



How to Setup and use ADL Forms in REST Professional

Overview

ADL Forms is a Third Party Product partnered with Rockend to enable you to mail merge from REST Professional into the ADL Forms programme. It is easy to set up, however you must have the programme installed on all machines you wish to use it on.

This document will cover:

- How to Setup ADL Forms
- How to use ADL Forms

How to Setup ADL Forms

1. Go to **Other > Utilities > System Options**
2. Click on the **Other tab** and tick **Use ADL Forms**
3. Click **OK-F12**

How to use ADL Forms

1. Go to **Other > Print Letters/Mail Merge**
2. Select all the criteria you require for the merge
3. Select if required from the **Selection** menu
4. In the **Output** select **ADL Forms**
5. Tick Document Management and/or Update Tenant History if required
6. Click Preview if you wish to preview the selected recipients before proceeding, then click Next
7. OR Click Start to begin the merge

8. ADL Forms will now open for you to select the specific forms you require to merge with

Print Letters / Mail Merge

Merge with: **Tenant**
 Type of Letter: **General**
 Contact: **Primary**
 Manager: **All**
 Property Type: **All**

Sort and filter by Area Code **Area Code**
 All

Filter
 Email address: **All**
 Mobile number: **All**
 Inspection Type: **None**

Selection
 Status: **Active** Property order:
 All
 Range Start at Alpha Index: Finish at Alpha Index:
 Select

Output
 Mail Merge
 Email
 SMS
 ADL Forms
 Realworks

Document Management
 Update tenant history

Cancel - ESC
 Preview - F11
 Start - F12

ADLForms Third Party Merge Options

Forms Package:
 Real Estate WA - Property Sales
 Real Estate WA - Property Management
 ADL Pocket PC Inspection Software WA

Forms:

Form Title	Form Name	Version
Bond Form - Lodgement of Security Bond Money	AU-WA-RE-PM-015	01.5
Bond Form - Variation of Security Bond	AU-WA-RE-PM-016	01.5
Exclusive Leasing & Managing Appointment of Agent - Residential	AU-WA-RE-PM-028	02.2
Exclusive Leasing & Managing Appointment of Agent - Residential (with Property Details)	AU-WA-RE-PM-031	02.2
Exclusive Letting & Managing Appointment of Agent - Holiday/Short Term Letting	AU-WA-RE-PM-029	02.2
Form 1AA - Residential Tenancy Agreement	AU-WA-RE-PM-040	01.2

Select a Template to Use
 ** Do not use a template **

Where Value Set in Template, Do Not Use Third Party Value

Action
 Print to Printer (File Save Settings will apply)
 Output to PDF
 View (Edit, Print, Save &/or Output to PDF)

Auto Save
 Yes No (Auto Save Settings will apply)

Default 'Auto-Save' Settings
 Save in Folder: C:\ADLForms\Files\
 Filename Format: Tenant Code, Date, Form Name
 NB: Default settings only apply where merging software does NOT specify a filename and path

Save above settings as default

OK Cancel

10/08/2016 2:26 pm AEST