

Purging Maintenance Requests Prior to Migrating to Property Tree

Any maintenance requests that are not completed or rejected will migrate from your Rest Professional data base into your new Property Tree account. This includes all work orders that may have been completed, but not completed or rejected within Rest Professional and are sitting at a pending or work order status.

Prior to migrating to Property Tree you may consider purging your historical maintenance requests to ensure that only the most recent and relevant information is migrated.

Once you purge your maintenance records they will be removed from your Rest Professional History, you can however print a report on all maintenance records or complete an audit back up to ensure you have access to the history if need be. You will also require a response code from Rockend in order to complete a purge of data.

Purging Maintenance Requests

Once you have completed an audit back up and retrieved the necessary reports to purge your maintenance requests simply follow the below steps.

- Navigate to Other > Utilities > Purge Records
- Read the Purge Records Note and Click OK
- Select your File to Purge > Property Maintenance File
- Select Purge and Compress
- Input your Purge to date, this will be the date before which all records will be purged.
- Click Advanced > Select the status' you wish to purge
- Click OK to proceed

A pop up will notify you of the Purge to date, how many records will be deleted and provide you the option to print/preview records first. We recommend that you Print your records from the Reports Menu prior to proceeding and store in a secure location.

Once you are ready to proceed you will be required to enter a response code word provided by Rockend, then hit OK.