rockend
The leader in property software

REST Professional Version 14.5.07 Release Notes

Diary List	Selecting the Assigned to option of Another User and Manager in V14.5.06 resulted in incorrect diary records being retrieved. This issue has been resolved.
Database Security Improvements	Additional changes have been implemented from v14.5.06 to the way in which REST Professional accesses its database.

REST Professional Version 14.5.06 Beta Release Notes

Version 14.5.06 - Beta Release

Additional Owner Contacts

Owner Reports	• When reprinting historical Owner Statements and Income & Expenditure Reports for deleted ownership's or owner contacts; reports will be printed and not emailed. **Helpful Tip**: To email reports to a deleted Ownership or Owner Contact; select the email button from the preview screen. • When reprinting Owner Statements and Income & Expenditure Reports, the owner's delivery method set in the current month will be used to determine how to deliver the reprinted reports. When email is selected for owner reports, the email address set in the current month will be used. • When emailing Owner Statements to an Additional Owner Contact set as the Primary Contact, the Primary Owner's email address was used. This issue has been resolved.
Search – F7 function	• When using the Search - F7 function in Owner Details, the option Search contacts will be selected by default. • An error that occurred in the Search - F7 function when no results were found when searching inactive owners has been resolved.
Ownership Contacts screen	When emailing all owners from the Ownership Contacts screen, the OK - F12 keyboard shortcut was not functional. This issue has been resolved.

Reporting

Tenant Reports	• Tenant Water Invoices generated with a GST charge will now display the GST figure on the invoice. • The Tenant Invoice/Statement report with tear-off remittances will now also display the tenant's direct debit details when applicable.

	• The Tenant Download report may now be exported or printed after processing. Previously, this report could only be printed.
Sales Reports	Sales Reports generated for individual sales will display an option to email the Vendor Solicitor on the Email screen.

Property Reports	• The layout of the Property Details report has been modified to improve readability:
	  ◦ A new menu item Property Information has been added to the Property Reports menu list.
	  ◦ The Insurance Due Report, Smoke Alarm Report and Water Efficiency Report will now be accessible from the Property Information menu, as well as the new Pool & Pool Fence Report.
	• The Property Authority Date Report caused an error if an invalid date was entered in the date filter. This issue has been resolved, and the user will be prompted to enter a valid date.
	• An error that occurred when selecting the Print button on the Property Budget tab for non-Commercial properties has been resolved.

Print Letters/Mail Merge and Export Data

Tenant Correspondence	• In some instances, when sending bulk non-general tenant correspondence no records were found to merge. This issue has been resolved. • When sending non-general tenant correspondence filtered by date, the date column in the Preview screen did not sort the dates in chronological order. This issue has been resolved.
Owner Correspondence	• When sending owner correspondence, the Preview screen layout has been modified to display owner information more clearly. • When merging with Owners; in some instances the lookup list displayed by Manager instead of by Owner. This issue has been resolved.
RockendSMS	• RockendSMS merge fields now display merge fields containing special characters correctly (e.g. ampersand and quotes) • When merging with tenants and sending bulk RockendSMS messages to owners, the screen wording and layout has been improved.
Export Data	• When exporting data to a File or Excel, email addresses containing blank spaces were not exported in the correct format. This issue has been resolved. • When Exporting Owner data, the Send Income and Expenditure by method was not being exported. This issue has been resolved.

Receipts

Changes to Rent Invoice Screen	The Rent Receipt Invoice screen now displays both Tenant Water Invoice Descriptions for Tenant

	Water Invoices with two water charges.
Change to System Options > Save Receipts	All receipt types will be saved by default after upgrading to REST Version 14.5.06. The System Option to save receipts has been removed.

Portfolio Check Enhancements

Portfolio Check	- The Portfolio Check now displays a new heading Property Information with sub-headings: - Pool Fencing - Smoke Alarms - Water Efficiency - In User Details, the Portfolio Check option previously labelled Smoke Alarms has been renamed Property Information.

REST Mobile v7.0

REST Mobile Enhancements	- REST Mobile Version 7.0 includes the ability to retrieve Additional Owner Contact details and display Tenant status information. - REST Mobile Version 7.0 includes improvements to Property and Sale search functionality, as well as general search performance and security improvements.

Other Changes

Performance improvements	- In some instances, large clients experienced performance issues when accessing the Diary or Portfolio Check. This issue has been resolved. - In some instances, databases were experiencing system issues when creating or cancelling ABA files. - Improvements were made to the processing time when allocating Tenant Invoice Credit on databases with a large number of tenant records.
Diary Improvements	The Diary List screen has been updated to display the extended Ownership Name in full.
REI Forms Live	REI Forms Live Inspection forms are now available when merging with: - REINSW - REISA - REIWA
Business Alerts	Bank Reconciliation Business Alerts sent to the Principal/Director now uses the date the bank reconciliation totals were last recalculated. Previously, the date of the last Files Update was used for these alerts.

Energy Efficiency Rating	The EER (Energy Efficiency Rating) field previously located on the General tab of Property Details has been relocated to the Property Information tab.
FileSMART Integration	Outstanding Disbursements created for linked Property Maintenance Jobs from fileSMART Creditor Disbursements now use the current REST date as the Due Date.
Inspection Planner and Inspection Follow up screens	When loading a Property from the Inspection Planner or Inspection Follow up screens, the Replicate button will no longer be active.
Company Details > Attached cheque layout	An error that occurred when editing the Attached cheque layout text file in Company Details has been resolved.
Holding Deposit	A prompt will now display when archiving a tenant to advise the user that an unallocated Holding Deposit exists for the tenant.
RPUpload	RPUpload has been updated to display all postcodes correctly for multiple suburbs with the same postcode.
Web Advertising Uploads	An error with Web Advertising Uploads when advertising images have been removed or renamed has been resolved.
Advanced Commercial	• In some instances when creating an Interest on Arrears invoice for Advanced Commercial tenants from existing invoices, the invoice preview screen did not refresh the invoice list correctly. This issue has been resolved. • In some instances, linked tenant invoices for Advanced Commercial tenants where the GST Start Date was not entered could affect charging of management fees. This has now been resolved.
Holiday Bookings	Holiday Booking Credit Card Details can now be saved for credit cards with an expiry date 20 years ahead of the REST Accounting month.
Internal Owners	An Owner Contact record will be created for Internal accounts created automatically in REST (e.g. AAINVCRED).
Database Security Improvements	To further support the integrity and security of our clients' data; Rockend has increased security around how the REST Professional application accesses its database.

REST Professional Version 14.5.05 Release Notes

Owner Statements	In some instances, an issue occurred in V140.5.04 when reprinting historical owner statements on databases where owner or owner contacts have been deleted. In some cases this resulted in incorrect contact names and email addresses being retrieved. This issue has been resolved.

REST Professional Version 14.5.04 Release Notes

Additional owner contacts

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This feature has been enhanced to allow Additional Owner Contacts to be included when using the Search – F7 functionality in Owner Details
The options for Owner Statements and Income & Expenditure Reports have been improved to allow separate delivery methods:

Send Statement by options will determine the delivery method of owner statements for the Primary Owner; the options are Post or Email. At upgrade all Primary Owners will default to their previously configured statement delivery method.
Send Income & Expenditure Report by will determine the delivery method of these reports for the Primary Owner; the options are Post or Email. At upgrade this option will default to be the same as the Send Statement by method for all Primary Owners.

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<td>Changes to Owner Details General tab</td>
<td>

The System Option Email Owner Statements will determine the delivery options for Owner Statements and Income & Expenditure Reports.

None – Owner Statements and Income & Expenditure Reports will be printed and the option to email the reports will not be available when configuring the Owner’s delivery methods or when generating the reports
PDF Format - Owner Statements and Income & Expenditure Reports will be delivered via email as a PDF attachment if the Owner’s delivery method is set to email and the option to Send via email is selected when the reports are generated
HTML Format - Owner Statements and Income & Expenditure Reports will be delivered via email as an HTM or HTML attachment if the Owner’s delivery method is set to email and the option to Send via email is selected when the reports are generated
Print emailed owner statements – when this option is selected, Owner Statements and Income & Expenditure Reports delivered via email will also be printed

An option is available to specify a Quantity for the number of copies of the Owner Statement to be printed for each Primary Owner
The requirement to add a Salutation for the Primary Owner on the General tab has been removed, and the Salutation field has been modified to allow 28 characters

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<tr>
<td>Changes to Additional Owner Contacts</td>
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The options for Owner Statements and Income & Expenditure Reports have been improved to allow separate delivery methods for Additional Owner Contacts:

Send Statement by methods of None, Post or Email will be available for owner statement delivery for Additional Owner Contacts. At upgrade all Additional Owner Contacts will default to their previously configured statement delivery method.

Send Income & Expenditure Report by methods of None, Post or Email will be available for I&E report delivery for Additional Owner Contacts. At upgrade this option will be set to None (blank) for all Additional Owner Contacts.
When a new Additional Owner Contact is created and saved, the created date/time stamp will display when reloading the screen

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An option has been added on the Additional Owner Contact screen to exclude the contact from bulk mail merge letters sent from Print Letters / Mail Merge.
An option has been added on the Additional Owner Contact screen to copy the Primary

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Changes to Additional Owner Contacts	Owner's address to any Additional Owner Contact linked to the ownership
	• Changes have been made to the defaulted state of the *Owner* flag for Additional Owner Contacts. The upgrade functionality will be as follows:
	  ◦ When upgrading from REST V14 or earlier, all Additional Addresses on the Payment tab of Owner Details will be converted to Additional Owner Contacts with the Owner flag deselected.
	  ◦ The upgrade from REST V14.5.02 (Beta) to Version 14.5.03 will not affect the Owner flag for existing Additional Owner Contacts.
	  ◦ New contacts added in V14.5.03 will be created with the Owner flag deselected.

Adding new Owners with Additional Owner Contacts	• When creating a new ownership (Owner Details is in ADD MODE) the option to add or view Additional Owner Contacts will only be available after the **Alpha index and Ownership** fields are populated • A prompt will display when in ADD MODE if the new ownership is not saved but Additional Owner Contacts have been created
Owner Withhold Funds Report	This report has been modified to print fewer characters of the Ownership name to allow the information in all columns to display clearly
Owner Detail List	• The report options have been changed to allow filtering by Account Type as well as Contact type • An additional Contact type of **Primary Owner** has been added • An issue with some current owner information displaying when generating the report for historical periods has been resolved
Owner Statements and Income & Expenditure Reports	• The option to send emailed Owner Statements and Income & Expenditure Reports when generating these reports will be based on the System Option **Email Owner Statements**. In V14.5.02, the option was available to be selected when generating reports when the System Option was set to None. • The Ownership Name will display below the Owner's address details on all Owner statements (excluding Statement Style 5) and Income & Expenditure Reports • For some statement styles, the Primary Owner's statement will display the text **Primary Owner Statement for Period Ending [dd/mm/yy]** • The System Option to print owner phone/fax numbers on Owner Statements no longer applies to Property Management owners and has been renamed **Print vendor contact numbers (Sales only).** When selected, contact numbers will be printed on Sales Statements only.
Changes to the Ownership Contacts grid	• When the option View all Contacts is selected from the Owner Details screen, the Ownership Contacts grid displays a list of all contacts linked to the ownership.

	• An option has been added to send a single email to all contacts linked to an ownership from the Ownership Contacts grid.

Changes to the Ownership Contacts grid	◦ When the option is selected, a Microsoft Outlook will load a single email and contacts flagged as Owners with unique and valid email addresses will be included as recipients ◦ The subject will be pre-populated with the Ownership Name ◦ A diary note will be saved against the Primary Owner if the option is selected. • A copy of the email will be saved to the Primary Owner's Document Management folder if the option is selected

fileSMART tenant invoices

Bulk options for fileSMART Tenant Invoices	An option has been added to the fileSMART Tenant Invoices screen to select bulk print/email and global comment options for all invoices selected for processing. Selecting the bulk option will override existing print, email and global comment options on individual invoices
Printed/Emailed Water Invoices	When water invoices with the option **Disable Debit** selected are printed and emailed from the fileSMART Tenant Invoices screen, the following text will display on the invoice: **At the time this invoice was printed, direct debit is temporarily disabled for this item**
GST Exempt flag (NZ Only)	When the database region is set to NZ, the Water Invoicing screen will load with the GST Exempt flag selected or deselected for Residential Tenants based on the System Option **Invoices exempt from GST**
Multi-user functionality	The prompt that displays when multiple users process tenant water invoices from fileSMART Tenant Invoices simultaneously has been changed to display the correct number of invoices processed by the other user
Tenant Invoice Commission	When the **Tenant Invoice Comm %** is not set in Property Details > Financial tab, the tenant water invoice loaded from the fileSMART Tenant Invoices screen will display a blank **Manage fee** field. Selecting the + symbol on the keyboard will load **the Base Commission %** saved in Property Details > Financial tab
Tenant Details	When a row is selected in the fileSMART Tenant Invoices grid, the tenant's Original Lease Date will display in the Tenant Details frame above the grid. In V14.5.02, the tenant's Lease Start Date displayed.

Tenant water invoicing in REST

Bulk Water Invoicing Update	A utility has been added in Global Changes to allow the Charge Tenant Water flag to be updated in bulk for active properties and linked active tenants
Tenant Details Invoices tab	• The Invoices outstanding frame now includes the total balance of Future invoices • The layout of the Invoices tab has been improved to display information clearly • When a water invoice is created from the Invoices tab while the Tenant Details screen remains loaded, the tenant's water usage details will be updated on the Invoices tab when the water invoice is saved
	When the database region is set to NZ, the Water Invoicing screen will load with the GST Exempt

GST Exempt flag (NZ Only)	flag selected or deselected for Residential Tenants based on the System Option **Invoices exempt from GST**

Reports	The following reports have been modified to print fewer characters of the water invoicing descriptions to allow the information in all columns to display clearly: • Tenant Statement/Invoice • Effective Arrears Report
Water Invoicing prompts	The following areas in REST have been modified: • When configuring a Creditor to prompt for Tenant Invoicing, the option **Water Using Invoicing Screen** has been changed to **Water Invoicing Screen** • The prompt that displays when creating a disbursement for a Creditor configured to prompt for water invoicing has been changed from **Do you want to invoice the Tenant for water** usage has been changed **to Do you want to invoice the Tenant for water charges?**
Property Details Information tab	The following prompt will display when the **Charge Tenant Water** option is selected in the Water usage frame: **You have changed the water usage details. You may want to update the tenant(s) as well.** Selecting OK will close and save the Property Details screen.
Water Invoices Balance Owing	When a Tenant Water Invoice is reloaded, the Balance Owing label will display the outstanding invoice amount.
System Options Email all invoices as default	The option to email the invoice from the Water Invoicing screen was not available in V14.5.02 if the Accounts contact had an email address but the Primary contact did not and the System Option to email all invoices as default was enabled. This issue has been resolved.
Tenant Statement/Invoice Printing	The layout of the Tenant Tax Invoice generated when selecting **Reports > Tenant > Statement/Invoice Printing** has been modified to display more details of Tenant Water Invoices.
Tenant Details	When the tenant has been specified in the Water Invoicing screen, the tenant's **Original Lease Date** will display in the Tenant Details frame. In V14.5.02, the tenant's Lease Start Date displayed.

Other enhancements

Tenant Details Invoices tab	The Invoices outstanding frame now includes balances of Future invoices
Portfolio Check	Changes have been implemented to improve the load time of the Portfolio Check screen when retrieving large numbers of diary records.
	The **Diary – Actions required** screen will display as a pop-up if outstanding action required diary items exist for the tenant when a tenant invoice is created or reloaded. • When a tenant invoice is created or viewed, the pop-up will display when the tenant has been

Tenant invoicing	specified • When a tenant water invoice is created, the pop-up will display when the property has been loaded and the tenant has been specified. • When tenant invoices are reviewed in the fileSMART Tenant Invoices screen, the pop-up will not display
System Options Reset transaction index	An option has been added in System Options to improve the process of creating and cancelling ABA files for databases with large transaction numbers. A response code will be required to set this option
NAB Banking Products	The following 2 products from National Australia Bank are now available to be selected in the Bank Download Configuration screen in Company Details: • National Australia Bank Allocated EFT (NABA) • National Australia Bank Connect (NABC)

Other changes

Interest on Arrears Invoicing (Advanced Commercial Module)	An error that occurred when creating an Interest on Arrears invoice from an existing invoice has been resolved
Duplicate Disbursement Warning	When the System Option **Warn if duplicate PM disbursement is found** is enabled, the warning icons in the following screens have been updated to display the correct icon when potential duplicate disbursements are detected: • Barcode Creditor Disbursements screen • fileSMART Creditor Disbursements screen
fileSMART Creditor Disbursements	The icons to indicate when invoices have been created in REST or fileSMART Tenant Invoices have been updated
Inspection Manager	Inspection reports for closed inspections saved to Document Management will be created with a unique filename to allow multiple inspections with the same inspection ID to be reprocessed and saved to document management. The date and time will be appended to the filename to produce the following format: **[filename]_yyyymmddhhmmss**
Change of Ownership Wizard	When the option **Copy diary** was selected during the processing of a Change of Ownership, Commercial diary items were not included. This issue has been resolved
Clearing Statements	In some instances the Brought Forward balance when previewing clearing statements was not reset correctly when the reporting period was changed. This issue has been resolved
Exporting REST Reports	An error occurred for some users when exporting reports from REST Professional when the user did not have access to the selected directory. This issue has been resolved
Round to 10c	When the database region is set to NZ, the System Option for rounding will be changed from **Round to 5c** to **Round to 10c.**

Property Details Information tab	When the System Option to Use Water Invoicing was disabled in V14.5.02, the Property Water Efficiency status and Water Efficient Last Inspection Date fields were disabled and could not be edited. This issue has been resolved.
Trust Trial Balance report	The Total Trust and Trust subtotals have been adjusted to align correctly.
Sales Statements	In REST Version 14, the option to print comments when generating Sales Statements was not available. This issue has been resolved.
Charge Agency Fees	In some instances, amounts entered with more than 2 decimal places in the Charge Agency Fees screen were rounded correctly but processed incorrectly, resulting in an imbalanced bank reconciliation. This issue has been resolved
Inspection Follow Up	An issue with GST not calculating for Inspection Fees charged on Incoming and Outgoing inspections has been resolved
Realestate.co.nz	The suburbs list for Realestate.co.nz has been updated
System Recovery Failure	A System Recovery Failure occurred when running System Recovery after Sales receipts were processed with Bank Charges with a GST component. This issue has been resolved
Recurring Tenant Invoices	A change has been implemented to apply the value set in System Options for **Notice days for invoices** to Recurring Tenant Invoices. Previously, the due date for Recurring Tenant Invoices was set to the created date.
Outstanding Disbursements by Creditor Report	When generating this report on a database licensed for Rentals Only, an error occurred when selecting a history month. This issue has been resolved
Web Advertising Uploads	An error that occurred when uploading properties to the following advertising portals in REST V14.5.02 has been resolved: • TradeMe.co.nz • Realestate.co.nz • MyHome.com.au

Version 14.5.03 – Rockend Internal Release

REST Professional Version 14.5.02 Beta Release Notes

Version 14.5.02 – Beta Release

Additional owner contacts (New feature)

	• The Owner Name field in Owner Details directly underneath the Alpha on the General tab has been relabelled **Ownership Name** and the maximum character count has been increased from 40 to 100 characters.

<table>
<tr><td>Changes to Owner Details > General tab</td><td>
The Ownership Name field has been extended to display more of the details entered. A tooltip will display up to 100 characters.
The Contact section has been renamed Contact Details and the layout has been improved to include the Primary Owner's Address details.
A new section named Primary Owner is available to allow the following information to be entered:

Title
First Name
Last Name
Name (will now be automatically completed when First Name and Last Name are populated for the first time)
Salutation – will display the Salutation displayed in the Contact section prior to the upgrade

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<tr><td>Changes to Owner Details > General tab</td><td>
A new section named Communication is available on the General tab of Owner Details to allow the following information to be entered:

Preferred Communication Method (Post or Email)
Send Statement Method
Income & Expenditure Report
Contact types of Primary, Lease, Accounts and Repairs
Comments

The Send Statement by Email label and checkbox will be removed from the Payment tab.

If this option was checked for the Primary Owner at upgrade, the Send Statement option in the new Communication section of the General tab of Owner Details will default to Email
If this option was unchecked for the Primary Owner at upgrade, the Send Statement option in the new Communication section of the General tab of Owner Details will default to Post

A new option Income & Expenditure Report will display and be selected by default for each Primary Owner when upgrading to REST V14.5. This option will be also selected by default when a new owner is added in REST.
Split Payment details will continue to display on the General tab
</td></tr>
<tr><td>Owner Reports</td><td>
As many characters of the Ownership Name as possible will display on owner reports.
The Owner Detail Report can be filtered to display details of all Owner Contact types.
</td></tr>
<tr><td>Changes to Owner Details > Payment tab</td><td>
Additional Address Details saved on the Payment tab at upgrade will be automatically converted to Additional Contacts
The Name, Address, Email address and Send Statement by Email setting for each existing Additional Address will be retained during the upgrade, and will display in the new Additional Owner Contact screen for each record
The Additional Address Details label and button will be removed from the Payment tab
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<table>
<tr><td></td><td>The No. of Copies label and drop-down will be removed from the Payment tab
Group and Layout style will continue to display in the Statement control section of the Payment tab</td></tr>
<tr><td>New screens in REST</td><td>After upgrading to REST V14.5 the following new buttons will display on the General tab of Owner Details:
Add new Contact – selecting this button will load the new Additional Owner Contact screen
View all Contacts – selecting this button will display all contacts linked to the ownership in a grid layout.</td></tr>
<tr><td>Additional Owner Contact screen – Correspondence Details</td><td>The new Additional Owner Contact screen allows the following information to be entered in the Correspondence Details section for each contact linked to an ownership:
Owner status – during the upgrade all existing Additional Address Details will be automatically flagged as owners. When a new Additional Owner Contact is added, the Owner flag is optional.
Relationship (to Primary Owner e.g. Spouse, Accountant)
Title (Mr, Mrs, Ms Miss, Dr, Prof, Hon)
First Name
Last Name
Name
During the upgrade the Name previously entered in the Additional Address Name field will be copied to the Name field
When adding a new Additional Owner Contact the Name field will be automatically completed when First Name and Last Name are populated for the first time
Salutation – during the upgrade the Name previously entered in the Additional Address Name field will be copied to the Salutation field for each contact. An option is available here to create a Microsoft Word document for each Additional Owner Contact.</td></tr>
<tr><td>Additional Owner Contact screen – Contact Details</td><td>The new Additional Owner Contact screen allows the following information to be entered in the Contact Details section for each contact linked to the ownership:
Home phone number
Work phone number
Fax number
Mobile number - an option is available to create a SMS message for each Additional Owner Contact
Email address - an option is available to create a single email for each Additional Owner Contact
Address Line 1,2, and 3</td></tr>
<tr><td></td><td>The new Additional Owner Contact screen allows the following information to be entered in the Communication section for each contact linked to the ownership:</td></tr>
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<table>
<tr><td>Additional Owner Contact screen – Communication</td><td>Preferred Communication Method
Send Statement Method (Post, Email or None)
Income & Expenditure Report
Contact types of Primary, Lease, Accounts and Repairs.
Only one Primary Contact can be assigned per ownership
Multiple Lease, Accounts and Repairs contacts may be assigned to an ownership
A contact may be assigned multiple contact types
Comments</td></tr>
<tr><td>Ownership Contacts grid</td><td>The Primary Owner will be the first contact in the Ownership Contacts grid by default
Additional contacts flagged as an Owner will display immediately underneath the Primary Owner
The grid displays the following information about each contact linked to the ownership:
Owner status
Salutation
Contact Type
Preferred Communication Method
Relationship
An option is available to add an Additional Owner Contact from the Ownership Contacts grid.
An option is available to preview, print or export a list of all the contacts linked to an ownership.</td></tr>
<tr><td>Saving and Deleting Additional Owner Contacts</td><td>Additional Owner Contacts cannot be archived. When an Additional Owner Contact is deleted their data cannot be retrieved at a later stage.</td></tr>
<tr><td>Changes to Smart Search</td><td>Additional Owner Contacts will be searched when entering a search string in Smart Search.</td></tr>
<tr><td>Owner Contact Merge Fields</td><td>The new Owner fields introduced as part of the Additional Owner Contacts feature are now available when creating bulk Word mail merge templates or exporting data for Owners. The Owners Merging Variables List in the REST Professional Help file V14.5 has been updated to display the new merge fields.</td></tr>
<tr><td>Print Letters / Mail Merge</td><td>When selecting to Merge with Owners, an option is now available to select the Owner Contact Type to include in the bulk merge.
The default will be set to Owners Only which includes the Primary Owner as well as Additional Owner Contacts flagged as Owner
Other Owner Contact Type options include Primary, Accounts, Lease, Repairs and All
When selecting to Merge with Tenant and the Output Option is RockendSMS, an option will be available to Send SMS Message to Owner and then select an Owner Contact Type.</td></tr>
<tr><td>Export Data</td><td>When selecting to Export to Excel, File or New Template and Merge with Owners, an option is now available to select the Owner Contact Type.
The default will be set to Owners Only which includes the Primary Owner as well as</td></tr>
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	Additional Owner Contacts flagged as *Owner* • Other Owner Contact Type options include Primary, Accounts, Lease, Repairs and All
Setup and Use	Please refer to the **Additional Owner Contacts Setup and Use guide** included in your Beta Information Pack for more information on this feature.

fileSMART tenant invoices (New feature)

fileSMART Enhanced Integration with REST	REST Professional version 14.5 and fileSMART Version 7.0.2 introduces an enhancement to existing functionality that will allow bulk processing of tenant water invoices using fileSMART barcoded invoice processing with REST. Please refer to **Tenant Invoices with REST Professional Version 14.5 and fileSMART Version 7.0.2 Enhanced Integration** included in your Beta Information Pack for more information on using the enhanced integration.
Menu Changes	• The menu option **Transactions > fileSMART Creditor Disbursements** has been renamed **Transactions > fileSMART Integration**. • A new menu item **fileSMART Creditor Invoices** is available under the menu item **Transactions > fileSMART Integration** to access the new bulk tenant water invoicing screen.
Changes to Company Details	• The **Water Usage** tab in Company Details has been renamed **Water Invoicing** • The layout of the **Water Invoicing** tab has been improved to allow more default settings for water invoicing. Changes include: • The ability to save a description and date range for tenant water usage that will automatically populate when tenant water invoices are created • The ability to save a second water charge with a description and a date range. If configured, the details will automatically populate when tenant water invoices are created. The option to add a second water charge can also be managed at invoice level. • Improved layout of the Water Rate Defaults
Changes to fileSMART Archive Invoicing Workflow	• A new option of **REST Owner & Tenant Water Invoicing** will be available when creating Workflow for databases configured to use Water Invoicing in REST. • When approving an item created with the workflow type of **REST Owner & Tenant Water Invoicing**, a new data tab named *Tenant* will be available to record water usage details for the tenant. • Invoices approved with the workflow type of **REST Owner & Tenant Water Invoicing** will display in **fileSMART Creditor Disbursements** for the bulk creation of outstanding creditor disbursements and also in **fileSMART Tenant Invoices** for the bulk creation of tenant water invoices.
	• The Water Usage section on the **Information** tab in Property Details now includes an option to record whether a property's tenants are liable for water charges. The **Charge Tenant**

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<tr><td>Changes to Property Details</td><td>
Water flag will display:
On the Property Water Efficiency Report
In the fileSMART Creditor Disbursements screen.
The Charge Tenant Water setting saved on the property will automatically be applied to new tenants added to the property. The setting can be managed at Property or Tenant level.
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<tr><td>Changes to Tenant Details</td><td>
Tenant Details now includes an option to record whether the tenant is liable for water charges. The Charge Tenant Water flag saved in Tenant Details will display:
When creating new tenant invoices in REST
On the fileSMART Tenant Invoices screen
On the Tenant data tab when approving tenant water invoices in REST Owner & Tenant Water Invoicing Workflow in fileSMART Archive.
The Charge Tenant Water setting can be managed at Tenant or Property Tenant level.
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<tr><td>Changes to fileSMART Creditor Disbursements</td><td>
fileSMART Creditor Disbursements has been relocated to fall under the new menu item Transactions > fileSMART Integration.
In addition to existing functionality, when creditor disbursements are processed in REST via fileSMART Creditor Disbursements, REST will display a prompt to load the fileSMART Tenant Invoices screen if pending tenant water invoices are detected.
Water invoices with linked tenant water invoices will display new icons indicating the status of each invoice available for processing in fileSMART Creditor Disbursements.
The Charge Tenant Water status saved in Property Details > Information will display in the Property Details section for each invoice ready for processing outstanding disbursements in the fileSMART Creditor Disbursements screen.
Please refer to Creditor Disbursements with REST Professional V14.5 and fileSMART Enhanced Integration included in your Beta Information Pack for more information on the enhanced integration.
</td></tr>
<tr><td>fileSMART Tenant Invoices (New screen)</td><td>
Water invoices approved in fileSMART using REST Owner & Tenant Water Invoicing Workflow will be available to review and process in bulk in REST Professional from Transactions > fileSMART Integration > fileSMART Tenant Invoices.

A quick-launch button labelled Load FSTI has been added to the fileSMART Creditor Disbursements screen to provide easy access to fileSMART Tenant Invoices.

Please refer to fileSMART Tenant Invoices Setup and Use included in your Beta Information Pack for more information on using this feature.
</td></tr>
</table>

Property information enhancements

Changes to Property Merge fields	The fields displayed on the Property Information tab are available when creating bulk Word mail merge templates or exporting data. The Properties Merging Variables List in the REST Professional Help file V14.5 has been updated with these fields.

Changes to Property Details	• After upgrading to REST 14.5 the Reminders tab in Property Details will display details of Property Reminders only

Changes to Property Details	• The **Other** tab in Property Details has been renamed **Information** and will display the following property information:
	  ◦ Water Usage details previously displayed on the Reminders tab
	  ◦ Sub-metering details previously displayed on the Reminders tab
	  ◦ Smoke Alarm Quantity (new field)
	  ◦ Smoke Alarm type and Last Inspection Date previously displayed on the Reminders tab
	  ◦ Water Efficient details and Last Inspection Date previously displayed on the Reminders tab
	  ◦ Pool details copied from the Advert > Features tab
	  ◦ Pool Fence (new field)
	  ◦ Pets Allowed checkbox will update the Advert > Features tab
	• Comments (new field)

Enhanced tenant water invoicing in REST

Menu changes	To assist in streamlining the process of creating tenant water invoices in REST Professional the following enhancements have been made: • The option **Use Water Usage Invoicing** on the **Other** tab of System Options has been renamed **Use Water Invoicing** • The menu option known as Water Usage Invoicing accessed from the Transactions menu in REST has been renamed **Water Invoicing**
Changes to Tenant Details	• The section previously known as Residential Water Usage in **Tenant Details > Invoices** has been renamed **Water Usage**. • The new **Charge Tenant Water** flag saved against the tenant's property will automatically be assigned when creating a new tenant.
Enhanced Tenant Water Invoicing	The layout of the existing tenant water invoicing screen has been improved and includes the following new features: • The ability to raise a second water charge per invoice • An option to automatically populate the date range for all water invoices based on new settings in **Company Details > Water Invoicing** • An option to view the Rates Calculation for the invoice being created

screen	• Residential tenant water invoices reloaded from Tenant Details > Invoices will display the enhanced invoicing screen. Commercial tenant water invoices reloaded from Tenant Details > Invoices will continue to display in the old tenant invoice format during the Beta phase. The reloading of Commercial water invoices in the enhanced invoicing screen is currently under development. • The methods for calculating the **Invoice Total and Allowance (Units)** based on the tenant's allowance and Default Water Rates remain unchanged. All other functionality pertaining to options on this screen remain unchanged, although the placement of some options have changed.

Enhanced Tenant Water Invoicing screen	• The new **Water Invoicing** screen will load from all processes in REST that previously loaded the old Water Usage Invoicing screen:
	  ◦ Transactions > Water Invoicing
	  ◦ Transactions > Barcode Creditor Disbursements for Creditors with Prompt for Water Invoicing screen enabled
	  ◦ Transactions > Creditor Disbursements for Creditors with Prompt for Water Invoicing screen enabled
	  ◦ fileSMART Creditor Disbursements for Creditors with Prompt for Water Invoicing screen enabled
	  ◦ fileSMART Tenant Invoices for water invoices processed via **REST Owner & Tenant Water Invoicing** Workflow
	
	Please refer **to Enhanced Tenant Water Invoicing with REST Professional V14.5 Setup and Use** included in your Beta Information Pack for more information these enhancements.

Critical business alerts (New feature)

Changes to User Details	• A new option to nominate a REST user as Principal/Director is available in User Details. When checked, this option enables the **Business Alerts** tab. • A system security level of Statistics/ Company details/Passwords & above is required to nominate a Principal/Director. The Business Alert settings of a Principal/Director may only be edited by a fellow Principal/Director. • A Principal/Director can be configured to receive a Business Alert via email when a Bank Reconciliation and System Backup has not been performed for a set number of days. • The alert will be triggered when the first user logs into REST for the day and if an SMTP Server is successfully configured. • This feature is available for Property Management and Sales Databases.

	Please refer to **REST Professional Help in V14.5 for more details on configuring Business Alerts**

Portfolio check enhancements

Portfolio Check	• The Portfolio Check can now be launched by selecting the new icon located in the REST Toolbar • A new tab **Portfolio Access** is available in User details. A system security level of Statistics/ Company details/Passwords & above is required to configure this tab. • This feature allows REST users to view the Portfolio of other users when running Portfolio Check by selecting configured users from a drop down list. Please refer to **Please refer to REST Professional Help in V14.5** for more information these enhancements.

SMTP server authentication

SMTP Server authentication	• REST Professional version 14.5 introduces SMTP server authentication to allow bulk emails to be sent through internet email clients like Gmail. • Additional SMTP server details can be configured in System Options. This feature supports 2-step authentication and a log file with authentication activities and errors will be stored in the REST log file utility. • Previously configured POP3 Username and Password details will be retained during the upgrade to version v14.5, however the POP3 Server name will not be retained. Please refer to **REST Professional Help in V14.5 for more details on configuring your SMTP server**

Other enhancements

Smoke Alarm Inspection Report	The Smoke Alarm Inspection report now displays the quantity of smoke alarms as entered in Property Details > Information
Change of Ownership Reports	The reports generated during a Change of Ownership will now display details of Tenant Invoice Credit balances transferred
Vacating Tenant List	The Vacating Tenant List report layout has been enhanced to display Overpaid Arrears and Credit on up to 9 rental columns. Previously, this status was only available for Rent column 1.
System Recovery Failure Enhancements	To assist our Support team in identifying the reason for a System Recovery Failure, enhanced logging has been added to record details of System Recovery Failures in REST Professional. A System Integrity log file will be automatically saved in the C:\Temp\WebAccess directory for the relevant day of the week
	• The following changes related to Tenant Bond Details have been implemented:

Tenant Bond Details	When a bond amount for an existing tenant is changed, a prompt will now display to update the Bond amount on the Property. A reason for change will be required and an entry will be written to the tenant ledger

Other changes

Commercial Tenant Statements	An error will no longer occur when generating Commercial Tenant Statements for a tenant with an original lease start date prior to 1980.
Tenant Refund	When processing a tenant refund for a tenant vacating with multiple columns in arrears, the arrears for all columns were cleared, setting the tenant's true arrears to $0.00 This issue has been resolved.
Linked Disbursements	When creating Linked Disbursements while another user is processing Outstanding Disbursements, an issue occurred in some instances where the linked disbursements were not created correctly. This issue has been resolved
REIWA Web Advertising	The inspection start and end times are now updated correctly on the REIWA XML file uploaded to advertising portals
Property Details Financial tab	The Bond amount is now available as a field to upload to web advertising portals (Sage Case 746611)

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