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REST Professional Version 12.5.05 Release Notes

Version 12.5.05 - General Release

Inspection Workflow (New Feature)

Sorting now available on Column Headers	Data can now be sorted in ascending/descending order by selecting the column headers on each of the first 3 tabs of Inspection Planner and Inspection Follow Up. When sorted by Next Inspection Date, inspections will be sorted by the From Time.
Help Icon	Selecting the Help icon on the Inspection Planner Configuration screen, Inspection Planner screen and Follow Up screen will now load the relevant topic in the REST Professional Help File.
Bulk Status Update	An option has been added to the Schedule and Review & Update tabs that will allow bulk updating of the status of inspections in the grid. Previously, the inspection status had to be changed manually for each inspection
One Off Inspection Type	A new inspection type of One Off Inspection is available in Inspection Planner and Follow Up. One Off Inspections scheduled and completed through Inspection Planner and Follow Up will not affect routine inspections.
Inspection Notification Merge Templates	The upgrade to V12.5.05 of REST will include sample templates for Owner and Tenant Notifications sent from Inspection Planner and Follow Up. Samples include Letter, Email and SMS templates. These templates were designed to be used with the new Inspection Workflow only and should not be used for single or bulk merges from REST
Inspection Notifications with ADL Forms	When inspection letters are merged to ADL Forms from Inspection Planner and Inspection Follow Up, the document path on the Merge & Send screen will display as ADL Forms.
Inspection Notifications with REI Forms Live / Realworks	When inspection letters are merged to REI Forms Live/Realworks from Inspection Planner and Inspection Follow Up, the document path on the Merge & Send screen will display as Forms Live or Realworks.
Exclude from Inspection option	An option has been added to allow a property to be excluded from inspections. The existing option to exclude a tenant from inspections is still available, allowing users to exclude a property from inspections on a property or tenant level.
Inspection Comments field	The Inspection Comments field will now allow up to 200 characters to be entered; the previous limit was 40 characters. All 200 characters will be copied when diary items are created for inspections scheduled via Inspection Planner. The Tenant Inspection Report will continue to display 40 characters. Multiple lines of text can be entered by using the ENTER keyboard key.
Outgoing Inspection Type	When selecting the Inspection type of Outgoing, the Next Inspection Date will be disabled and a new date selector will be available.
Inspection Time	The tenant's previous inspection time (previously saved in Tenant Details > Reneg/Inspect > Inspection time) will display on the first line of the Inspections Comments field after upgrading to V12.5.05. The previous inspection time, followed by the Inspection Comments, will display on the Inspection Report available from the Reports > Tenant menu.
Property Detail Report	The Inspecting Agent's initials now display for each property listed on the Property Detail report.
Inspection Update Wizard	The Inspection Update Wizard has been removed from the Files > Inspections menu, but it still available from the Wizard Hat icon in the REST Toolbar.
Inspections Global Changes	Global Changes now includes an Inspections tab to allow bulk changes to Tenant Preferred Communication Methods for inspection notifications.

Inspection Notification	An issue when merging an owner email from the Inspection Notification screen in Planner and Follow Up has been resolved.

Agency Fee Management (New Feature)

Reverse Management Fee on Lettings	A warning message will now display in the Agency Fee Configuration screen when Letting Fee is selected to be included on a database that has Reverse management fees on lettings selected in System Options. The warning reads: Management fees will not be reversed when Letting Fees are charged via Agency Fees.
Agency Fees Processed Report	A report of processed agency fees is now available to be printed from the Agency Fees screen. The report can be ordered by Property or Fee.
Agency Fees load of Internal Accounts	A change has been made in Agency Fees to load the Internal Account name from the internal owner file, not from the Internal Accounts tab in Company details; this is consistent with how Internal Accounts are loaded in the Agency Fee Configuration screen.
Help Icon	Selecting the Help icon on the Agency Fee Configuration screen and the Agency Fees screen will now load the relevant topic in the REST Professional Help File.

New Look Property Vacancy Counter Report

New Property Vacancy Counter Report functionality	• The new report has been modified to display properties with a class of Holiday in the same manner as the old report. • The new report will now display properties with tenants vacating in the future in the same manner as the old report. • The new report will now display properties whose tenants have a Lease break date in the same manner as the old report. • The new Property Vacancy Counter Report has been modified to display properties with vacated and current tenants in the same manner as the old report.
New Property Vacancy Counter Report changes	• Validation has been added to the Vacancy Date entered on the new report selector screen; a prompt will display when an invalid date is entered. • Changes have been made to improve the display and layout of Company Logos on the report. • Changes have been made to improve the load times and general performance when using the new Property Vacancy Counter Report on large databases. • The F12 keyboard shortcut key on the Print button of the new Property Vacancy Counter Report will now launch the Printer selector screen. • When the Property Vacancy Counter Report was generated and there were no properties to display an error occurred. This has now been resolved and a blank report will display. • If a property has no property type in Advert > Detail, the property will not display on the report.
Sort and Filter	An option is now available to sort and filter the new Property Vacancy Counter Report by Bedrooms.

Trust Receipt Enhancements

Received Date	• The Banking Details screen that displays when creating Trust Receipts has been modified to include the Received Date. The Received Date will default to the REST System Date and can be changed before saving the receipt. The new field will be available for all Australian States. • The layout of Trust Receipts has been modified to display the date of the receipt as well as the Received Date. • The Received Date can be added for Trust Receipts created automatically as part of processing other rent transactions in REST ie. Tenant Download and Tenant Direct Debit. • The Received Date field will be the same as the REST System Date for Trust Receipts created automatically as part of Tenant Invoice Credit Allocation.
Full User Name Displaying	Trust Receipts for all Australian States have been modified to display the Full User Name followed by the User Initials underneath the signature line.
Trust Receipts	Receipts created in earlier versions of REST and reprinted in Version 12 did not display all 60 characters of the Licensee Name. The issue has been resolved.
Tenant Receipt Comments	An issue with Tenant Receipt Comments not displaying on receipts created automatically using Tenant Download has been resolved.

Other Changes

Trust Account Unique Identifying Number	To meet legislation requirements, NSW databases can now record their Trust Account Unique Identifying Number in Company Details, next to the Trust account number. The field is labeled Trust UID.
Property Details Report	An issue with the Property Details Report not updating managers correctly after their initials were changed has been resolved.
Purge Records	• A change has been made to include transactions created via the new Inspections module and the Agency Fees screen when using the Purge Records Utility to fix Owner and Tenant Master Files with blank records. • A change has been made to relink outstanding disbursements when using the Purge Records Utility to fix Owner Master Files with blank records. • A change has been made to include Inspection History when using the Purge Records Utility to fix Property and tenant Master Files with blank records.
Property Maintenance Jobs	The name of the Inspecting Agent now displays on Property Maintenance Jobs, underneath the Property Manager’s name.
Owner Income & Expenditure Reports	An issue with the method used to calculate GST when Tenant Invoice Credit transactions of $0.00 were included in the GST Summary of Owner Income & Expenditure reports has been resolved.
Owner Income & Expenditure Reports	A layout issue when the header was the only item on the Owner Income & Expenditure report when viewed by Property Breakdown has been resolved.
Creditor Trial Balance Reports	In some cases, generating the Creditor Trial Balance for historical months loaded the report for the incorrect year. The issue has been resolved.
Outstanding Disbursements by Creditor Report for Sales databases	In some cases, the Outstanding Disbursements by Creditor Report for Sales Only databases incorrectly linked all outstanding disbursements to the most recently used Sale and Creditor. The issue has been resolved.
Creditor Payment tab	An issue with the REST DEFT Creditor checkbox being disabled when new and existing Creditors were configured with the payment method of BPAY has been resolved
Direct Connect	In some cases, the Direct Connect Company Level Password was reset when upgrading to V12.0.09 of REST. The issue has been resolved.
Tenant Details	In some cases, when loading Tenant Details the cursor defaulted to the Lease Name instead of the Alpha Index. The issue has been resolved.
Realestate.co.nz	• The Realestate.co.nz suburb list has been updated to include new suburbs. • A change has been made to allow hyperlinks for virtual tours to display correctly on the Realestate.co.nz website.

REST Help menu items	Some changes have been made to the items available under the Help menu. Knowledgebase is now the first item and Activity List has been moved down in the list.
Inspection Manager	The following fields are now included in REST data synchronized to Inspection Manager: Inspecting Agent name and email, Inspection Time From and To, Inspection Type, Inspection Status, and One Off and Outgoing Inspection dates.
Owner Withhold Funds	Previously the Owner Withhold Funds calculated the uncleared funds amount using the Computer Date. This has now been changed to use the REST system date.
Audit Report	When processing the Cash Book Audit Report and the option to 'Print File Changes' is selected, the tenant mail merge letter name would not appear on the ledger. This has now been resolved.

Version 12.5.04 – Internal Release Only

Version 12.5.03 – Beta Release

Upgrade	As a result of a new field introduced in V12.5.02, tenant transaction history files were corrupted during the upgrade which affected Tenant Paid From dates. This issue has been resolved.
Upgrade and Backup	In some instances, history files were not backed up during the upgrade to V12.5.02. This issue has been resolved.

Version 12.5.02 - Beta Release

Inspection Workflow (New feature)

Inspection Planner	REST Professional Version 12.5 introduces the ability to plan your upcoming property inspections in one screen. The Inspection Planner will allow you to review and schedule inspections, send notifications to tenants, invite owners, update diaries and create a history of scheduled inspections. Please refer to the Inspection Planner Setup and Use guide included with your Beta documentation for detailed instructions on planning your inspections in 5 easy steps.
Inspection Planner Configuration	The Inspection Planner Configuration screen allows you to store some of the default load settings when using the Inspection Planner and Inspection Follow Up. The Inspection Planner Setup and Use guide included with your Beta documentation includes configuration guidelines.
Inspection Follow Up	Inspection Follow Up allows you to review and finalise your completed property inspections in one screen. Using Inspection Follow Up, you can review, update and finalise completed inspections, reschedule inspections, advise owners and tenants of the completed inspection, edit and create maintenance jobs, update diaries, charge Inspection Fees to owners and create a history of completed inspections. This feature includes most of the functionality of the existing Inspection Update Wizard in REST, with added features to streamline the process. Please refer to the Inspection Follow Up Setup and Use guide included with your Beta documentation for detailed instructions on completing your inspections in 5 easy steps.
Property Inspecting Agent	Property Details now includes a new field for Inspecting Agent. This field will default to the Property Manager for each property when upgrading to Version 12.5 of REST. A different Property Manager or Other Manager can be assigned.

Property Inspections tab	Property Details now includes a new tab named Inspections. The Frequency and Last Inspection Date previously saved on the General tab will display here.
Inspection History Table	Inspection History displays a record of scheduled, completed and cancelled inspections finalised through Inspection Planner and Inspection Follow Up. Inspections that are cancelled manually will also be recorded in the Inspection History.
Renegotiation Tab	The Reneg/Inspect tab has been renamed to Renegotiation, and inspection details no longer display here.
New Inspections Tab	Tenant Details now includes a new tab named Inspections. Next Inspection Date and Comments previously saved on the Reneg/Inspect tab will display here.
Inspection Time	Two new fields are available in the Inspections tab to record Inspection Time From and To. Both fields will default to 12:00AM when upgrading to V12.5 of REST, and Inspection times previously saved on the Reneg/Inspect tab will no longer be available.
Inspection Type	A new field for Inspection Type is available on the Inspections tab. The default inspection type when upgrading to V12.5 will be Routine. When a new tenant is added, the inspection type will default to Ingoing. Inspection types can be set manually, and some types will be updated automatically when using the Inspection Planner and Follow Up.
Preferred Communication	A new field for Preferred Communication is available on the Inspections tab. The default Preferred Communication method when upgrading to V12.5 will be Letter. Other communication methods available are Email and SMS. When using the Inspection Planner and Follow Up, the Preferred Communication method will default automatically tenants selected to receive inspection notifications.
Inspection Status	A new field for Inspection Status is available on the Inspections tab. The default inspection status when upgrading to V12.5 will be Pending. When a new tenant is added, the inspection type will default to Ingoing and the status will default to Complete. Inspection status can be set manually, and some status settings will be updated automatically when using the Inspection Planner and Follow Up.
Global Changes	An option is available on the Move Portfolio tab to Change Inspecting Agent. This will allow you to make bulk updates for the role of Inspecting Agent.
User Details	You will have an option to move the Inspecting Agent portfolio to a different user for existing Inspecting Agents set to Inactive or Deleted.
Tenant Inspection Report	The Tenant Inspection Report now includes the Inspecting Agent from Property Details and the Time From and To from Tenant Details.
Mail merging	REST Version 12.5 includes a number of new merge fields that can be included when creating new owner and tenant notifications. Please refer to your Beta documentation for more information on using the new merge fields with the new Inspections Module.

Owner Portals with Inspections

Owner Portals	If you use Owner Portals, a new option will be available in the REST Communicator Configuration Tool to activate an Inspections tab on Owner Portals. The Property Inspection History will display on the new tab. Download the Owner and Tenant Portals with REST Communicator Setup and Use guide for more information.

Agency Fee Management (New feature)

Agency Fees	REST Professional Version 12.5 introduces the ability to process Letting Fees and other charges to owners for new tenancies on a single screen. Two new screens have been introduced in REST: • Other > Utilities > Agency Charges Configuration • Transactions > Agency Charges

Agency Fee Configuration	This screen allows you to configure all the fees you wish to charge for new tenancies. All fees configured here will be available to be charged through the Charge Agency Fees screen under the Transactions menu. Please refer to the Agency Fee Configuration and Charges Setup and Use guide for further details.
Agency Fees	All properties whose tenants have an Original Lease Date within a specified date range will be available to charge Agency Fees for new tenancies that have been included in the Agency Fee Configuration screen. Please refer to the Agency Fee Configuration and Charges Setup and Use guide for further details.

New Look Property Vacancy Counter Report

New Property Vacancy Counter Report	The new Vacancy Counter Report offers a new layout and improved rendering of images. The new report will use the information saved in the Advert tab in Property Details. Other features include: • New Page Per Area Code • Sort by Price Descending • Icons to represent number of bedrooms, bathrooms and car spaces • Rent per month for properties with monthly rent configured
Old Vacancy Counter Report	The old report will still be available under Reports > Other > Vacancy Counter Report (Old Version) if you wish to view or use it while transitioning to the new report.

Other Changes

Drag and Drop Images	Re-ordering of property advertising images is now an easy drag-and-drop action. Simply click and hold an image, then drag it to a different position.
Duplicate Cheques	If duplicate cheque numbers exist in previous months, you will have an option to select from a list of the duplicated cheques when cancelling cheques from a previous period.
Area Code filter on Management Report	An Area Code filter has been added to the Management report to provide for use by users with multiple offices and areas.
Replicate Owner Details	The new Replicate – F8 button on Owner Details will create a new owner with the following details duplicated from the original owner: • Owner Name • Address • Salutation • Contact Details • Payment Details • Withhold Funds details • Statement control settings including additional address details • Owner file notes • Tax & Charges details A new Owner Alpha must be entered before saving the replicated owner.
Print Letters or Export Data	Mail merge fields are now available for bulk mail merges to Solicitors.
Letter sent description on Tenant Ledgers	The Tenant Ledger and Quick Tenant Ledger now display more of the Letter Sent description.
Inspection Manager	The following details will now be synchronised to Inspection Manager for users who are configured to use Inspection Manager with REST: • Tenant Short Name • Tenant Lease Name • Alarm Code for the property • Inspecting Agent • Inspection Time From and To Download the Inspection Manager Integration Setup and Use guide for more information on Inspection Manager Integration.

Manual Trust Receipts	Some receipt types did not use sequential numbers for manual receipts. This has been resolved and all trust receipt types will now use the next available manual receipt number.
Global Changes	An issue with the Property Rental Update list for properties with multiple tenants being duplicated when repeatedly selecting the Change button has been resolved.
Sales Advertising Grid	In some instances an error occurred when selecting No to delete an item from the Sales advertising grid. This has been resolved along with an RTE381 when deleting the 2nd item from the Sales Advertising grid.
Linked Disbursements	Linked Disbursements paid to Agent now correctly processes the disbursement from Internal Owner AATENINV.
fileSMART Creditor Disbursements	The invoiced flag is no longer reset in fileSMART Creditor Disbursements when the row is deselected.
FSCD Print List Report	The FSCD Print List report no longer displays Invoice created outside of FSCD screen while FSCD screen is open.

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