

## Preparing your Data for Migration

Rockend has had over 35 years' experience with data migrations. We strive to make this process as seamless as possible. As with all data migrations, a successful outcome in Property Tree will depend upon the current state of the data in Rest Professional.

As part of your Property Tree migration you will participate in a **Trial** data migration. A trial review session will follow with your trainer to review your Rest database. This review will highlight what Rest data clean-up is required to be completed by your office before the final migration

Many offices take this opportunity to review their data integrity procedures and update any unconventional data practices and/or general clutter in Rest before moving to Property Tree.

After the **Final** data migration is complete, your trainer will advise you of any areas in Property Tree that require review before you start transacting in the new system.

We recommend that you begin preparing your data as soon as you are ready to migrate to Property Tree. The below outlines some areas that can be cleaned up prior to the Trial data migration.

### Master Files - Owners

- Archive any Ownership Files as applicable
- Ensure communication method for Income and Expenditure and Ownership Statements. **N.B.** *To make the most of Property Tree's Automated Communications Email is the preferred method for both*
- Ensure Ownership Address format follows the below format
  - Line 1: [Number] [Street Name] [Street Type]
  - Line 2: [Suburb] [State] [Postcode]
  - Line 3: only required if there is a "property name" (which comes first) then all other details shift down one line
- Split out multiple Ownership contacts - Refer to our knowledge base article on [Additional Owner Contacts Setup and Use in Rest Professional](#)
- Ensure ABN information and GST registration status is entered and accurate for Commercial Owners

### Master Files - Properties

- Archive any Property Files as applicable
- Ensure Portfolios are set up and accurate
- Property Tree can store smoke alarm and key information, as well as automate your routine inspections. To make the most out of Property Tree Audit and Check:
  - Key Numbers
  - Smoke Alarm information is entered and accurate
  - Inspection Dates & Times are entered and accurate

- Ensure Property Address format follows the below format:
  - Line 1: [Number] [Street Name] [Street Type]
  - Line 2: [Suburb] [State] [Postcode]
  - Line 3: only required if there is a “property name” (which comes first) then all other details shift down one line
- Ensure Property Reminders and Insurance Policy details are up to date and correct
- Check and update the Operator Receipting Reminder on the Notes Tab as required
- Ensure all Active/Current properties do not have unnecessary 'Management Lost' information such as dates, reasons, comments etc. to avoid them being migrated as lost managements.
  - To check this, an export of property data to excel can then be filtered to ensure no current/active properties have any management lost information
  - This is sometimes the case with properties that have been through a change of ownership and retained the management, however, there was management lost information added to the property prior to the settlement being processed which causes this to be copied to the current/active property
  - To fix this, remove all invalid / unnecessary lost information from the Gained/Lost tab of the property. If you do not have a lost date entered, but do have a lost reason entered, you will need to type in a lost date to enable the lost reason field to be enabled/changed, you can then remove the typed lost date

## **Master Files - Tenancies**

- Archive any Tenancy Files as applicable
- Split out multiple Tenancy contacts - Refer to our knowledge base article on [How to Add a Contact to an Existing Tenant Details](#)
- Audit and update;
  - Tenancy Lease Dates
  - Tenancy Rent Review Dates
  - Any scheduled changes to rent
- Enter all Vacate Dates for terminated or vacating tenancies
- Ensure all vacating, lease break and vacated tenants have all overpaid rent and outstanding amounts cleared and they are archived
- Ensure all tenants with a Termination date only (no vacate date) are genuine and still valid, if not ensure the termination date is removed
- Ensure all tenants with a Lease break date only (no vacate date) are genuine and still valid, if not ensure the date is removed
- Update tenant preferences for 'Consent to the electronic service of notices'

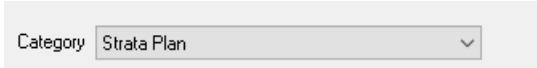
## Master Files - Creditors

- Archive any Creditor Files as applicable
- Ensure Address format follows the below format:
  - Line 1: [Number] [Street Name] [Street Type]
  - Line 2: [Suburb] [State] [Postcode]
  - Line 3: only required if there is a “property name” (which comes first) then all other details shift down one line
- Audit and Update Creditor Payment Information

## Master Files - Strata Plans

- Archive any Strata Plans no longer in use
- Audit and update Strata Plans with Managing Agent details or leave this section blank and deselected if the plan is self managed
- In order to ensure all Strata Plans successfully migrate to Property Tree, you must ensure confirm the following:
  - Each Strata Plan must also have a Creditor file Set up for that Strata Plan
  - The Strata Plan number **must** be set as the Creditor Alpha Code. For example the Strata Plan Number is '12345', then the Creditor Alpha for that Strata Plan must be 'SP12345'

Strata Plan	Creditor Details
Plan Number <input type="text" value="13846"/>	Alpha index <input type="text" value="SP13846"/>

- The Creditor for the strata plan **must** have the Creditor Category set to **Strata Plan**  

- Therefore, so long as the Strata Plan number matches the Creditor Alpha Code in Rest Professional (eg. SP12345 or 12345) and the Creditor **also** has the default category of Strata Plan selected, then the Creditor will be migrated to Property Tree and converted to be a Strata Creditor and in addition, the Properties that are linked to that Strata Plan will link to the strata creditor when it migrates
- Audit and update Creditor Details and Payment Information

## Preparing for Go Live

- Prepare your Company and User Branding for Property Tree
  - Logo should be either **jpg** or **.png** format, **400KB** maximum file size and recommended dimensions of 400 x 120 pixels
  - Company Banner should be either **jpg** or **.png** format, **400KB** maximum file size and recommended dimensions of 400 x 120 pixels
  - User Banner should be **jpg** or **.png** format and be a maximum of 750 x 210 pixels in size.

- When you move to Property Tree you will need to update your Mail Merge templates with Property Tree Merge Fields. It is a good idea to audit your templates and remove any unnecessary templates prior to the migration
- If you are using Rockend SMS you will need to notify Edgility of your end date with Rest Professional. Property Tree uses an in-app SMS feature that you can activate as you go live with Property Tree
- At the trial migration you may be directed by your consultant to change certain system options. This will ensure that you are able to make the most of the automated communications and accounting options.
- If you would like to use Property Tree's Inspections API an arrangement must be made with a 3rd party provider to sync inspections with.
- Notify Owners, Tenants and Creditors of the software change

27/04/2022 6:24 pm AEST