rockend
The leader in property software

Understanding the Menu and Toolbar Options in REST Professional

Overview

The toolbar consists of a set of icons for the most commonly used functions and is shown with the window screen set to 1280 x 720 resolution.

All the icons have tool tips associated with them. Simply rest your mouse pointer on the icon and a message is displayed explaining the function of that icon.

This document will cover:

- Menu and Toolbar Options
- How to Switch between Sales and Property Management toolbars

Menu and Toolbar Options

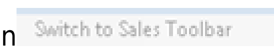
1. Navigate through the menu options:

   - **Files Menu** – Provides access to all of the master files, such as your owner, property and tenant files as well as access to chart of accounts, insurance policies, users, web advertising
   - **Transactions Menu** – All transactions and reversal options are located in this menu, such as rent receipts, creditor disbursements and invoice enrty, journals etc
   - **Reports Menu** – All reports for owner, tneants and creditors are accessed through this menu together with property maintenance and management reports etc. Owner and creditor payments are also made from this menu
   - **Cashbook Menu** – holds all receipts and payments reports as well as the bank reconciliation, banking, audit reporrts and jourals and transactions reports etc
   - **Holiday booking menu** – this displays if you have a Holiday Bookings module installed only
   - **Other Menu** – Provides access to miscellaneous options, including mail merge, diary list and settings for your rest program, together with system recovery and files update functions
   - **Help menu** – Gives you access to the news feed and our rockend website, where you can access our knowledgebase, book training and log a support call, also gives you information on your file path and version information

2. Navigate through the Toolbar Options:

- **Rent Receipts** – Enter receipts for rent, tenant invoice payments, bonds and tenant invoice credit. You can also charge selected owner and tenant fees
- **Creditor Disbursement** – Enter creditor disbursements ready to be paid, if setup in system options this will create an outstanding disbursements
- **One Off creditor payment** – Post & Print a creditor disbursement for immediate payment
- **Banking** - Print and clear the banking
- **Banking reconciliation** - Access the bank reconciliation screen
- **Smart Search** – Enter a name, partial name or alpha index to search files for that name
- **Owner** – Add, change or view an Owner
- **Property** – Add, change or view a Property
- **Tenant** – Add, change or view a Tenant
- **Security deposit** – Enter a Tenant Deposit Receipt
- **Sundry receipt** – Enter a Sundry Receipt from anyone other then the tenant
- **Quick disbursement** – Enter Quick Disbursements or manual cheque where no printing is required
- **Tenant Invoice** – Enter a Tenant Invoice
- **Property maintenance** – Add or view property maintenance jobs
- **Creditors** – Add, change or view a Creditor
- **Action Diary** – Create or maintain and action/conversation diary
- **Calendar** – Display all action items on the calendar
- **Wizards** – Access the Change of ownership/Inspection Update, Owner Payments & End of Month/Backup/Restore Wizards
- **Padlock** – Use this button to lock your screen while you are away from your desk or change user/password. Note: By locking your screen you are still actually logged in
- **Calculator** – Displays the Rent Calculator which can be used either whilst in a tenant file or simply by clicking the icon without anything else open
- **Printer** – When a masterfile is accessed, this icon can be used to print or preview the Ledger/Owner Statements
- **REST Document Management** – Access documents, images, email etc saved within the document management
- **fileSMART Document Management –** Provides direct access to fileSMART login screen to search within fileSMART
- **Help** – Access REST Professional help menu which is searchable and allows you to access all release notes for REST

How to Switch between Sales and Property Management Toolbars

Click on 

to switch between Sales and Property Management Toolbar. This can also be accessed by going to **Other > Toolbar View**

NOTE: Each user can have a default toolbar. Go to **Files > User > User Profile** and select Property Management or Sales from the Toolbar View drop down list. Only users with the highest security level **Statistics /Company Details/Passwords & Above** can set a user's default toolbar view.