

## How to Add a Sale Card in REST Professional

REST Professional allows you to add sale records to your database, keeping all the relevant information relating to that sale in the one card from newly listed through to completion.

This document will guide you through the steps of adding a sale in REST from entering the Vendor, Property and Purchaser details, through to setting up the vendors and buyers solicitors and financial details.

1. Go to Files > Sales > Sale or click on the

icon and click on Add Mode F-4

- 2. Status Select a sales Status from the drop down menu from Appraisal to Completed. NOTE: There are additional sales statuses in Version 11.0.04 and above.
- 3. Click onto the Vendor tab and add the details, followed by the Buyer Details (if applicable)

Cancel
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Clear
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pha index Property ·		Status	•
		ADD MODE	🛯 🔛 🧹
Vendor Buyer Property No	ites Payment Financial	Invest Enquiry Solicitors Advert	Cancel - ESC
Buyer Contact Details			
Alpha index			Action - F1
Name			
Address			Clear - F2
Suburb	State	P/Code	Delete - F3
Salutation		W	+
Home			Add Mode - F
Work.			e,
Fax			Search - F7
Mobile	8		
E-mail			Replicate - Fl
Tax file number			Last Edits - F
			Last Edits - P

- Alpha index: Enter up to the first 10 characters of the vendors and buyers surname. This field must start with a letter, not a number and should not contain any punctuation or blank spaces.
- Name: Enter up to 40 characters. The name and address fields should be entered in the same format that you want them to be printed on the statement at settlement.
- Email address: Enter the email address for this vendor and buyer.. If you email statements to a vendor this field must contain a valid email address.
- 4. Click on the Property tab and complete the details

/endor Buyer	Property N	otes Payment Fina	ADD MODE	Cancel - E
Property Details				
Alpha index		Use	Vendor Address	Action - F
Address	_		<u>م</u>	
Suburb		s	itate P/Code	Clear - F.
Advertising (Incl	(120			*
	u51)			Delete - F
Budget amount	0.00	Bemaining	n balance 0.00	
Budget amount Market Plan	0.00	Remaining	g balance 0.00	-
Market Plan		Remaining	g balance 0.00	Add Mode
Market Plan Vendor Paid Ad	lvertising		+	Add Mode
Market Plan Vendor Paid Ad			Reference Amount Actioned Charged	Add Mode Search - F
Market Plan Vendor Paid Ad	lvertising		+	Q
Market Plan Vendor Paid Ad	lvertising		+	Q
Market Plan Vendor Paid Ad	lvertising		+	Search - F

- Use vendor address: If the vendor is selling the property where they live simply click on the button 'use Vendors Address' note: you will have to enter the Alpha index.
- Alpha index: Enter up to the first 10 characters of the property address. This field must start with a letter, not a number, and should not contain any punctuation or embedded blank spaces. NOTE: As this field is used throughout the system to find the property you should make the alpha index as complete as possible. It is recommended that you use the first 4 characters of the street name, followed by the street number
- Advertising (incl GST): You may enter the advertising and marketing expenses that are planned for this sale, the expenses may be ticked as actioned when the item has been done. NOTE: When you tick the item to be charged REST creates an outstanding disbursement
- Budget amount: Enter the advertising budget for this sale, when you enter the advertising expenses in the grid below, REST will remind you if you go over the budget.
- Remaining balance: This reflects the budget amount minus the amount of advertising entered below
- Market plan: Enter the name of the marketing plan for this sale (if applicable)
- Vendor Paid Advertising: You should tick this option if the vendor is paying up front for the advertising, if the vendor is not pre-paying and you will account for the advertising as part of the settlement then do not select this option. NOTE: When you select this option, you may create disbursements for the advertising and the vendor invoice reports the expenses when they are charged along with any receipts and disbursements that have been posted with the 'type' Advertising. If you have not selected this option you may not create disbursements in REST and the vendor invoice reports the expenses when they are actioned. Once you have selected the option as pre-paid, you may not change it
- 5. Notes Tab Remarks: Depending on system options selected, these remarks may be displayed every time you access the sale or post a transaction to the sale.

Active Sale Details		- 0 💌
Alpha index Property  Vendor   Buyer   Property Notes   Payment   Financial   Inv	Status ADD MODE vest Enquiry Solicitors Advert	Cancel - ESC
Created		R
Sale File Notes		Action - F1
Enter ant notes that you want to keep about this sale here	*	Clear - F2
		Delete - F3
		Add Mode - F4
		Q
		Search - F7
		Replicate - F8
Remarks		0
These fields are used for refrence or to record		Last Edits - F9
any particular requirements for the sale.		✓
		OK - F12

6. Click on the Payment tab and complete all relevant details

🖗 Active Sale Details	- • •
Alpha index Property	
ADD MODE	Cancel · ESC
Vendor Payment Details Payment method Auto deposit (EFT)	Action - F1
Account number BSB -	Clear - F2
Show account on statement	Delete - F3
Buyer Payment Details Payment method Auto deposit (EFT)	Add Mode - F4
Account number BSB ·	Search - F7
Show account on statement	Replicate - F8
	0K - F12

- Vendor Payment Details and Buyer Payment Details: Select from the dropdown box, the preferred payment method (cheque or auto deposit (EFT), the entry of the payment method information is optional here and may be entered or overwritten when posting the payment.
- 7. Click on the Financial Tab and enter all relevant details

Active Sale Details			
Alpha index Property	•	Status  ADD MODE	
Vendor Buyer Proper	Notes   Payment Financial Inve		Cancel - ESC
Sale Details Group 🗛	•		Action - F1
Listing salesperson	Selling sales	person 🔹	Clear - F2
Followup date/	/_ Exchange date _/_/_	Settlement date _/_/_	*
Financial Purchase price	\$0.00 Admin Fee(Incl	GST) \$0.00	Add Mode - F4
Commission(Incl GST) Deposit required	\$0.00	Charge bank fees	Q
Conjunction Details Conjunction sale			Search - F7
Agent name	Set as %		Last Edits - F9
			0K - F12

- Group: You may use the group code to group together certain sales so so that they may be reported on seperately: eg: R group for residential and C group for commercial
- Listing and Selling Salesperson: Choose the drop down menu and select a listing and selling agent
- Sale Start month: this should reflect the listed month
- 8. Click on the Invest tab and enter the relevant details

Active Sale Details	
Alpha index Property   Status  ADD MODE	
Vendor   Buyer   Property   Notes   Payment   Financial Invest Enquity   Solicitors   Advert   Investment Account	Cancel - ESC
Bank name Bank branch Bank address	Action - F1
BSB - Phone Select bank	Diear - F2
Account name Account number	Delete - F3 Add Mode - F4
	Search - F7
	Replicate - F8
	Last Edits - F9
	0K - F12

- Bank Name: If the deposit is to be invested in an interest bearing deposit account then enter the
  account information in here. If the bank details have already been set up through Files > Sales >
  Bank then clickl on Select Bank.
- 9. Click on the Enquiry tab. This tab self updates when receiping and disbursing monies in REST. It reflects the balances held in the trust for advertising, deposit/sundry and investment accounts.

lpha index Prop	• vhe		Statu		-	
				ADD	MODE	
Vendor Buyer	Property Notes	Payment Fina	ncial Invest Er	quity Solicitors	Advert	1 64
		Advertising	Dep/Sundry	Investment	Total	× •
Plus:-	Deposits		0.00	0.00	0.00	Cancel - ESI
	Interest		0.00	0.00	0.00	
	Sundry	0.00	0.00	0.00	0.00	Action - F1
	Journal Credits	0.00	0.00	0.00	0.00	
Less:-	Disbursements	0.00	0.00	0.00	0.00	Clear - F2
	Commissions		0.00	0.00	0.00	
	Bank Charges	0.00	0.00	0.00	0.00	*
	BAD Tax	0.00	0.00	0.00	0.00	Delete - F3
	Journal Debits	0.00	0.00	0.00	0.00	
	GST Paid	0.00	0.00	0.00	0.00	Add Mode - F
GS	T on Commission		0.00	0.00	0.00	
	Trust Balance	0.00	0.00			Search - F7
	Total Balance		0.00	0.00	0.00	ED.
	[	Show advertising balances	Show outst balance		outstanding voices	Replicate - Fl
						Last Edits - F
						Loss Luko - I

10. Click on the Solicitors Tab and complete the relevant information

🖗 Active Sale Details	- 0 🗙
Alpha index Property	
	<b></b>
Vendor Buyer Property Notes Payment Financial Invest Enquiry Solicitors Advert	_
Vendor Solicitor	🗙
Solicitor alpha Search Detach	Cancel - ESC
	∎∕
	Action - F1
	Clear - F2
Buyer Solicitor Solicitor alpha Search Detach	Delete - F3
Solicitor alpha Search Detach	-
	Add Mode - F4
	Search - F7
	Li I
	Replicate - F8
	Last Edits - F9
	0K - F12

- Vendor and Buyer solicitor: enter the Vendors and the Buyers solicitors here. If the solicitors have not been entered, enter the solicitor through Files > Sales > Solicitor
- 11. Click on the Advert tab and enter the relevant information

haindex Property	-	Status	•
fendor   Buyer   Property   N Advertisement Heading Description	otes   Payment   Financial	ADD MODE	
Photographs - page 1		Floor plan	Cerreral
Main .	Aux 1	+ Floor plan	Add Mode -1
Аик 2	Ашк З	Photos next	Replicate - F

The advertising tab displays the advertising details and photos for the property. The information and photos stored here are used in the window cards and web advertising.

12. Click on OK-F12 to save the sale record.

22/09/2021 6:55 pm AEST