# Export Data in REST Professional Version 14

Overview

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

- Set the permissions for Print Letters, Mail Merge and Export Data for each user in REST Professional
- Create and save Excel templates with selected merge fields for each merge type (for example Owner, Tenant, Creditor)
- Select and export saved User Defined and System Templates

Changes to Screens and Menu Items

- A new security level has been added for all REST Professional users named **Print Letters / Mail Merge**
- The menu item **Other > Print Letters or Export Data** is renamed **Print Letters / Mail Merge**
- A new menu item named **Export Data** is located underneath **Print Letter / Mail Merge**
- The functionality to export data to File or Excel is now accessed from the new menu item **Export Data**
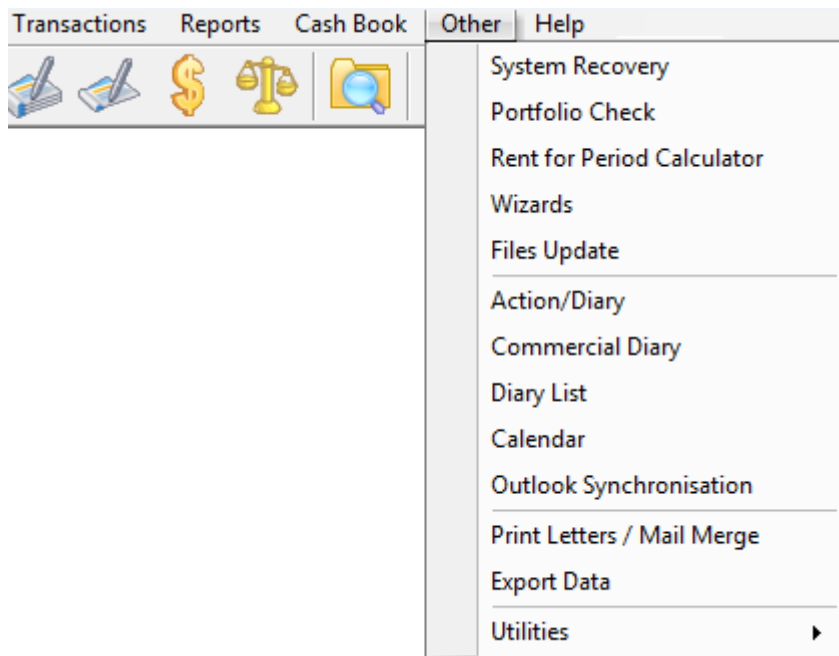

Prerequisites

- 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

User Details Setup

The upgrade to REST Professional Version 14 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 users with a system security level of **Statistics/Company Details/Passwords & above**.

This security level can be changed on the User Profile screen of User Details for each user. Changes to User security levels must be completed by a user with the REST Professional system security level **Statistics/Company Details/Passwords & above**.
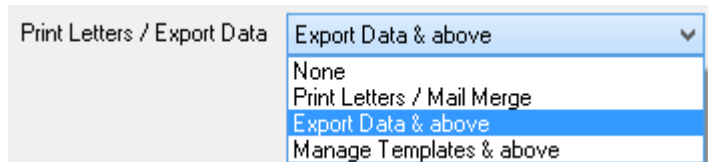
Print Letters / Export Data security levels

- **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*

Old vs New Functionality

Print Letter / Export Data (Old Functionality)		Print Letter / Mail Merge (Renamed Menu Item)	Export Data (New Menu Item)
Output Options included: ⬜ Mail Merge ⬜ Excel ⬜ File ⬜ Email ⬜ SMS ⬜ ADL Forms ⬜ REI Forms Live / Realworks		Output Options include: ⬜ Mail Merge ⬜ Email ⬜ SMS ⬜ ADL Forms ⬜ REI Forms Live / Realworks	Output Options include: ⬜ Excel ⬜ File ⬜ New Template ⬜ Existing Template
All available merge fields were exported when selecting Output options of File and Excel		User can define merge fields to be included when creating a New Template for export to Excel	
All REST users with System Security Level of Look and Print had access to export data	Users require a minimum Print Letters / Mail Merge Security Level to use bulk mail merge functionality		Users require a minimum Print Letters / Mail Merge Security Level of Export Data to export data to Excel and File Users require a security level of Manage Templates & above to create and delete user defined templates

Print Letters / Mail Merge

This menu item is accessed from the Other menu and users require a minimum security level of Print Letters / Mail Merge. Existing users will note that the Output options of File and Excel are no longer available from this screen the following merge functionality is retained:

- Merging letters to Microsoft Word
- Sending bulk Email messages
- Sending bulk SMS messages
- Merging to ADL Forms
- Merging to REI Forms Live

For more information on using the existing export functionality, select the Help icon directly from the Print Letters / Mail Merge screen.

Export Data

This menu item is accessed from the *Other* menu in REST and covers the following functionality:

- **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

Export to File or Excel

Existing REST Professional users will note that the layout of the screen differs slightly, but the functionality of exporting to File or Excel remains unchanged.

For more information on using the existing export functionality, select the Help icon directly from the Export Data screen.

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. Select Other > Export Data
2. Select the Output option Export to New Template
3. Select the contact type under Merge with
4. Set Selection options to load the contacts to be included in export. Selecting the Property Order checkbox will sort the selected records in property order.
5. Enter a Template Name. Template names must be unique.
6. Enter a Template Description
7. Select the Select Fields – F9 button. A list of available fields displays for the selected contact type.
8. Select one or more merge fields from the available merge fields and select the Add button to move the fields across
9. To remove fields from the Selected Merge Fields column, select the fields and use the Remove button
10. To reorder the fields in the Selected Merge Fields column, use the Up and Down buttons
11. Select Save to return to the Export Data screen and save the selected merge fields
12. 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

13. Select Start – F12 to generate the export file and save the template to the Existing Templates list.

Notes:

- 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 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
- 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

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 of REST will include 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. Select Other > Export Data
2. Select the Output option Export to Existing Template
3. The Selection grid 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. Select the View button for a list of the merge fields included in the selected template. Select Close to return to the Export Data screen.
7. Select Preview to review the records included in the merge. 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.

Delete a Template

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

1. Select Other > Export Data > Output Export to Existing Template
2. Select the User Defined template you wish to delete
3. Select the Delete button
4. A confirmation message will display and the deleted template will be removed from the list of available templates

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**

02/02/2016 10:55 am AEDT