How to Export Data in REST Professional

Overview

REST Professional can now export selected fields to excel. The export data feature will allow you to:

- Export Tenants, Owners, Creditors, Properties, Holiday Bookings, Sales, Solicitors, Diary or Contact information to an ASCII tab delimited text file able to be used in other word-processing or spreadsheet applications
- Export Tenants, Owners, Creditors, Properties, Holiday Bookings, Sales, Solicitors, Diary or Contact information to an Excel spreadsheet
- Create templates with selected merge fields to customise the export of Tenant, Owner, Creditor, Property, Holiday Booking, Diary or Contact information to an Excel spreadsheet
- Select from a list of previously saved templates to export selected merge fields to an Excel spreadsheet

This Document will cover:

- Required User Security Levels
- How to Export to File or Excel
- How to Export to New Template
- How to Export to Existing Template

- How to Delete a Template

Required User Security Levels

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

Security Levels can be changes in Files > User > User Profile. The required security levels are as follows:

- Export to Excel – A minimum security level of Export Data & above is required
- Export to File - A minimum security level of Export Data & above is required
- Create New Templates – A security level of Manage Templates & above is required
- Export to Existing Template – A minimum security level of Export Data & above is required
- Delete a Template – A security level of Manage Templates & above is required How to Export to File or Excel

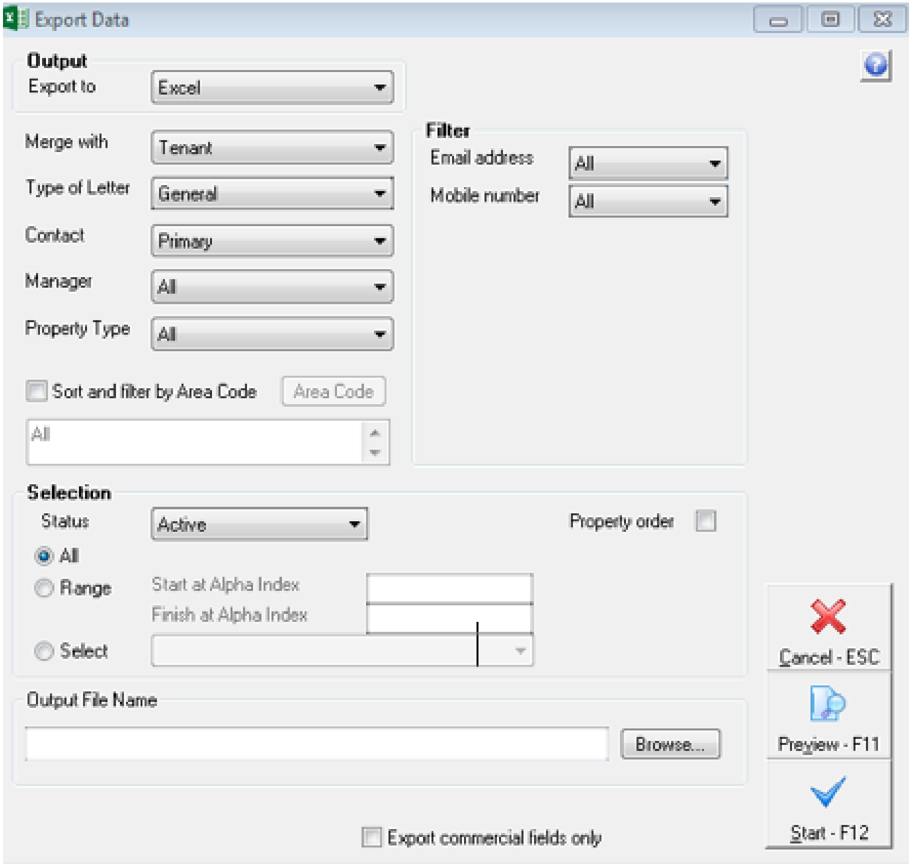
How to Export to File or Excel

1. Go to Other > Export Data
2. Export to – Choose either File or Excel as required
3. Merge with – Select Owner/Property or Tenant as required
4. Type of Letter – Leave this default to General
5. Contact – Leave this default to Primary
6. Selection – Choose from either All, Range or Select the required information

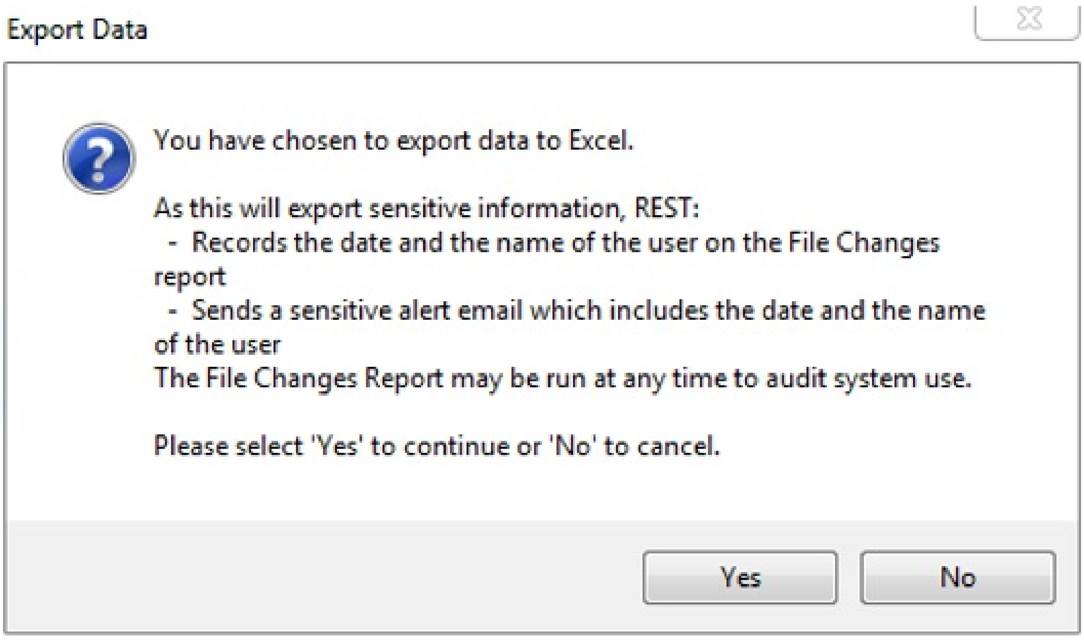
7. Output – Select Excel

8. Output File name – Enter a file name i.e. owner details

9. Click on Start-F12

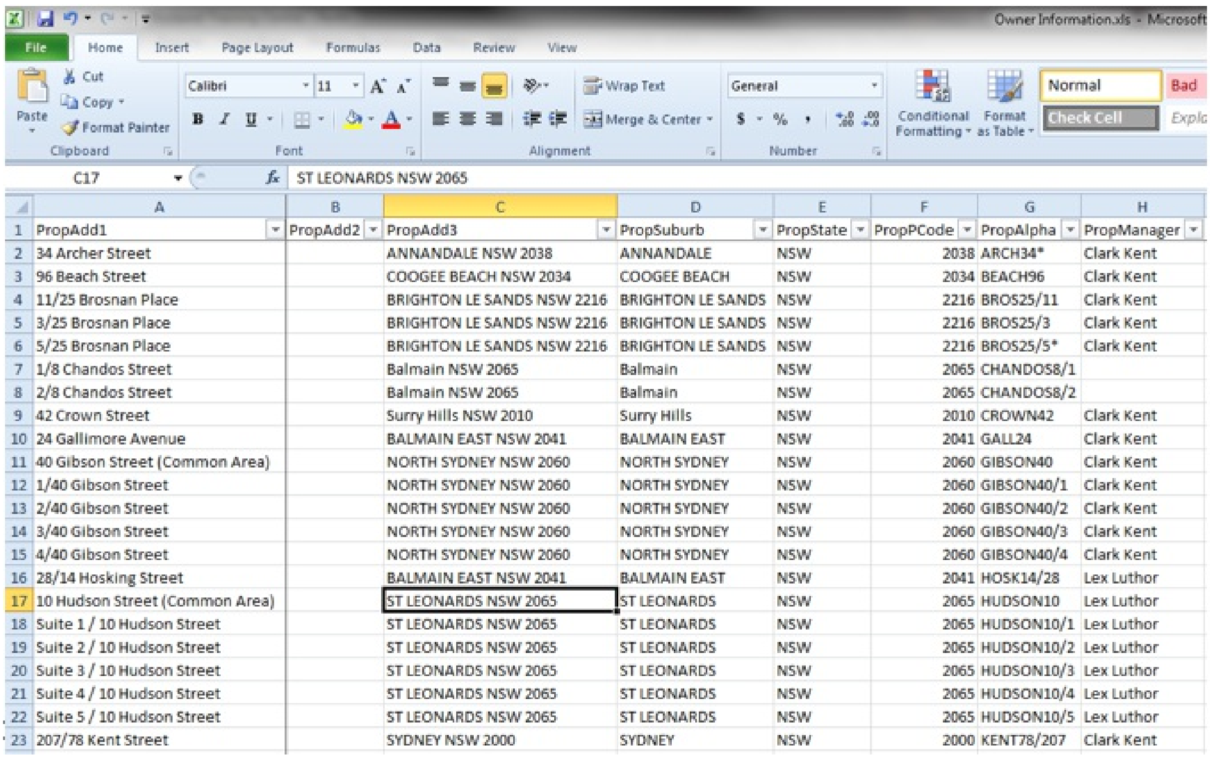


10. If setup to receive sensitive alerts, proceeding will generate the following message and will record on the file changes report and send a sensitive alert email.Select **YES** if you wish to proceed



11. The excel spreadsheet will generate at the bottom of your screen in your task bar

12. From here you can delete or edit columns and save as required



	PropAdd1	PropAdd2	PropAdd3	PropSuburb	PropState	PropPCode	PropAlpha	PropManager
2	34 Archer Street		ANNANDALE NSW 2038	ANNANDALE	NSW	2038	ARCH34*	Clark Kent
3	96 Beach Street		COOGEE BEACH NSW 2034	COOGEE BEACH	NSW	2034	BEACH96	Clark Kent
4	11/25 Brosnan Place		BRIGHTON LE SANDS NSW 2216	BRIGHTON LE SANDS	NSW	2216	BROS25/11	Clark Kent
5	3/25 Brosnan Place		BRIGHTON LE SANDS NSW 2216	BRIGHTON LE SANDS	NSW	2216	BROS25/3	Clark Kent
6	5/25 Brosnan Place		BRIGHTON LE SANDS NSW 2216	BRIGHTON LE SANDS	NSW	2216	BROS25/5*	Clark Kent
7	1/8 Chandos Street		Balmain NSW 2065	Balmain	NSW	2065	CHANDOS8/1	
8	2/8 Chandos Street		Balmain NSW 2065	Balmain	NSW	2065	CHANDOS8/2	
9	42 Crown Street		Surry Hills NSW 2010	Surry Hills	NSW	2010	CROWN42	Clark Kent
10	24 Gallimore Avenue		BALMAIN EAST NSW 2041	BALMAIN EAST	NSW	2041	GALL24	Clark Kent
11	40 Gibson Street (Common Area)		NORTH SYDNEY NSW 2060	NORTH SYDNEY	NSW	2060	GIBSON40	Clark Kent
12	1/40 Gibson Street		NORTH SYDNEY NSW 2060	NORTH SYDNEY	NSW	2060	GIBSON40/1	Clark Kent
13	2/40 Gibson Street		NORTH SYDNEY NSW 2060	NORTH SYDNEY	NSW	2060	GIBSON40/2	Clark Kent
14	3/40 Gibson Street		NORTH SYDNEY NSW 2060	NORTH SYDNEY	NSW	2060	GIBSON40/3	Clark Kent
15	4/40 Gibson Street		NORTH SYDNEY NSW 2060	NORTH SYDNEY	NSW	2060	GIBSON40/4	Clark Kent
16	28/14 Hosking Street		BALMAIN EAST NSW 2041	BALMAIN EAST	NSW	2041	HOSK14/28	Lex Luthor
17	10 Hudson Street (Common Area)		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10	Lex Luthor
18	Suite 1 / 10 Hudson Street		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10/1	Lex Luthor
19	Suite 2 / 10 Hudson Street		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10/2	Lex Luthor
20	Suite 3 / 10 Hudson Street		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10/3	Lex Luthor
21	Suite 4 / 10 Hudson Street		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10/4	Lex Luthor
22	Suite 5 / 10 Hudson Street		ST LEONARDS NSW 2065	ST LEONARDS	NSW	2065	HUDSON10/5	Lex Luthor
23	207/78 Kent Street		SYDNEY NSW 2000	SYDNEY	NSW	2000	KENT78/207	Clark Kent

How to 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.

1. Go to **Other > Export Data**
2. **Export to** – Export New Template
3. **Merge with** – Select the contact type
4. **Selection** – Set options to load the contacts to be included in export. Selecting the Property Order checkbox will sort the selected records in property order
5. **Template Name** – Enter a Template Name. Template names must be unique
6. **Template Description** – Enter a Template Description
7. Click on **Select Fields–F9**. A list of available fields displays for the selected contact type.
8. Select merge fields from the available merge fields as required and then click on the **Add** button
9. To remove fields from the Selected Merge Fields column, select the fields and use the **Remove** button
10. The Up and Down buttons can be used to move between fields in the **Selected Merge Fields** column
11. Click on **Save** to return to the Export Data screen and save the selected merge fields
12. Click on **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;
13. Click on **Start–F12** to generate the export file and save the template to the Existing Templates list

Selecting the following contacts types will 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 & 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

Selecting to merge with **Tenant** or **Contact** will load an additional option to select the **Type of Letter** which will activate additional filters to further define the selection of data

Selecting to merge **Contact** will load an additional option to select the **Contact** type

How to Export to Existing Template

A security level of **Export Data & above** is required to export existing templates. 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.

1. Go to **Other > Export Data**
2. **Export to** – Existing Template
3. The existing templates grid will now appear and will display System templates in alphabetical order, followed by User Defined templates grouped by merge type
4. Use the **Type** dropdown to filter the Selection in the grid to a specific group
5. Select a template to export. The Output File Name will populate automatically, and can be modified before proceeding.

6. You can click on the **View** button  for a list of the merge fields included in the selected template. Click on **Close** to return to the Export Data screen

7. Click on **Preview-F11** to check the what will Owner/Tenant/Properties included in the merge

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

8. If the Output File Name already exists in the specified location you will be prompted to overwrite the existing file or specify a different file name when Start is selected.

9. The file will open with the merged records in Microsoft Excel and a copy of the file will be saved in the specified location

How to Delete a Template

A security level of **Manage Templates & above** is required to delete existing User Defined templates. System templates cannot be deleted.

1. Go to **Other > Export Data**

2. **Export to -** Existing Template

3. Select the User Defined template you wish to delete

4. Click on the **Delete** button 

5. A confirmation message will display and the deleted template will be removed from the list of available templates

14/10/2019 3:18 pm AEDT