, the Sender ID and text can be modified before the SMS message is sent <div>  <p>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.</p> </div>
6.	<p>When the message is ready to be sent, click the Send SMS button:</p> <div> <div>Send SMS</div> </div>
7.	<p>The confirmation screen loads:</p>


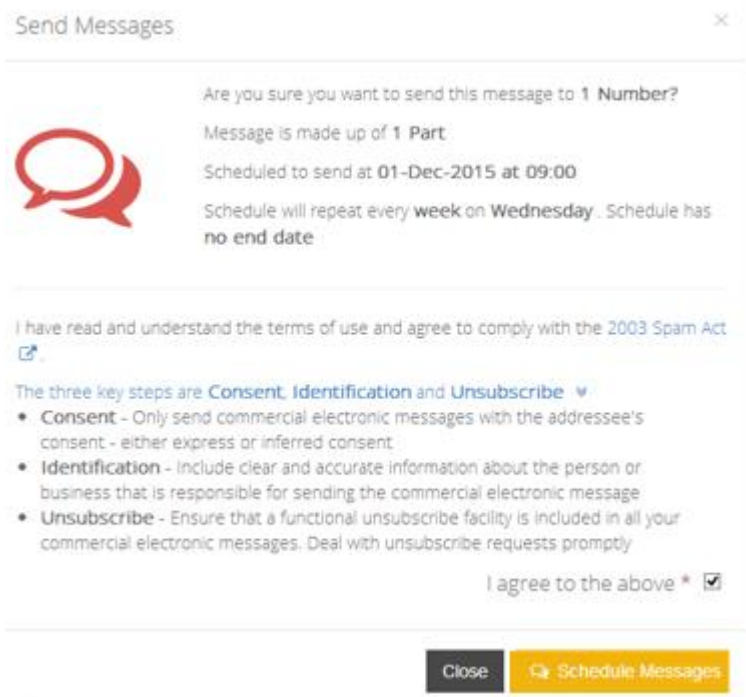
	<div data-bbox="549 163 1238 792"> <div>Send Messages ×</div> <div>Are you sure you want to send this message to 1 Number?</div> <div>Message is made up of 1 Part</div> <div></div> <hr/> <div>I have read and understand the terms of use and agree to comply with the 2003 Spam Act .</div> <div>The three key steps are Consent, Identification and Unsubscribe .</div> <ul style="list-style-type: none"> • 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 <div>I agree to the above * <input checked="" type="checkbox"/></div> <div>Close Send Message</div> </div> <p>Select the checkbox I agree to the above</p> <div data-bbox="360 878 1382 981">  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 </div>
8.	<p>Click the Send Message button. A confirmation message displays:</p> <div data-bbox="517 1066 1267 1361"> <div>RockendSMS - Single Message ×</div> <div> SMS Message to Jessica Alba submitted and added to diary</div> <div>OK</div> </div> <p>Diary entries are created automatically for Single SMS messages to contacts with linked Action Diaries.</p> <ul style="list-style-type: none"> • Solicitor and Insurance messages cannot be added to diary


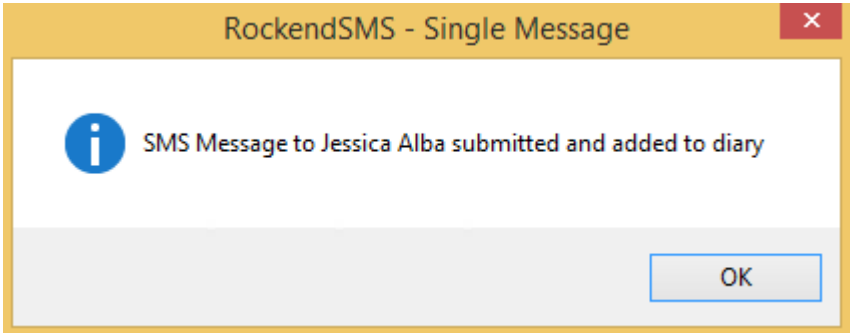
Schedule Options

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: 
2.	The Schedule Screen displays
3.	Select to Schedule Repetition - either Once Off or Repeat: 
	<p>Once Off SMS:</p> <p>Current Time & Timezone 06 Oct 2015 - 09:52 AM (Australia/NSW)</p> <p>Schedule Date *</p> <p>Hour * Minute *</p> <p>09 00</p> <ul style="list-style-type: none"> Select Schedule Date and Time

	<p>Repeat SMS:</p> <p>Schedule Date *</p> <div>  01-Dec-2015 </div> <p>Hour * Minute *</p> <div> <div>09 ▼</div> <div>00 ▼</div> </div> <p>Send on the following days * Send Frequency (Weeks) *</p> <div> <div> <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday </div> <div> <div>1. Send Weekly ▼</div> </div> </div> <p>Finishing Options *</p> <div> <input checked="" type="radio"/> No End * <input type="radio"/> At Date * </div> <ul style="list-style-type: none"> • 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.	<p>The confirmation screen loads:</p>  <p>Select the checkbox I agree to the above</p>

	 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.	<p>Click the Schedule Messages button. A confirmation message displays:</p>  <ul style="list-style-type: none"> • 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

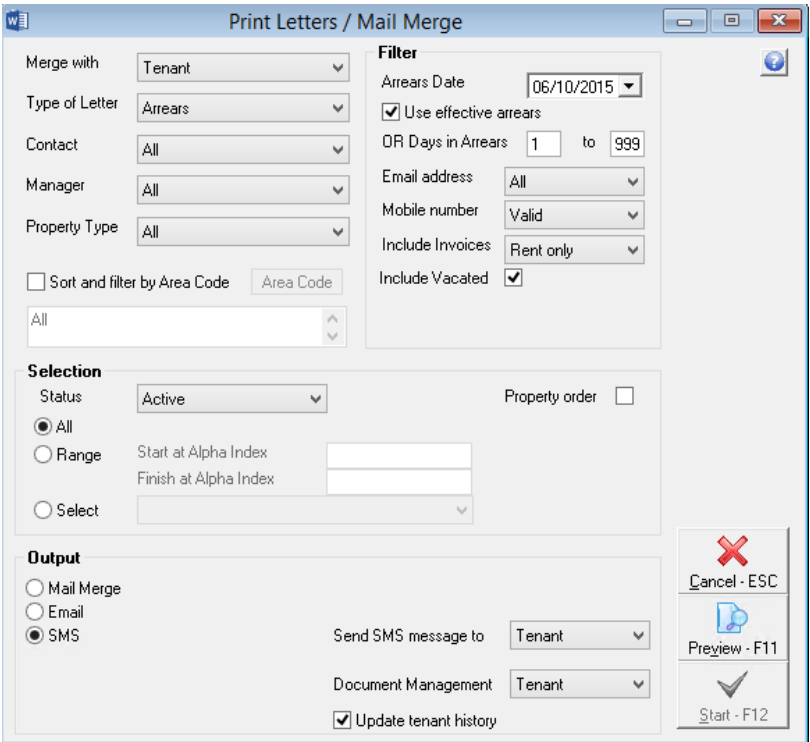
Bulk SMS Messages


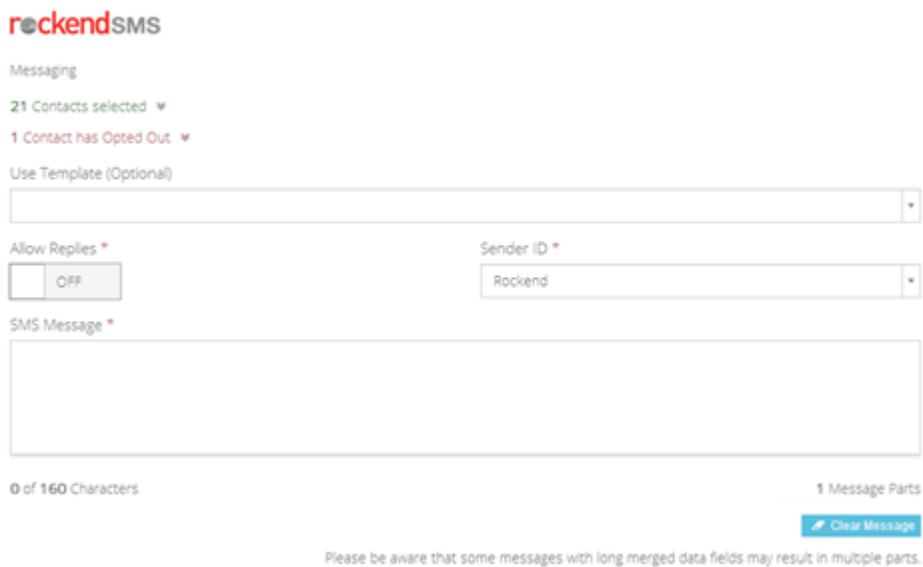
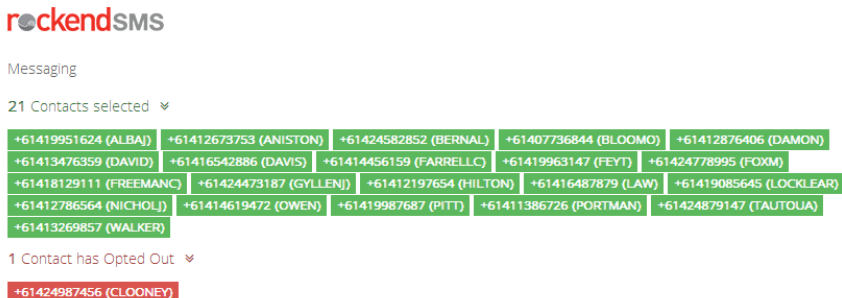
The menu item **Other > Print Letters or Export Data** has been renamed **Print Letters / Mail Merge**.

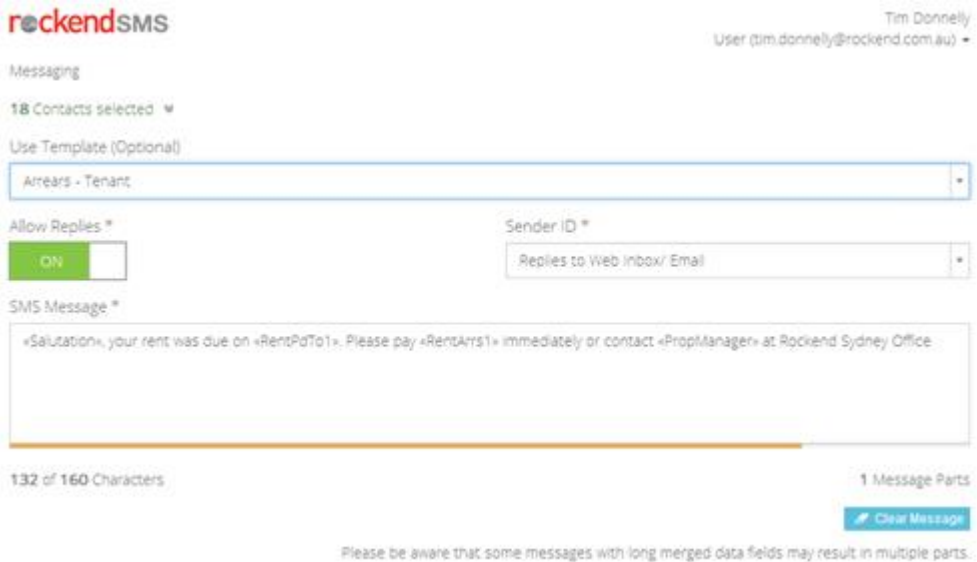
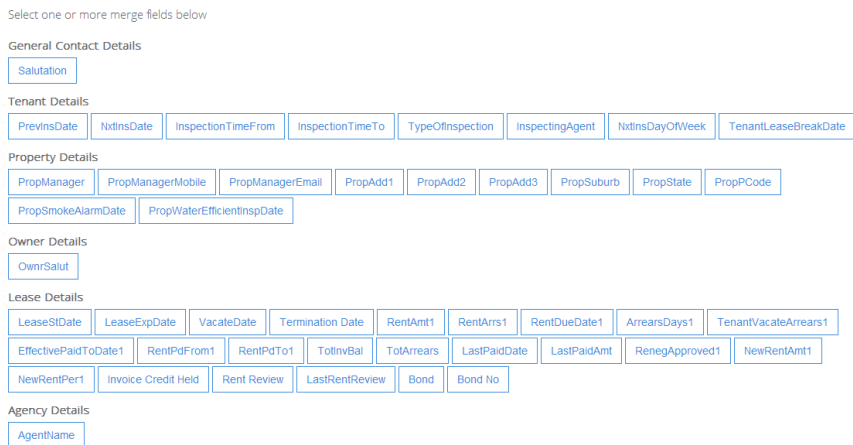
When sending SMS messages to multiple contacts from **Other > Print Letters / Mail Merge**, the new RockendSMS browser screen loads for all REST users configured for RockendSMS Enhanced Integration. If RockendSMS Configuration has not been activated, messages are sent using the old RockendSMS functionality.





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.	<p>Select the Contact type under Merge with:</p>  <ul style="list-style-type: none"> For Tenants, also select the Type of Letter and Contact type e.g. Primary or Repairs
3.	<p>Set all the required Filter and Selection settings to load the contacts who will be receiving the SMS message</p> <ul style="list-style-type: none"> Change the Mobile Number to Valid
4.	Change the Output to SMS

5.	<p>Select from the Send SMS message to dropdown to send the message to the Tenant or Owner</p> <p> Note: These options are only available when Merge with Tenant is selected</p>
6.	<p>If you wish to add the SMS message to Document Management folders, select Document Management</p>
7.	<p>Select the Update Tenant History checkbox for a record of the message to appear on the tenants ledger</p>
8.	<p>Click the Preview button and review the list of contacts</p>
9.	<p>Click Proceed. The RockendSMS Bulk Message screen loads:</p>  <ul style="list-style-type: none"> The Save as Template button will only be visible and accessible to a user set as a RockendSMS Administrator
10.	<p>The contacts selected display at the top of the screen. Expand this section to view the phone numbers that will receive the message:</p>  <ul style="list-style-type: none"> Contacts who previously opted out of receiving SMS notifications will display in red text and will not receive the message
11.	<p>Set Allow Replies to ON if you want to allow the contact to reply to the SMS message:</p>

	<ul style="list-style-type: none"> 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.	<p>There are three options to create a message:</p> <ul style="list-style-type: none"> Type a message in the SMS Message text box Select a template from the template list Create a message using the available merge fields  <ul style="list-style-type: none"> If a template is selected, the Sender ID and text can be modified before the SMS message is sent
14.	<p>To include merge fields in the SMS message, select the required fields from the available merge fields:</p>  <ul style="list-style-type: none"> 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:

	<div data-bbox="566 168 1225 766"> <div>Send Messages</div> <div>Are you sure you want to send this message to 18 Numbers?</div> <div>Message is made up of 1 Part</div>  <div>I have read and understand the terms of use and agree to comply with the 2003 Spam Act.</div> <div>The three key steps are Consent, Identification and Unsubscribe.</div> <ul style="list-style-type: none"> 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 <div>I agree to the above <input checked="" type="checkbox"/></div> <div>Close Send Message</div> </div> <p>Select the checkbox I agree to the above</p> <div data-bbox="375 846 1396 952">  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 </div>
17.	<p>Click the Send Message button. If Document Management was selected, you will be prompted to add the message to document management:</p> <div data-bbox="550 1075 1248 1370"> <div>RockendSMS - Bulk Message</div> <div>  Do you want to put this into Document Management? </div> <div>Yes No</div> </div>
18.	<p>After the message is submitted, a confirmation message displays and the diary will be updated for contact types with linked Action Diaries:</p> <div data-bbox="550 1489 1248 1780"> <div>RockendSMS - Bulk Message</div> <div>  18 SMS Merge messages submitted and added to diary. </div> <div>OK</div> </div>
19.	<p>The RockendSMS browser and the Print Letters / Mail Merge screen closes after the message is submitted.</p>

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 * ☐ OFF

Sender ID * 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

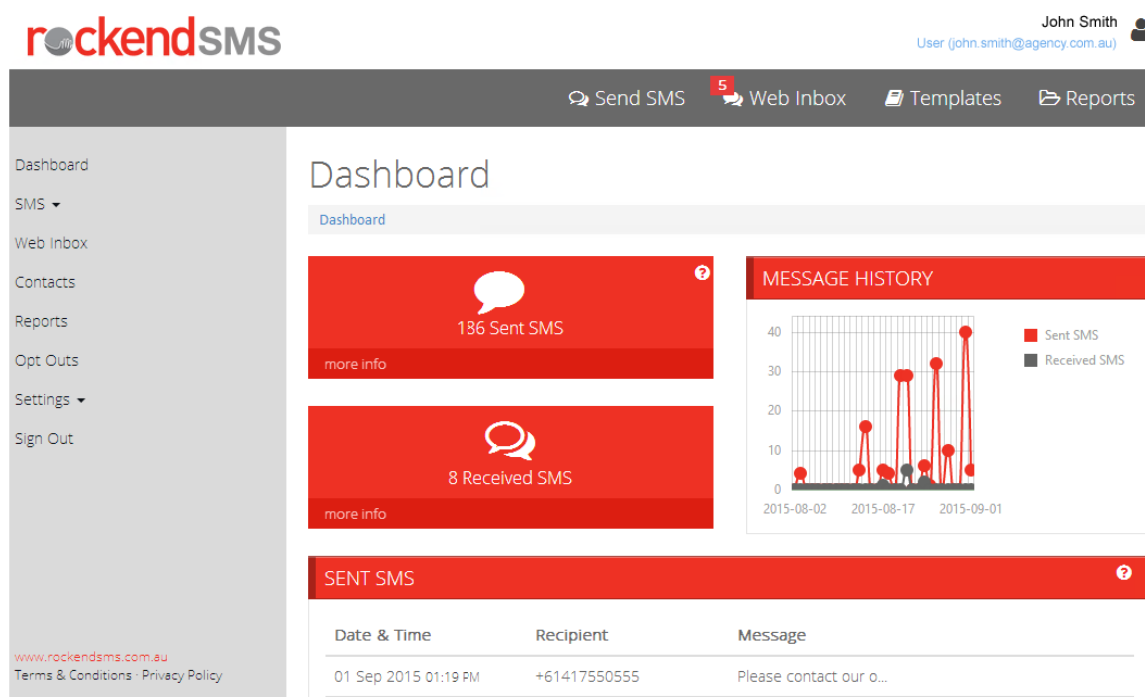
RockendSMS Online

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:

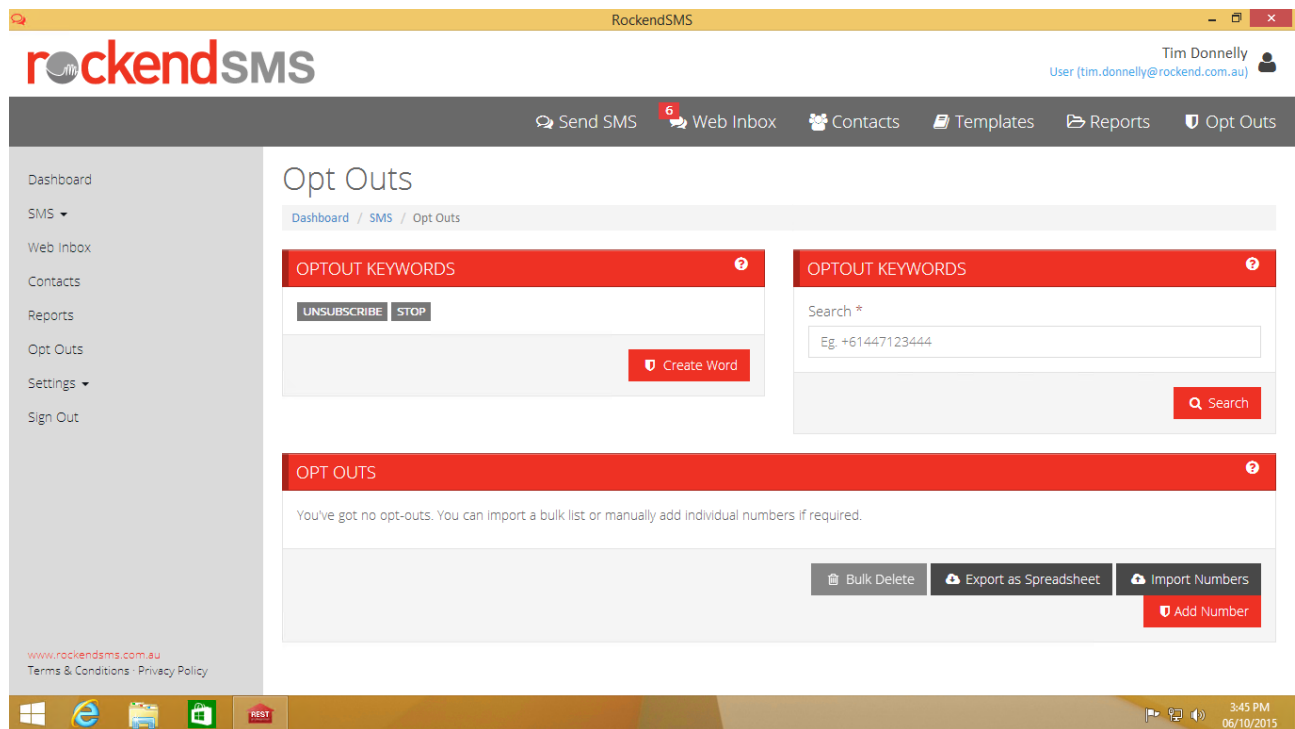
The screenshot shows the RockendSMS web interface. At the top, the user is identified as 'Tim Donnelly' with email 'tim.donnelly@rockend.com.au'. The main area is divided into two sections. On the left is a form to compose a message. It includes a 'Destination' field with the number '+61419951624, Jessica Alba', a 'Use Template (Optional)' dropdown, an 'Allow Replies' toggle set to 'OFF', a 'Sender ID' dropdown set to 'Rockend', and a large text area for the 'SMS Message'. Below the text area, it shows '0 of 160 Characters' and '1 Message Parts'. There are buttons for 'Schedule Options', 'Clear Message', and 'Send SMS'. A red box highlights the 'Login to RockendSMS' button. On the right is a 'History' section showing two sent messages. The first message says 'Dear Jessica, Please be advised that the plumber will be at the property between 9-10am tomorrow morning. Regards, Clark Kent' and was delivered on 02 Oct 2015 at 16:41 PM. The second message says 'Christmas period- Please be advised that during the periods 23rd Dec to Jan 15th our office will be closed.' and was delivered on 02 Oct 2015 at 16:16 PM. Both messages are marked as 'Delivered'.

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 screenshot shows the RockendSMS web application interface. At the top, there's a yellow header bar with the RockendSMS logo and a user profile for Tim Donnelly. Below this is a dark grey navigation bar with icons for Send SMS, Web Inbox (with a red notification badge), Contacts, Templates, Reports, and Opt Outs. A left-hand sidebar contains a list of navigation items: Dashboard, SMS, Web Inbox, Contacts, Reports, Opt Outs, Settings, and Sign Out. The main content area is titled 'Opt Outs' and includes a breadcrumb trail 'Dashboard / SMS / Opt Outs'. It features three red header sections: 'OPTOUT KEYWORDS' with 'UNSUBSCRIBE' and 'STOP' buttons and a 'Create Word' button; another 'OPTOUT KEYWORDS' section with a search bar containing 'Eg. +61447123444' and a 'Search' button; and an 'OPT OUTS' section with a message stating 'You've got no opt-outs. You can import a bulk list or manually add individual numbers if required.' Below this message are buttons for 'Bulk Delete', 'Export as Spreadsheet', 'Import Numbers', and 'Add Number'. The footer of the interface shows the website URL 'www.rockendsms.com.au', links for 'Terms & Conditions' and 'Privacy Policy', and a Windows taskbar at the bottom with system icons and a clock showing 3:45 PM on 06/10/2015.

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

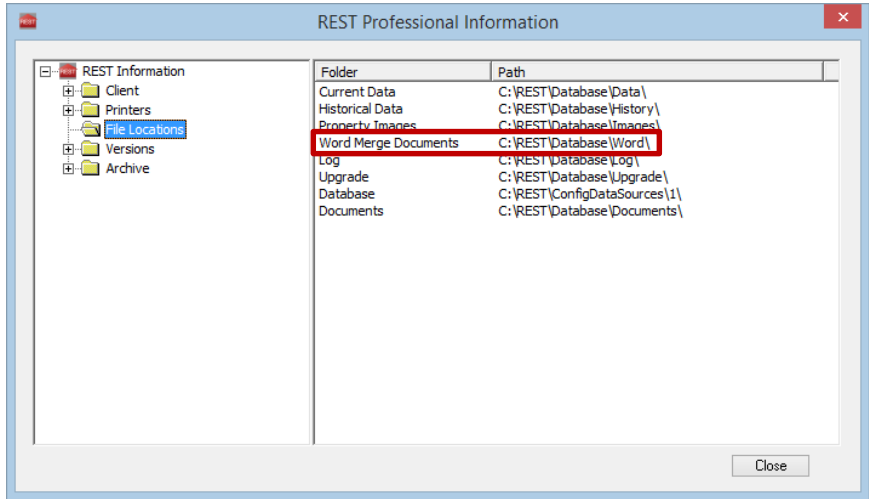
The following default REST Professional SMS templates are available to use when you send a message from RockendSMS and do not need to be converted manually:

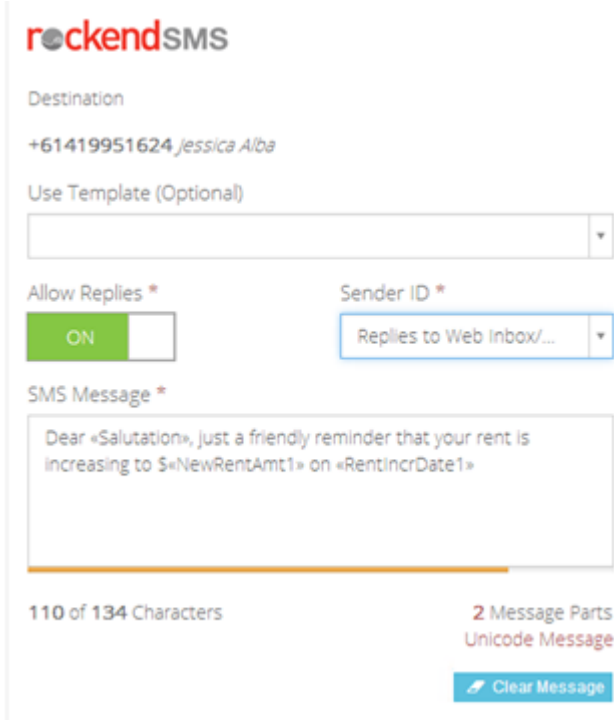
- Arrears Water SMSMerge
- ArrearsSMSMerge
- Inspection FollowUp_Owner SMS
- Inspection FollowUp_Tenant SMS
- Inspection Planner_Owner Invitation SMS
- Inspection Planner_Tenant Notification SMS



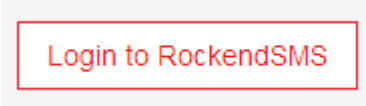
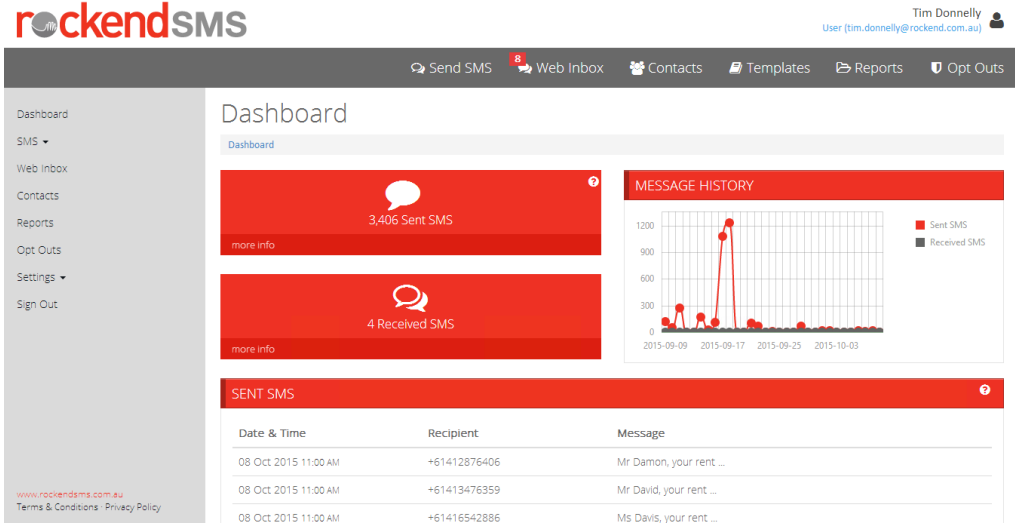
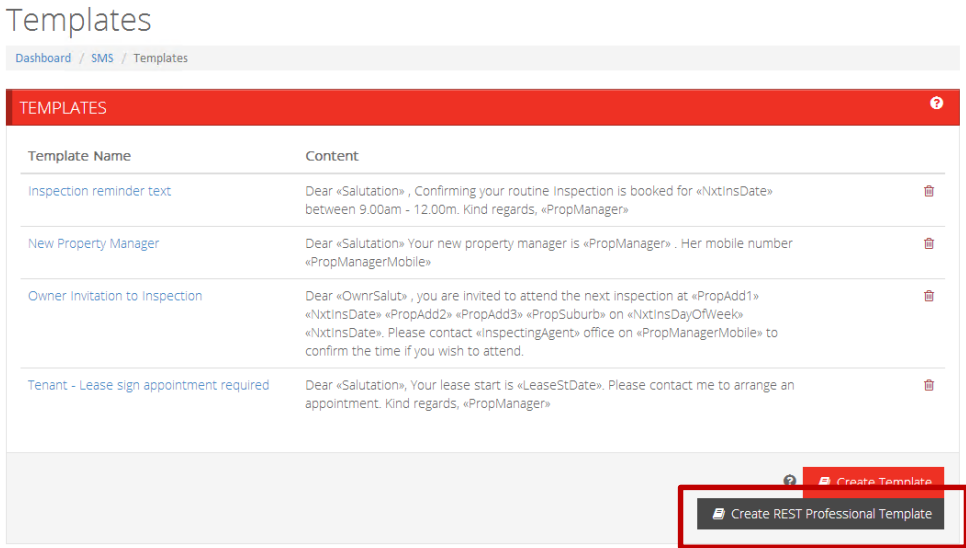
Important: Users with RockendSMS Online Administrator security can create & save new SMS templates.

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

Step	Description
1.	<p>Navigate to your REST Word folder</p> <p>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:</p> 
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:

	<div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> X-Cellphone: «Mobile» X-From-Cellphone: «AgentName» </div> <p>Dear «Salutation», just a friendly reminder that your rent is increasing to \$«NewRentAmt1» on «RentIncrDate1» </p> <ul style="list-style-type: none"> • 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.	<p>Launch RockendSMS – either individual or bulk message screen - and paste (right-click > Paste or Ctrl-V) the copied text into a new template:</p> 
6.	Click Save as Template button

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

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

	<div><h2>Templates</h2><div>Dashboard / SMS / Templates / Create Template</div><div>CREATE TEMPLATE</div><div><div>Name * </div><div>Rent Increase Reminder</div></div><div><div>Allow Replies * </div><div>Sender ID *</div></div><div><div>ON</div><div>Replies to Web Inbox/ Email</div></div><div><div>SMS Message *</div><div>Dear «Salutation», just a friendly reminder that your rent is increasing to \$«NewRentAmt1» on «RentIncrDate1»</div></div><div><div>110 of 134 Characters</div><div>2 Message Parts Unicode Message</div></div><div><div>General Contact Details</div><div>Salutation Mobile</div></div><div><div>Tenant Details</div></div></div> <ul style="list-style-type: none">• 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**:

The screenshot shows the 'User Details' dialog box with the 'User Profile' tab selected. The 'Print Letters / Export Data' dropdown menu is highlighted with a red box, showing the option 'Export Data & above'. Other visible fields include Initials (CK), First Name (Clark), Last Name (Kent), Full name (Clark Kent), Password (xxx), Security Level (System: Statistics/Company Details/Passwords & above, Sales: All Files maintenance & above), Property Manager (checked), Salesperson (unchecked), Sensitive Change Notification (unchecked), Web Advertising Contact (unchecked), Domain ContactID (empty), Toolbar View (Property Management), Outlook Synchronisation (Sync REST Contacts for: None, Sync REST Diary: unchecked), and a right-hand sidebar with buttons: Cancel - ESC, Clear - F2, Delete - F3, Add Mode - F4, Search - F7, and OK - F12.

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.

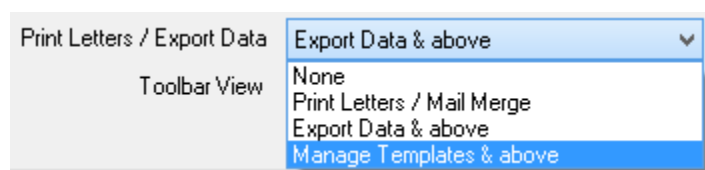
Print Letters / Export Data security levels

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

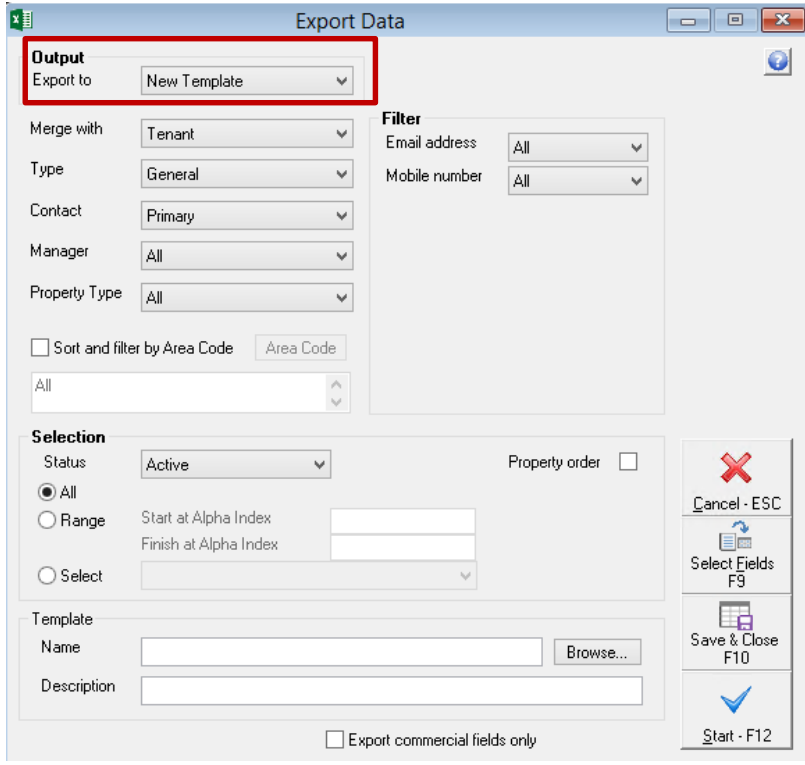
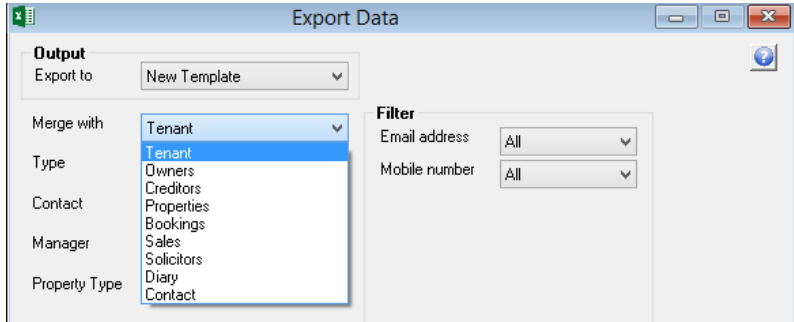
To export templates a Print Letters / Export Data security level of **Export Data & above** is required


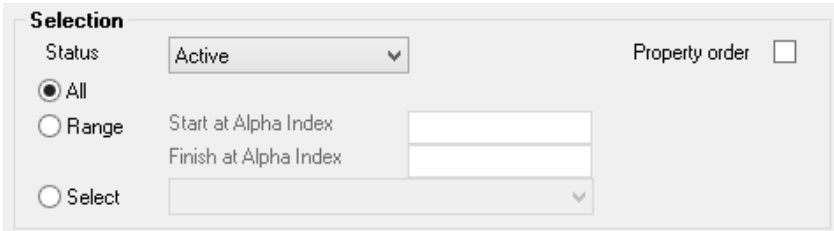

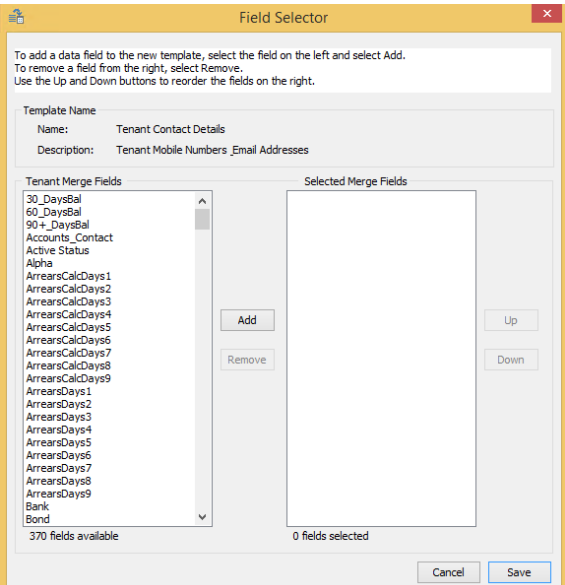
To create new templates and delete existing templates a Print Letters / Export Data security level of **Manage Templates & above** is required

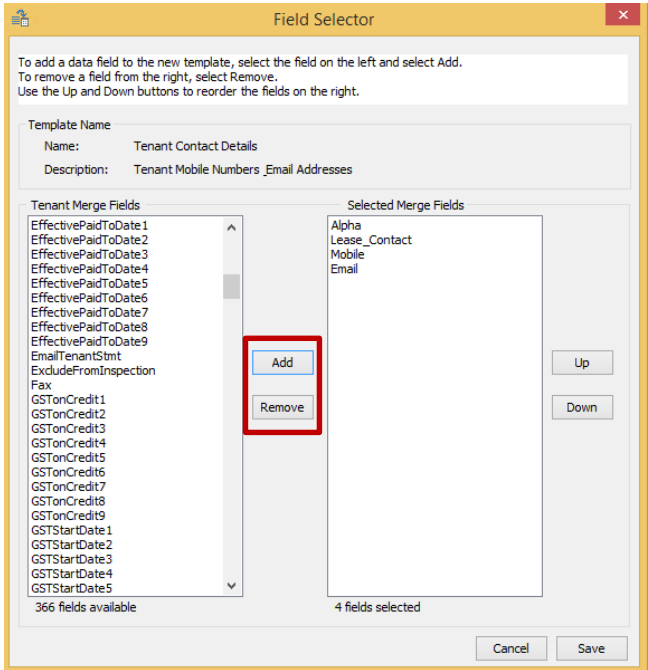


Export to New Template

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.	<p>Select the Output option Export to New Template:</p> 
3.	<p>Select the contact type under Merge with:</p>  <p>Selecting the following contacts types activate additional filters to further define the selection of data:</p> <p>Tenant – Email address and Mobile number</p> <p>Owners – Account type, Email address and Mobile number</p>

	<p>Creditors – Creditor Category, Email address and Mobile number</p> <p>Property – Account types and Sort and filter by Area Code, Email address and Mobile number</p> <p>Bookings – Email address and Mobile number</p> <p>Sales – Sale Group and Sale Status</p> <p>Diary – Start date from, Start date to and Commercial diary checkbox</p> <p>Contact – Sort and filter by Area Code, Email address and Mobile number</p> <p> 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</p> <p>Selecting to merge Contact loads an additional option to select the Contact type</p>
4.	<p>Set Selection options to load the contacts to be included in export:</p>  <p>Selecting the Property Order checkbox sorts the selected records in property order</p>
5.	<p>Enter a Template Name and Description:</p>  <ul style="list-style-type: none"> • Template names must be unique
6.	<p>Click the Select Fields – F9 button. A list of available fields displays for the selected contact type:</p> 

7.	<p>Select one or more merge fields from the available merge fields and click the Add button to move the fields across:</p>  <ul style="list-style-type: none"> • 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.	<p>Select Save to return to the Export Data screen and save the selected merge fields</p>
9.	<p>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.</p>  <p>OR</p> <p>Select Start – F12 to generate the export file and save the template to the Existing Templates list.</p> 

Example of Excel Report:

	A	B	C	D	E	F
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	FOXMM	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		

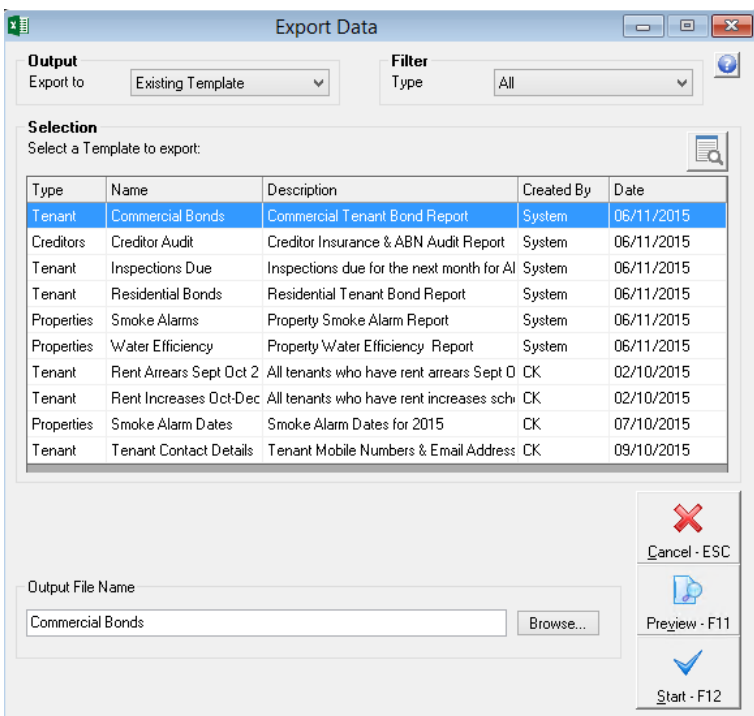

Tenant Contact Details.xls

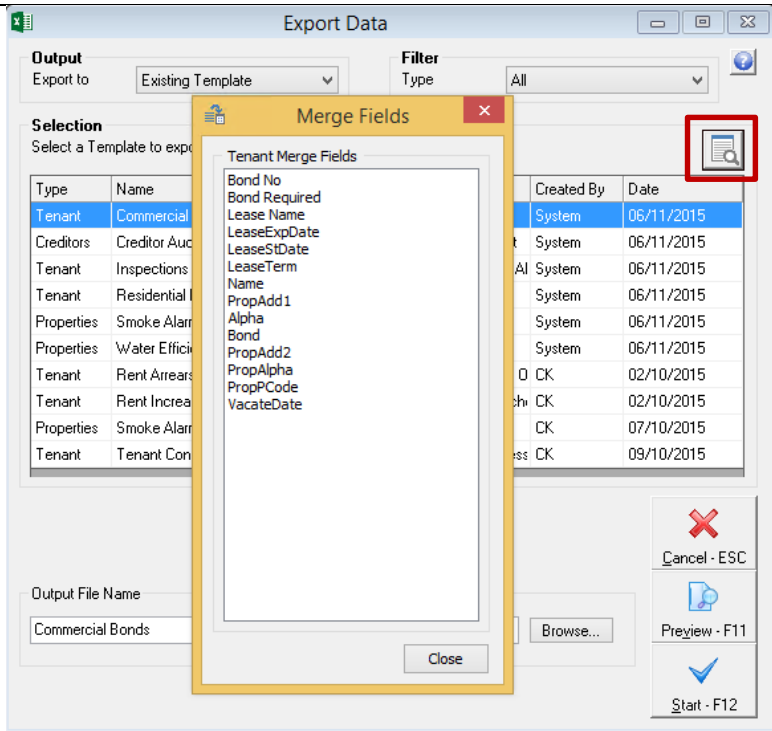
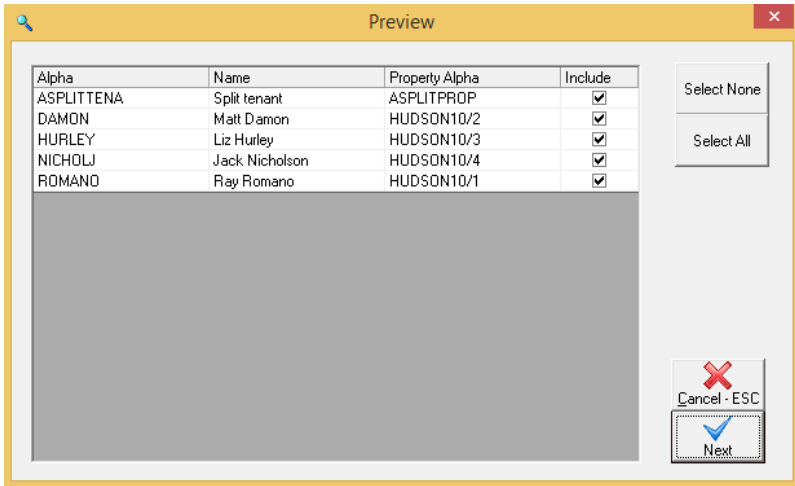
Export to Existing Template

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.	<p>Select the Output option Export to Existing Template:</p>  <ul style="list-style-type: none"> 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:

	 <ul style="list-style-type: none"> Select Close to return to the Export Data screen
6.	<p>Click the Preview button to review the records included in the merge:</p>  <ul style="list-style-type: none"> Records can be excluded on this screen before creating the export file
7.	<p>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</p>
8.	<p>The file opens with the merged records in Microsoft Excel and a copy of the file saves in the specified location.</p>

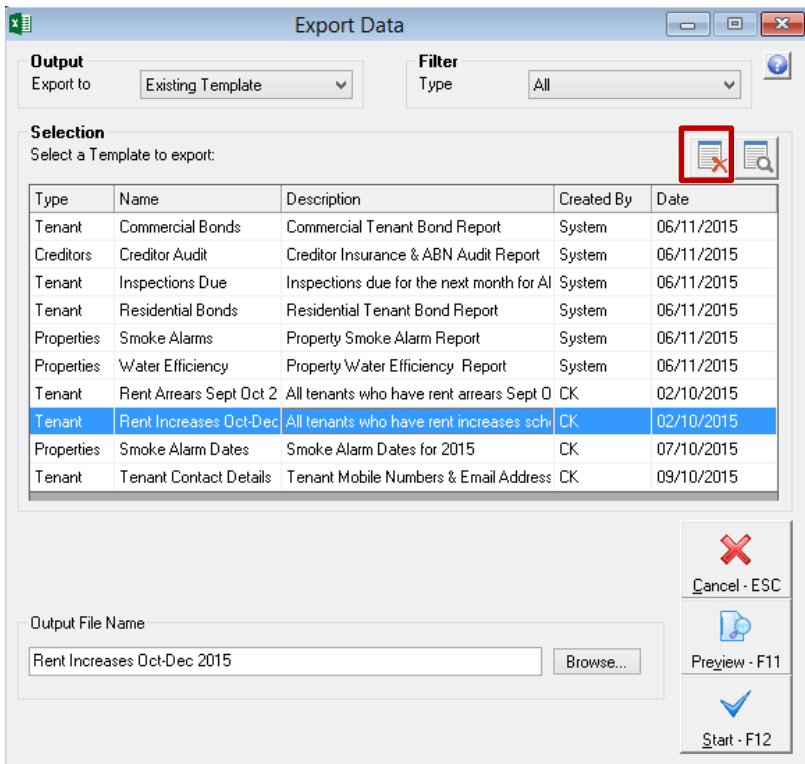
Deleting a Template

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.	<p>Click the Delete button:</p>  <p>A confirmation message displays and the deleted template is removed from the list of available templates.</p>

Energy Efficiency Rating

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

Property Details

Alpha index: [] Active

Address: []

Suburb: [] State: [] P/Code: []

Reminders | Gained/Lost | Maintenance | Inspections | Other |

General | Financial | Advert | Notes | Tenants | Commercial | Strata | Holiday | Insurance | Reg. Payments |

Owner: []

Go to owner

Category

Class: Residential

Reporting order: 1

EER []

Key #: [] Search for key

Alarm Code: []

Area code: []

Property manager: No Managers

Inspecting Agent: No Managers

BDO: No Manager

Repairs: No Manager

Lett Clerk: No Manager

Cancel - ESC

Action - F1

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

Replicate - F8

Last Edits - F9

OK - F12

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

Active Sale Details

Alpha index: Property BOND7 Status: Signed/Exchanged

Vendor | Buyer | Property | Notes | Payment | Financial | Invest | Enquiry | Solicitors | Advert

Property Details

Alpha index: BOND7 Use Vendor Address

Address: 7 Bond Street

Suburb: JAMESVILLE State: NSW P/Code: 2000

Key #: S [] Search for key

EER []

Advertising (Incl GST)

Budget amount: 0.00 Remaining balance: 0.00

Market Plan: []

Vendor Paid Advertising: []

Date	Creditor	Description	Reference	Amount	Action
Total actioned 0.00 Total outstanding 0.00					

Cancel - ESC

Action - F1

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

Replicate - F8

Last Edits - F9

OK - F12

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: <div data-bbox="501 978 1276 1527" data-label="Form"> <p>Vacancy Counter Report</p> <p>Selection</p> <p><input checked="" type="radio"/> All <input type="radio"/> Range Start at Alpha Index <input type="text"/> Finish at Alpha Index <input type="text"/> <input type="radio"/> Select <input type="text"/></p> <p>Advanced</p> <p>Manager <input type="text" value="All"/> Class <input type="text" value="All"/> Bedrooms <input type="text" value="0"/> to <input type="text" value="99"/> <input type="checkbox"/> Sort by Bedrooms Vacancy Date <input type="text" value="09/10/15"/> <input type="checkbox"/> Sort and filter by Area Code Area Code <input type="text"/> <input type="checkbox"/> Include Application Taken <input type="checkbox"/> Print Headline Only <input type="checkbox"/> Print Letterhead <input type="checkbox"/> New Page per Type <input type="checkbox"/> Sort by Price Descending <input type="checkbox"/> New Page per Area Code <input checked="" type="checkbox"/> Print Type Header <input type="checkbox"/> New Page per Bedroom</p> <p>Font Select - F2 Print - F12 Preview - F11 Export - F10 Cancel - ESC</p> </div>
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.

