



## Configuring your Rest Professional System Options and Settings in Preparation for Property Tree

In preparation for your move to Property Tree there are certain system options that will need to be adjusted in order to ensure a smooth migration of data and effective use of Property Tree functionality and features. You will also be provided direction at your trial migration in regards to best practice and data clean up.

### Transactional System Options

- **Check Digits**

- **Other > Utilities > System Options > Transactions > Display tenant check digit - modulus**
- If you are currently using the Tenant Check digit when processing tenant download leave this system option as ticked.
- If you are NOT using the Check Digit or it is not required by your bank you should have this option deselected. If you fail to remove the tick icon you will need to manually update your tenancy IDs within Property Tree.
- If you are unsure if you require Check Digit, please contact your financial institution and update your Rest Professional system options accordingly.

- **ABA and Direct Debit Payment Files**

- **Other > Utilities > System Options > System > ABA file drop down box**
- **If** you use ABA Files for EFT Payments and **if** this option is configured for **Non - Self Balancing** files this needs to be checked with your bank
- Property Tree uses Self Balancing ABA files, therefore **if** your bank only accepts **one format at any one time** you must **proactively** contact your banking manager. *Note:* This is commonly seen as a strict limitation with Westpac Bank, but you are strongly encouraged to check this regardless of who you bank with
- You must have them arrange for your online banking to accept **Self balancing** bank files starting from the day of your migration to Property Tree
- This will avoid any rejected files on the day of your migration which could result in significant delays in getting critical payees paid
- **If** this option is set to **Self Balancing-Auto** you do not need to action anything
- **Other > Utilities > System Options > System > Tenant debits ABA file self-balancing tick box**

- **If** you use ABA Files for tenant Direct Debits and **if** this option is **un-ticked** your files are currently uploaded to your bank as **Non - Self Balancing** and this needs to be checked with your bank
- Property Tree uses Self Balancing Direct Debit payment files, therefore **if** your bank only accepts **one format at any one time** you must **proactively** contact your banking manager.  
*Note:* This is commonly seen as a strict limitation with Westpac Bank, but you are strongly encouraged to check this regardless of who you bank with
- You must have them arrange for your online banking to accept **Self balancing** bank files starting from the day of your migration to Property Tree
- This will avoid any rejected files on the day of your migration which could result in significant delays in getting critical payees paid
- **If** this option is set to **Self Balancing-Auto** you do not need to action anything

- **Tenant Download**

- If you use Tenant download in REST you will need to ensure you check your configuration and bank details and communicate with your Bank to check any changes that may be required to the tenant download file formats
- go to **Other > Utilities > Company Details > Charges/Taxes**
- Under Bank Download click on **Configure/View**
- check the Bank configuration
- Some banks will require a change in their options to allow for tenant download file format that is compatible with Property Tree and you should arrange to contact your Bank to ensure a smooth transition
- **Note:** For some banks (eg Westpac .erp Recall files) the file format will need to be changed after the final tenant download in REST and before final migration to Property Tree. The change to file format within the banking software may take from 24-48 hours to take effect. You should discuss with your Bank if there are any options that can be used in the interim so that manual receipting is avoided until the changes are effected.

- **Auto Bond Reconciliation**

- **Other > Utilities > System Options > System > Auto Bond Reconciliation**
- If you are using Auto Bond Reconciliation for both residential and commercial, ensure that you have configured the Auto Bond Reconciliation for Both and have a default creditor assigned.
- If bonds are not receipted into Rest Professional, they will migrate to Property Tree as outstanding, audit your bonds and ensure to fill in the bond collected field on the Tenant Masterfile's manually if this is the case.

- **Fees**

- **Other > Utilities > Agency Fee Configuration**
- These fees will migrate as your default new tenancy fees. In Property Tree they will apply to all

new profiles entered. Audit the fees for name and if GST should be inclusive.

- **Other > Utilities > Company Details > Internal Accounts**
- Audit your internal accounts used for fees to ensure that they are migrating correctly with GST attached as appropriate.

## Communication Options

- **Statements**

- **Other > Utilities > System Options > Statements > Email Owner Statements**
- In order to ensure that you can make use of Property Trees automated communications, you will need to deselect the Print emailed owner statements check box.
- If you are a File Smart user you will need to deselect this after your final EOM statement run and prior to your Files Update.

- **Communications Method - Owners**

- **Owner File > General > Communication > Send Statement by/Send Income & Expenditure Report by**
- Audit your Owner communication settings on your Masterfile's in order to ensure the correct communication method migrates to Property Tree.
- If your owner statements and/or income & expenditure summaries are both selected to send by Email OR Post, this will be the communication method migrated to Property Tree.
- If either option is set to Email, Email will be the communication option migrated to PT for both. Email for both is recommended.

- **Tenancy Invoices**

- **Other > Utilities > System Options > Transactions > Email all invoices as default**
- **Other > Utilities > System Options > Statements > Email Tenant Statements**
- In order to be automatically email invoices and receipts to tenancy contacts in Property Tree you will need to ensure Email all invoices and Email Tenant Statements as default is ticked.

## Other Options

- **Owner, Property and Tenant Defaults**

- **Other > Utilities > Company Details > Defaults > Owner, Property and Tenant Defaults section**
  - Ensure all your defaults are current and accurate
- **Inspection Frequency field**
  - If the Inspection Default is set, your tenants will all migrate without having any override settings unless they are different to the default

- If the Inspection Default is left blank, your tenants will all migrate to override the company default as this could not be determined
- If you are unsure, please speak to your consultant

- ***Enforce Unique Alphas***

- **Other > Utilities > System Options > Miscellaneous > Enforce unique alphas**
- It is imperative that this system option is checked. It must be **ticked** and Unique Alphas enabled before your final migration.
- When accessing the Miscellaneous tab > You can check this option without having to enter a response code that you will be prompted for
  - If the option is **ticked** there is nothing further to action
  - If the option is **unticked** you must seek a response code from either support or your consultant which will enable you to get a list of duplicated alphas for the entire Rest database which must be fixed before you can then go back into system options and enable this function. The function cannot be enabled until every duplicate is corrected for all the reported owners, tenants, properties, creditors, strata plans, etc.

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