

Rockend SMS Enhanced Integration

SMS for Rest Professional

Rockend SMS has newly designed and developed an upgrade to the way you send SMS through Rest Professional V14 and above (Rockend SMS Enhanced Integration). Incorporating features such as, multipart messages – not limited to 160 characters, view SMS history from within Rest Professional, easily switch ON/OFF SMS replies and more.

The Rockend SMS Enhanced Integration also moves away from the traditional email-2-SMS method, meaning it no longer uses Outlook to send SMS from Rest Professional. This new method of sending also increases message delivery speed, reliability and functionality.

SMS messaging from Rest Professional can be sent three ways:-

1. Individual Messaging via Contact Details Screen
2. Bulk Merge Messaging via Print Letters/Mail Merge
3. Inspections Notifications via the Inspections Planner and Follow Up

REST PROFESSIONAL SMS SET-UP CHECKLIST

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1. ☐ Security levels for Rockend SMS Enhanced Integration Users *[page 2]*
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3. ☐ Adding users to the Rockend SMS Online Portal *[page 4]*
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Important Note for users of Rockend SMS

Please Note; Staff members intending to use the Rockend SMS Enhanced Integration function will need to cover off on items 1, 2, 3 and 4 from the checklist above at a minimum.

1 SECURITY LEVELS FOR ROCKENDSMS ENHANCED INTEGRATION USERS

Rockend SMS Enhanced Integration has been introduced in Rest Professional Version 14, to enable you to send SMS via your Rockend SMS Online Portal without the need to leave Rest Professional.

To ensure you have the appropriate security levels in Rest Professional to complete the *Rockend SMS Third Party Configuration* please refer to the [Enhanced Rockend SMS Setup and use guide](#) or access the Rest Professional **Help File** from Rest.

Refer to security level guide below for sending and managing SMS via Rockend SMS Enhanced Integration;

	Rockend SMS Security Levels	
	User	Administrator
Create Rockend SMS Users	✗	✓
Manage Rockend SMS Users	✗	✓
Send Single SMS in Rest Professional	✓	✓
Send Bulk SMS in Rest Professional	✓	✓
Create Global Templates	✗	✓
Manage Global Templates	✗	✓
View Global reporting via Rockend SMS Online Portal	✗	✓
View Personal reporting via Rockend SMS Online Portal	✓	✓
Create Cost Centres via Rockend SMS Online Portal	✗	✓
Manage Cost Centres via Rockend SMS Online Portal	✗	✓
Manage Account SMS Threshold Notifications	✗	✓

2 CHECK AND ADD USERS IN REST PROFESSIONAL

Prior to setting up users in the Rockend SMS Online Portal, ensure they are registered and active in Rest Professional first. To check the Rest Professional user list, go to:

File > Users > Search

List of registered users in Rest Professional will be displayed here.

ⓘ Please Note:

If a user does not appear in the list, contact your Office Administrator to set-up the Rest Professional Users.

User Search

Enter a name or partial name to search

Maria DeBari (MD)	Statistics/Company Details/Passwords & above
Peter Antoniou (PA)	Statistics/Company Details/Passwords & above
Stephanie Nasca (SN)	Statistics/Company Details/Passwords & above

Display active or inactive Users

Active

Items found: 3

OK Cancel

User Search Screen in Rest Professional

3 ADDING USERS TO THE ROCKEND SMS ONLINE PORTAL

Once users have been added to Rest Professional, you will need to add these to your Rockend SMS account if they do not already exist. This is a simple process and is usually performed by the account administrator by logging into www.rockendsms.com.au and navigating to **User Management**:

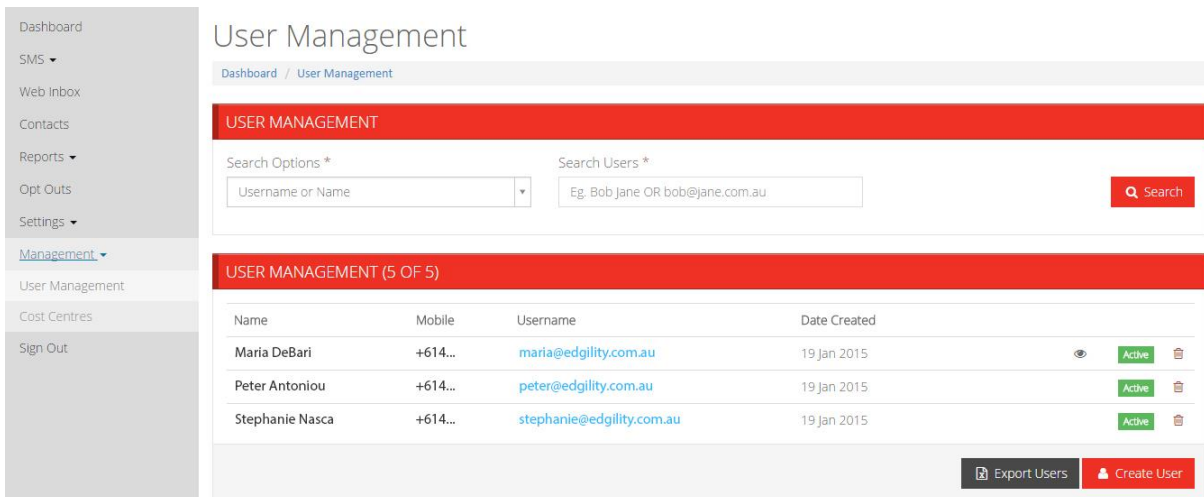
Management > User Management

Click on **Create Users** input the users details – name, email address and mobile number (not mandatory) and click **Save All**

Once saved this will automatically send a Welcome email to each new user containing information such as Rockend SMS username, password and API details which will be used in the Rockend SMS set-up of Rest Professional.

Please Note:

If unsure of user's set-up please email Rockend SMS support at support@edgility.com.au with name and email address of user(s) you would like to add to the account.



The screenshot shows the 'User Management' interface. On the left is a sidebar menu with options: Dashboard, SMS, Web Inbox, Contacts, Reports, Opt Outs, Settings, Management (selected), User Management, Cost Centres, and Sign Out. The main content area is titled 'User Management' and includes a breadcrumb 'Dashboard / User Management'. Below this is a red header bar labeled 'USER MANAGEMENT'. Underneath are search options: 'Search Options *' with a dropdown menu set to 'Username or Name', and 'Search Users *' with a text input containing 'Eg. Bob Jane OR bob@jane.com.au' and a red 'Search' button. Below the search bar is another red header bar labeled 'USER MANAGEMENT (5 OF 5)'. This is followed by a table with columns: Name, Mobile, Username, Date Created, and a status column. The table lists three users: Maria DeBari, Peter Antoniou, and Stephanie Nasca, all created on 19 Jan 2015 and marked as 'Active'. At the bottom right of the table are two buttons: 'Export Users' and 'Create User'.

Name	Mobile	Username	Date Created	Status
Maria DeBari	+614...	maria@edgility.com.au	19 Jan 2015	Active
Peter Antoniou	+614...	peter@edgility.com.au	19 Jan 2015	Active
Stephanie Nasca	+614...	stephanie@edgility.com.au	19 Jan 2015	Active

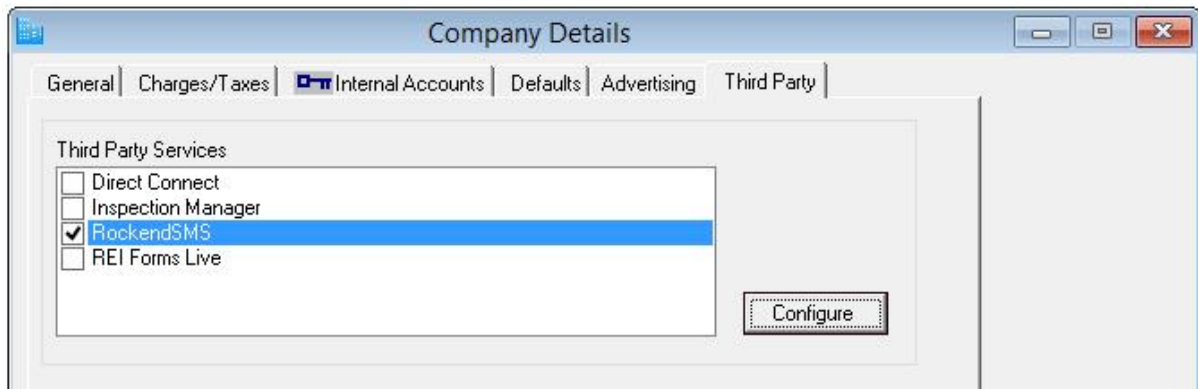
User Management Screen in Rockend SMS Online

4 CONFIGURING REST PROFESSIONAL TO ALLOW SMS FUNCTIONALITY

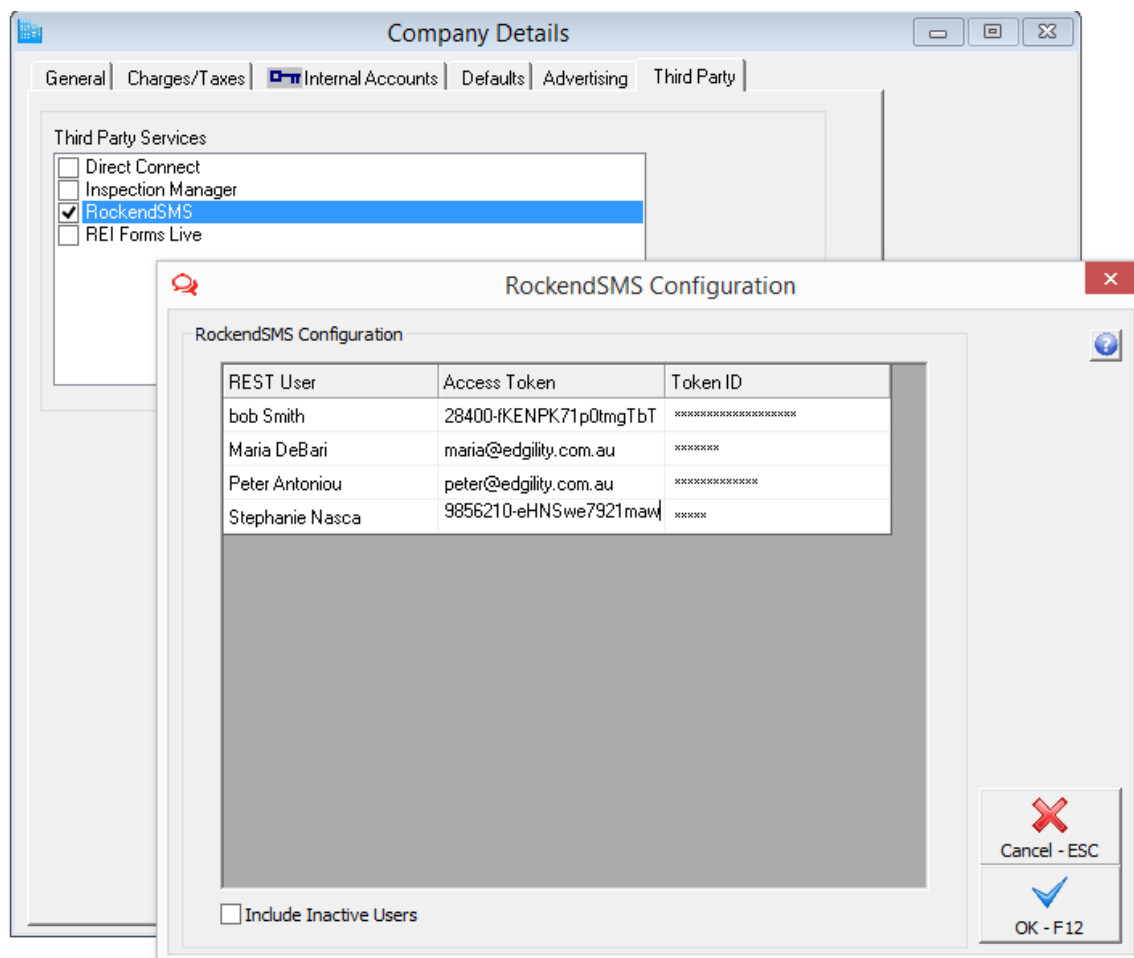
Once users have been added to Rest Professional and the Rockend SMS Online Portal, within Rest Professional go to:

Other > Utilities > Company Details > Third Party

Check the Rockend SMS checkbox and click **Configure**



Third Party tab in company details of Rest Professional



Rockend SMS Configuration Screen within Rest Professional

All Rockend SMS users will be listed in the Rockend SMS Configuration Screen.

Each user's Rockend SMS API - *Access Token* and *Token ID* needs to be entered in the *Rockend SMS Configuration* screen. API details are included in the welcome email sent to each user when initially set-up in Rockend SMS Online Portal.

 Please Note:

If you do not have this email API details are accessible via the Rockend SMS Online Portal, simply login at www.rockendsms.com.au and go to:

Settings > API

and click on default **API Key**

For Administrator go to:

Management > User Management

and click on each user for API details

Once user details have been entered and/or updated, click OK.

5 SINGLE SMS IN REST PROFESSIONAL

You can send a single SMS message from any of the Rest Professional contact details screens.

5.1 CONFIGURING AND SENDING A SINGLE SMS

Open the contact details screen of your choice in Rest Professional.

Click on the mobile icon to the right of the mobile number field and the Rockend SMS Single Message Window will open.

Please Note:

Messages will be recorded in the *Action & Conversations Diary* for Owners, Tenants, Creditors, Holiday Bookings and Sales.

Tenant Details

Alpha index:

Lease name:

General | Rental | Bank | Inspections | Renegotiation | Notes/Mail/Reminder | Invoices | Commercial

Property: 53 Miller Street
Pyrmont NSW 2009
 Fred Bear

Contact

Name:

Salutation: Total contacts: 1

Date of Birth:

Home: Work:

Fax: Mobile: 

Email:

☒ Primary Contact ☒ Lease Contact ☒ Accounts Contact ☒ Repairs Contact

Lease

Short name: Bond required:

Original lease date: Vacating: Bond no:

Lease start date: Termination: Bond collected:

Lease end date: Lease break: Bond held:

Cancel - ESC
Action - F1
Clear - F2
Delete - F3
Add Mode - F4
Status - F6
Search - F7
Last Edits - F9
OK - F12

Tenant Details Screen in Rest Professional

Rockend SMS Single Message Screen within Rest Professional

5.1.1 Rockend SMS Single Message screen explained

1. Destination

Recipient's mobile number and contact name will appear here.

2. Use Template (Optional)

You can select a pre-saved template from the drop-down or compose your own message

3. Allow Replies / Sender ID

Set your reply options here:

Replies ON will send replies received to either a nominated mobile number or user email address. **Replies OFF** will not allow replies to your messages and use and Alphanumeric Sender ID. Manage these setting through the *Rockend SMS Online Portal*.

4. SMS Message

Compose your message in this area, keep note of the character count/message part. Messages can now be multi-part (exceed the 160 character count) each message part is equivalent to 1 SMS.

5. User logged in

This tells you which user has logged. These details determine which users the SMS messages are being sent from and replies come back to. If you need to change this you will need to abort the send, log out of Rest Professional and login using the correct details.

6. History

A log of all messages sent to and from the recipient's mobile number will appear here. Checking the *Show team communication* checkbox will update current history to display all messages sent to and from the number from all users on the account. If required, history can be printed from the Reports menu in the Rockend SMS Online Portal.

7. Schedule Options

By clicking the *schedule options* button you can elect to schedule the message for a later time and/or date. You may also set a recurring message via the *schedule option*. Please note; the first message sent as part of a recurring schedule will be added to the Action & Conversation Diary the following message will not.

8. Login to Rockend SMS

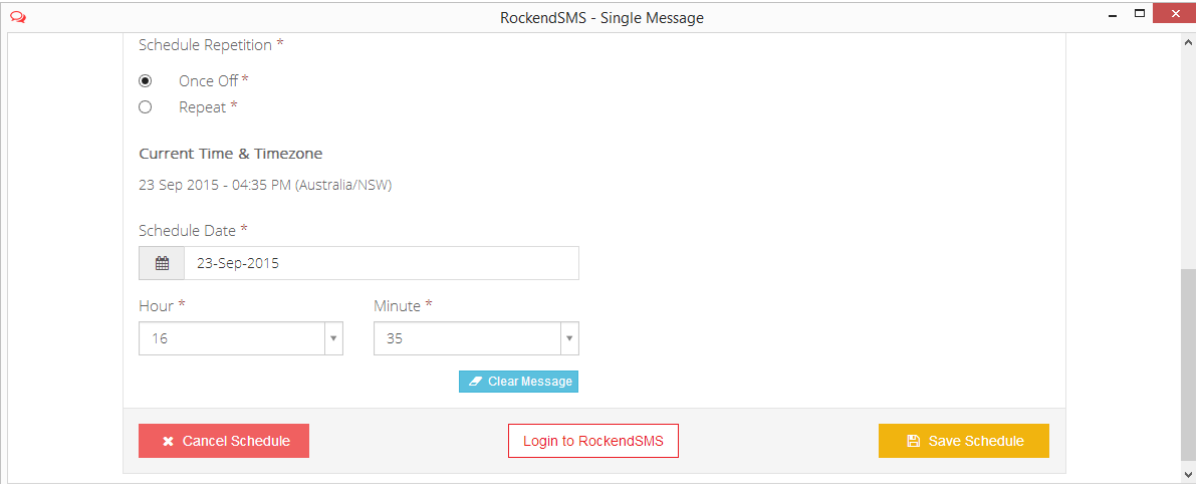
By clicking this button you will be directly logged into your *Rockend SMS Online Portal* account, where you will have full functionality of the online portal such as view reporting, web inbox, scheduled messages etc.

9. Send SMS

Clicking this button will display the confirmation screen. You will be prompted to agree to the terms and conditions before sending the SMS message.

5.1.2 Sending a Single SMS

1. Open the contact details screen of your choice in Rest Professional.
2. Click on the mobile icon, this will open the Rockend SMS-Single Message screen.
3. Select a pre-saved template or compose your own.
4. Set replies ON or OFF, if ON is selected, set your Sender ID from the dropdown.
5. Compose/review your message.
6. At this point you have two options;
  - a. Schedule your SMS
Click **Schedule Option** Button and set your parameters
Click **Save Schedule** to have your SMS sent on the scheduled date/time

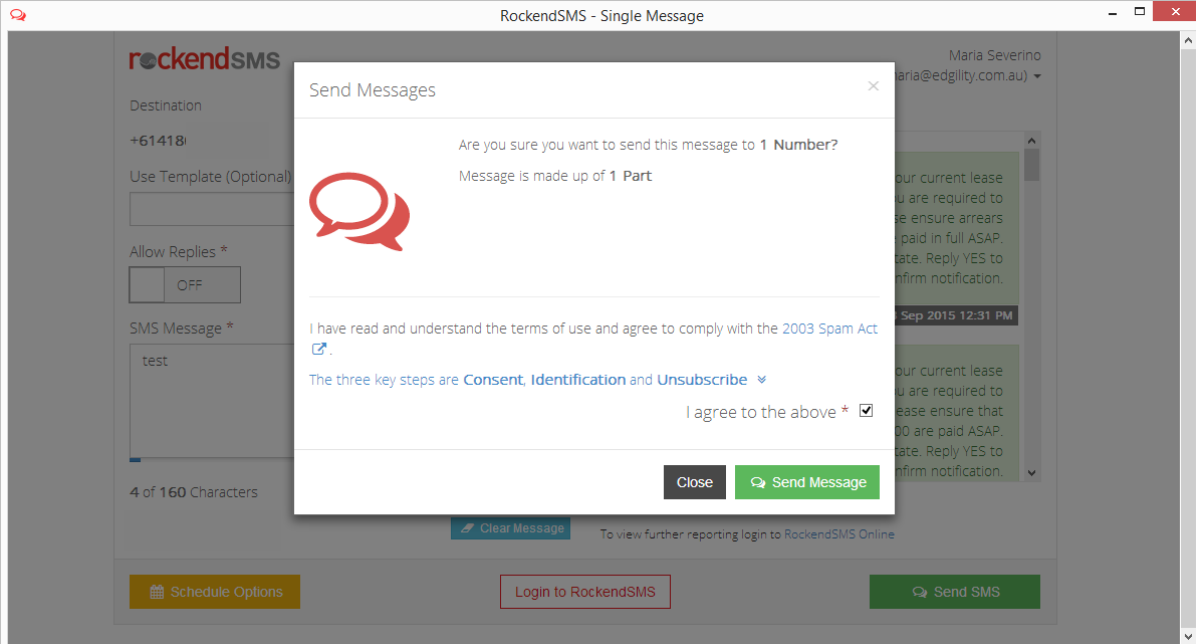


The screenshot shows the 'RockendSMS - Single Message' window. It has a sidebar on the left with a search icon. The main area contains the following fields and buttons:

- Schedule Repetition ***: Radio buttons for 'Once Off *' (selected) and 'Repeat *'.
- Current Time & Timezone**: Displays '23 Sep 2015 - 04:35 PM (Australia/NSW)'.
- Schedule Date ***: A date picker showing '23-Sep-2015'.
- Hour ***: A dropdown menu showing '16'.
- Minute ***: A dropdown menu showing '35'.
- Buttons**: 'Clear Message' (blue), 'Cancel Schedule' (red), 'Login to RockendSMS' (white with red border), and 'Save Schedule' (yellow).

b. Send SMS

- Click **Send SMS**, the SMS confirmation window will appear
Check the checkbox to agree to the terms and click **Send SMS**



The screenshot shows the 'RockendSMS - Single Message' window with the 'Send Messages' dialog box open. The dialog box contains the following information:

- Title**: Send Messages
- Text**: 'Are you sure you want to send this message to 1 Number?' and 'Message is made up of 1 Part'.
- Image**: RockendSMS logo.
- Text**: 'I have read and understand the terms of use and agree to comply with the 2003 Spam Act' with a link icon.
- Text**: 'The three key steps are Consent, Identification and Unsubscribe' with a dropdown arrow.
- Text**: 'I agree to the above *' with a checked checkbox.
- Buttons**: 'Close' (grey) and 'Send Message' (green).

The background window shows the 'Destination' field with '+61418', 'Use Template (Optional)' field, 'Allow Replies *' set to 'OFF', 'SMS Message *' field with 'test', and '4 of 160 Characters' remaining. At the bottom, there are buttons for 'Schedule Options', 'Login to RockendSMS', and 'Send SMS'.

5.2 REPLY OPTIONS FOR SINGLE SMS

Rockend SMS users now have the full spectrum of reply options available;

a) Alphanumeric Sender ID

(Replies OFF)

Allow Replies *

☐ OFF

Clients have the ability to set alphanumeric Sender IDs. These are a minimum 5 and maximum 10 characters and can contain a combination of Letters and Numbers. Message with an Alphanumeric Sender ID CAN NOT be replied to as they do not contain a valid mobile number. Any Sender ID will need to be verified in Rockend SMS Online Portal. To manage and add Sender IDs with Rockend SMS Online Portal, go to:

Settings > Allowed Sender IDs

NOTE: no symbols or spaces accepted

b) Mobile Number

(Replies ON – Replies are sent to a nominated mobile number)

Allow Replies *

☒ ON

Clients are able to nominate a mobile number that replies can be directly sent to. Any mobile numbers used as a Sender ID will need to be verified in Rockend SMS Online Portal:

Settings > Allowed Sender IDs

NOTE: All replies are recorded in your Web Inbox in the Rockend SMS Online Portal

c) Reply to Email

(Replies ON – Replies are sent to the logged in user's email address)

Allow Replies *

☒ ON

Replies can now be sent directly back to the user's email inbox. This feature is enabled when the users is set-up in Rockend SMS Online Portal; this can be disabled in Rockend SMS Online Portal:

Settings > Profile & Settings (under notifications)

NOTE: All replies are recorded in your Web Inbox in the Rockend SMS Online Portal

Please Note:

When replies are enabled (Switched ON) the replies are visible in the *History* box in the single SMS sending screen in Rest Professional. By checking the *Show team communication* checkbox all messages sent as well as all replies from all users to the recipient will be visible in the *History* box.

6 BULK/MAIL MERGE SMS IN REST PROFESSIONAL

Using the Print Letters / Mail Merge feature in Rest Professional to send bulk SMS messages to owners, tenants, creditors or holiday bookings.

6.1 CONFIGURING AND SENDING A BULK/MAIL MERGE SMS

Within Rest Professional navigate to Print Letters/Mail Merge from the *Other* menu:

Other > Print Letters/Mail Merge

Select the *Type of Letter*, be sure *Mobile Number* is set to valid and *Output* set to SMS. Once you have populated valid fields, click **Preview**

Please Note:

You must check the *Update tenant history* checkbox to add messages to tenant ledgers. All messages are automatically saved in the Action & Conversation Diary.

Print Letters / Mail Merge

Merge with: Tenant

Type of Letter: Arrears

Contact: Accounts

Manager: All

Property Type: All

☐ Sort and filter by Area Code Area Code

All

Filter

Arrears Date: 23/09/2015

☒ Use effective arrears

OR Days in Arrears: 1 to 999

Email address: All

Mobile number: Valid

Include Invoices: Rent + Invoices

Include Vacated: ☐

Selection

Status: Active

Property order: ☐

☒ All

☐ Range Start at Alpha Index Finish at Alpha Index

☐ Select

Output

☐ Mail Merge

☐ Email

☒ SMS

☐ Update tenant history

Cancel - ESC

Preview - F11

Start - F12

Print Letter/Mail Merge Screen in Rest Professional

RockendSMS - Bulk Message

rockendSMS 6 Maria Severino
Admin (maria@edgility.com.au) ▾

- Messaging
  - 2 Contacts selected ▾
- Use Template (Optional)
- Allow Replies * Sender ID *

OFF RealEstate ▾
- SMS Message *

0 of 160 Characters 1 Message Parts

[Clear Message](#)

Please be aware that some messages with long merged data fields may result in multiple parts.

Select one or more merge fields below

  - General Contact Details

Salutation
  - Tenant Details

PrevinsDate NxtInsDate InspectionTimeFrom InspectionTimeTo TypeOfInspection InspectingAgent

NxtInsDayOfWeek TenantLeaseBreakDate
  - Property Details

PropManager PropManagerMobile PropManagerEmail PropAdd1 PropAdd2 PropAdd3 PropSuburb PropState

PropPCode PropSmokeAlarmDate PropWaterEfficientInspDate
  - Owner Details

OwnrSalut
  - Lease Details

LeaseStDate LeaseExpDate VacateDate Termination Date RentAmt1 RentArrs1 RentDueDate1 ArrearsDays1

TenantVacateArrears1 EffectivePaidToDate1 RentPdFrom1 RentPdTo1 TotInvBal TotArrears LastPaidDate

LastPaidAmt RenegApproved1 NewRentAmt1 NewRentPer1 Invoice Credit Held Rent Review LastRentReview

Bond Bond No
  - Agency Details

AgentName

To view further reporting login to RockendSMS Online

  - [Schedule Options](#)
  - [Login to RockendSMS](#)
  - [Send SMS](#)

Rockend SMS Single Message Screen within Rest Professional

6.1.1 Rockend SMS Bulk Message screen explained

1. Messaging

This will show you the number of contacts you will be sending your message to.

2. Use Template (Optional)

You can select a pre-saved template from the drop-down or compose your own message

3. Allow Replies / Sender ID

Set your reply options here:

Replies ON will send replies received to either a nominated mobile number or user email address. **Replies OFF** will not allow replies to your messages and use an Alphanumeric Sender ID.

Manage these settings through the *Rockend SMS Online Portal*.

4. SMS Message

Compose your message in this area, keep note of the character count/message part. Messages can now be multi-part (exceed the 160 character count) each message part is equivalent to 1 SMS.

5. Merge fields

Merge data available for you to use in message composition. Simply click on the merge button you wish to use to insert in the *SMS Message* area.

6. User logged in

This tells you which user is logged in. These details determine which users the SMS messages are being sent from and replies come back to. If you need to change this you will need to abort the send, log out of Rest Professional and login using the correct details.

7. Schedule Options

By clicking the *schedule options* button you can elect to schedule the message for a later time and/or date. You may also set a recurring message via the *schedule option*. Please note; the first message sent as part of a recurring schedule will be added to the Action & Conversation Diary the following message will not.

8. Login to Rockend SMS

By clicking this button you will be directly logged into your *Rockend SMS Online Portal* account, where you will have full functionality of the online portal such as view reporting, web inbox, scheduled messages ect.

9. Send SMS

Clicking this button will display the confirmation screen. You will be prompted to agree to the terms and conditions before sending the SMS message.

6.1.2 Sending a Bulk / Mail Merge SMS

1. Click on Other > Print Letters / Mail Merge in Rest Professional.
2. Select your filters, be sure *Mobile Number* is set to valid and *Output* set to SMS. Once you have populated valid fields, click **Preview**
3. In the SMS Preview window select the recipients you intend to SMS.
4. Select a pre-saved template or compose your own message.
5. Set replies ON or OFF, if ON is selected, set you Sender ID from the dropdown.
6. Compose/review your message.
7. At this point you have two options;
  - a. Schedule your SMS
Click **Schedule Option** Button and set your parameters
Click **Save Schedule** to have your SMS sent on the scheduled date/time

The screenshot shows the 'RockendSMS - Bulk Message' window. It has a 'Schedule Repetition' section with 'Once Off' selected. Below it, 'Current Time & Timezone' is '23 Sep 2015 - 05:27 PM (Australia/NSW)'. The 'Schedule Date' is '23-Sep-2015'. There are dropdowns for 'Hour' (17) and 'Minute' (27). A 'Clear Message' button is on the right. At the bottom, there are 'Cancel Schedule', 'Login to RockendSMS', and 'Save Schedule' buttons. A note at the bottom says: 'Please be aware that some messages with long merged data fields may result in multiple parts.'

b. Send SMS

Click **Send SMS**, the SMS confirmation window will appear
Check the checkbox to agree to the terms and click **Send SMS**

The screenshot shows the 'RockendSMS - Bulk Message' window with a 'Send Messages' dialog box open. The dialog asks 'Are you sure you want to send this message to 1 Number?' and 'Message is made up of 1 Part'. It includes a red speech bubble icon. Below the text, it says 'I have read and understand the terms of use and agree to comply with the 2003 Spam Act' with a link. It also lists 'The three key steps are Consent, Identification and Unsubscribe'. At the bottom of the dialog is a checkbox 'I agree to the above' and 'Close' and 'Send Message' buttons. The background window shows various property and owner details.

6.2 REPLY OPTIONS FOR BULK / MAIL MERGE SMS

Rockend SMS users now have the full spectrum of reply options available;

a) Alphanumeric Sender ID

(Replies OFF)

Allow Replies *

☐ OFF

Clients have the ability to set alphanumeric Sender IDs. These are a minimum 5 and maximum 10 characters and can contain a combination of Letters and Numbers. Message with an Alphanumeric Sender ID CAN NOT be replied to as they do not contain a valid mobile number. Any Sender ID will need to be verified in Rockend SMS Online Portal. To manage and add Sender IDs with Rockend SMS Online Portal, go to:

Settings > Allowed Sender IDs

NOTE: no symbols or spaces accepted

b) Mobile Number

(Replies ON – Replies are sent to a nominated mobile number)

Allow Replies *

☒ ON

Clients are able to nominate a mobile number that replies can be directly sent to. Any mobile numbers used as a Sender ID will need to be verified in Rockend SMS Online Portal:

Settings > Allowed Sender IDs

NOTE: All replies are recorded in your Web Inbox in the Rockend SMS Online Portal

c) Reply to Email

(Replies ON – Replies are sent to the logged in user's email address)

Allow Replies *

☒ ON

Replies can now be sent directly back to the user's email inbox. This feature is enabled when the users is set-up in Rockend SMS Online Portal; this can be disabled in Rockend SMS Online Portal:

Settings > Profile & Settings (under notifications)

NOTE: All replies are recorded in your Web Inbox in the Rockend SMS Online Portal

Please Note:

When replies are enabled (Switched ON) the replies are visible in the *History* box in the single SMS sending screen in Rest Professional. By checking the *Show team communication* checkbox all messages sent as well as all replies from all users to the recipient will be visible in the *History* box.

7 INSPECTION PLANNER AND FOLLOW UP SMS IN REST PROFESSIONAL

Once you have configured Rest Professional to allow SMS functionality [page 4] your Inspection Planner configuration screen should reflect the below. Access your Inspection Planner configuration screen by going to:

Files > Inspections > Inspection Planner Configuration

Inspection Planner Configuration

This screen stores some of the default load settings for the Inspection Planner, as well as the templates for sending notifications to owners and tenants for scheduled and completed inspections.

Select the Help icon for detailed notes on how to set up Inspection Planner Configuration.

Default Load

Inspections

☒ Include Inspections with blank Frequency or blank Next Inspection Dates

Next Inspection Dates

☐ Current Period

☐ Next 30 days

☐ Next 60 days

☒ Next 90 days

Default Communication Methods and Templates

Owners

Inspection Invitation to Owner

☒ Letter

☒ Email

☒ SMS

Inspection Follow up to Owner

☒ Letter

☒ Email

☒ SMS

Tenants

Inspection Notification to Tenant

☒ Letter

☒ Email

☒ SMS

Inspection Follow up to Tenant

☒ Letter

☒ Email

☒ SMS

Inspection Planner Configuration within Rest Professional

7.1 SENDING SMS VIA THE INSPECTION PLANNER

Sending SMS via the Inspection Planner for Rockend SMS Enhanced Integration users.

① Please Note:

The logged in user must have the security level of Receipts / Invoices / Banking / Repairs / Wizards & above to use the Inspection Planner

Within Rest Professional navigate to Inspection Planner:

Files > Inspections > Inspection Planner

Review and edit information for upcoming inspection and select the inspections you wish to schedule or reschedule in the **Schedule Tab**

Select the communication methods for notifications to be sent out to tenants for their upcoming inspections in the **Notify Tenant tab**.

① Please Note:

The default communication method for Tenants is Letters. To bulk update the method of communication go to;

Other > Utilities > Global Changes > Inspections

The **Notify Owner tab** will become active when Invite Owner has been selected for at least one inspection in the previous tab.

Inspection Planner

The 5 steps of the Inspection Planner will allow you to review and schedule inspections, notify tenants, invite owners, update diaries and create a history of scheduled inspections.

To schedule an inspection, ensure the Frequency and Next Inspection Date are correct, and set the times before selecting the status of Send Notice. This will enable the next step, where you can notify tenants and owners of inspection details. To send notifications for rescheduled inspections, select the status of Reschedule.

Select the Help icon for detailed notes on how to use the Inspection Planner.

Inspection Comment for Sookie Stackhouse
Periodically check rising damp in 2nd bedroom.
Use keys for inspection - tenant will not be home. - TC 01.04.15

Next Inspection From: 24/04/2015 To: 24/05/2015

Area Code: All

Property Manager: All

Inspecting Agent: All

Class: All

Refresh

Schedule Notify Tenant Notify Owner Merge & Send Finalise

PM	IA	Property Alpha	Property Address	Suburb	Last Insp	Freq	Type	Status	Next Insp	From	To	Tenant Name
LX	LX	VIEW172	172 View Street	ANNANDALE	02/02/2009	M3	Routine	Send Notice	02/04/2015	12:00 AM	12:00 AM	Sookie Stackhouse
LX	LX	LOUISA16/7	7/16 Louisa Road	BIRCHGROVE	07/02/2008	M3	Routine	Pending	08/04/2015	12:00 AM	12:00 AM	Jessica Alba
LX	LX	HUDSON10/1	Suite 1 / 10 Hudson Street	ST LEONARDS	11/01/2010	M3	Routine	Pending	12/04/2015	12:00 AM	12:00 AM	Ray Romano
LX	LX	HOSK14/28	28/14 Hosking Street	BALMAIN EAST	11/01/2010	M3	Routine	Pending	12/04/2015	12:00 AM	12:00 AM	Orlando Bloom
LX	LX	WYLDE3A	3A Wyldie Street	POTTS POINT	18/01/2010	M3	Routine	Pending	19/04/2015	12:00 AM	12:00 AM	Johnny Depp
LX	LX	BEACH96	96 Beach Street	COOGEE BEACH	17/01/2010	M3	Routine	Pending	19/04/2015	12:00 AM	12:00 AM	Clive Owen
LX	LX	BROS25/11	11/25 Brosnan Place	BRIGHTON LE S...	25/01/2010	M3	Routine	Pending	26/04/2015	12:00 AM	12:00 AM	Jessica Simpson
LX	LX	WELLS19	19 Wells Street	BALMAIN	25/01/2010	M3	Routine	Pending	26/04/2015	12:00 AM	12:00 AM	Jake Gyllenhaal & Kirsten D...

View Property View Tenant

Bulk update Status to: Pending Update Save Save & Close

Inspection Planner Screen within Rest Professional

Merge & Send

To send out the notifications to tenants and owners for upcoming inspections:

1. Review the number of owners and tenants for each communication method to ensure all the notifications you wish to send out now are included. Return to the previous tabs to make changes if necessary.

① Please Note:

After starting the Merge & Send process on this tab, you will no longer be able to return to the previous tabs of the Inspection Planner, so it is important to ensure that the summary is correct before selecting the Merge/Send button to start the first merge.

2. When you are ready to start the merge process, select the Merge/Send button for the first notification. The Inspection Notification screen will display. This is a simplified version of the Print Letters /Mail Merge screen in Rest.

① Please Note:

The default selection for SMS messages will be set to SMS and the output cannot be changed.

3. Select the Preview button to review the records that will be included in the merge.
4. Complete the merge process by selecting:

Preview > Proceed Button for SMS Messages

This will load the Rockend SMS Bulk Message Screen.

From here you may select the template you wish to use from ***Use Templates*** dropdown and proceed to ***Schedule Options*** or ***Send SMS***.

Rockend SMS Bulk Message Screen within Rest Professional

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7.2 SENDING SMS VIA THE INSPECTION FOLLOW UP

To use Inspection Follow Up for the first time, inspections must have been previously scheduled using the **Inspection Planner**.

ⓘ Please Note:

Inspection Follow Up must be completed by a user with the security level of Receipts / Invoices / Banking / Repairs / Wizards and above.

Within Rest Professional navigate to **Inspection Follow Up**:

Files > Inspections > Inspection Follow Up

The first step in **Inspection Follow Up** is the **Review & Update tab**, which allows you to review and edit information for completed inspections, review and edit Inspection Fees to the owner, and select the inspections you wish to finalise.

The **Advise Owner tab** will become active when at least one inspection on the **Review & Update tab** has a status of Complete. This is an optional step which allows you to specify communication methods for owners who will be sent follow up notifications of completed inspections.

ⓘ Please Note:

Inspection Comments entered here will be added to the Property and Tenant Diary at the Finalise step of Inspection Follow Up. You need to Finalise for these comment to be saved.

The **Advise Tenant tab** will become active when **Advise Tenant** has been selected for at least one inspection in the previous tab.

When you have set all the communication methods for tenants to be sent follow up notifications you are ready to proceed to the **Merge & Send tab**.

Inspection Follow Up

The 5 steps of the Inspection Follow Up will allow you to review, update and finalise completed inspections, reschedule inspections, advise owners and tenants of the completed inspection, edit and create maintenance jobs, update diaries, charge Inspection Fees to owners and create a history of completed inspections. Select Advise Owner to add Inspection Comments for Property and Tenant diaries.

To complete an inspection, ensure the date of the inspection is correct and set the status to Complete.

Select the Help icon for detailed notes on how to use Inspection Follow Up.

Update Inspections From: 25/02/2015 To: 24/04/2015

Area Code: All

Property Manager: All

Inspecting Agent: All

Class: All

Refresh

Review & Update Advise Owner Advise Tenant Merge & Send Finalise

PM	IA	Property Alpha	Property Address	Suburb	Type	Status	Fee (Incl.)	Date	From	To	Tenant Name
		STAT13PROP	Statement13 Property	SUBURB	Routine	Scheduled	\$0.00	19/05/2011	12:00 AM	12:00 AM	Stat13 Tenant
LX	LX	BAY23/04	4/23 Bay Street	BALMAIN	Ingoing	Complete	\$0.00	15/04/2015	12:00 AM	12:00 AM	Brad Pitt & Angelina Jolie
CK	CK	WARA10/1	1 / 10 Waratah Street	KIRIBILLI	Routine	Scheduled	\$25.00	22/04/2015	12:00 PM	12:30 PM	Ma Cathy Freeman
CK	CK	GIBSON40/2	2/40 Gibson Street	NORTH SYDNEY	Routine	Scheduled	\$25.00	23/04/2015	12:00 PM	12:30 PM	Gael Garcia Bernal

View Property View Tenant View Maintenance

Bulk update Status to: Scheduled Update Save Save & Close

Inspection Follow Up Screen within Rest Professional

Merge & Send

To send out the notifications to tenants and owners for completed inspections:

1. Review the number of owners and tenants for each communication method to ensure all the notifications you wish to send out now are included. Return to the previous tabs to make changes if necessary.

Please Note:

After starting the Merge & Send process on this tab, you will no longer be able to return the previous tabs of Inspection Follow Up, so it is important to ensure that the summary is correct before selecting the Merge/Send button to start the first merge.

2. When you are ready to start the merge process, select the **Merge/Send** button for the first notification. The **Inspection Notification** screen will display. This is a simplified version of the Letter Writing screen in Rest.

Please Note:

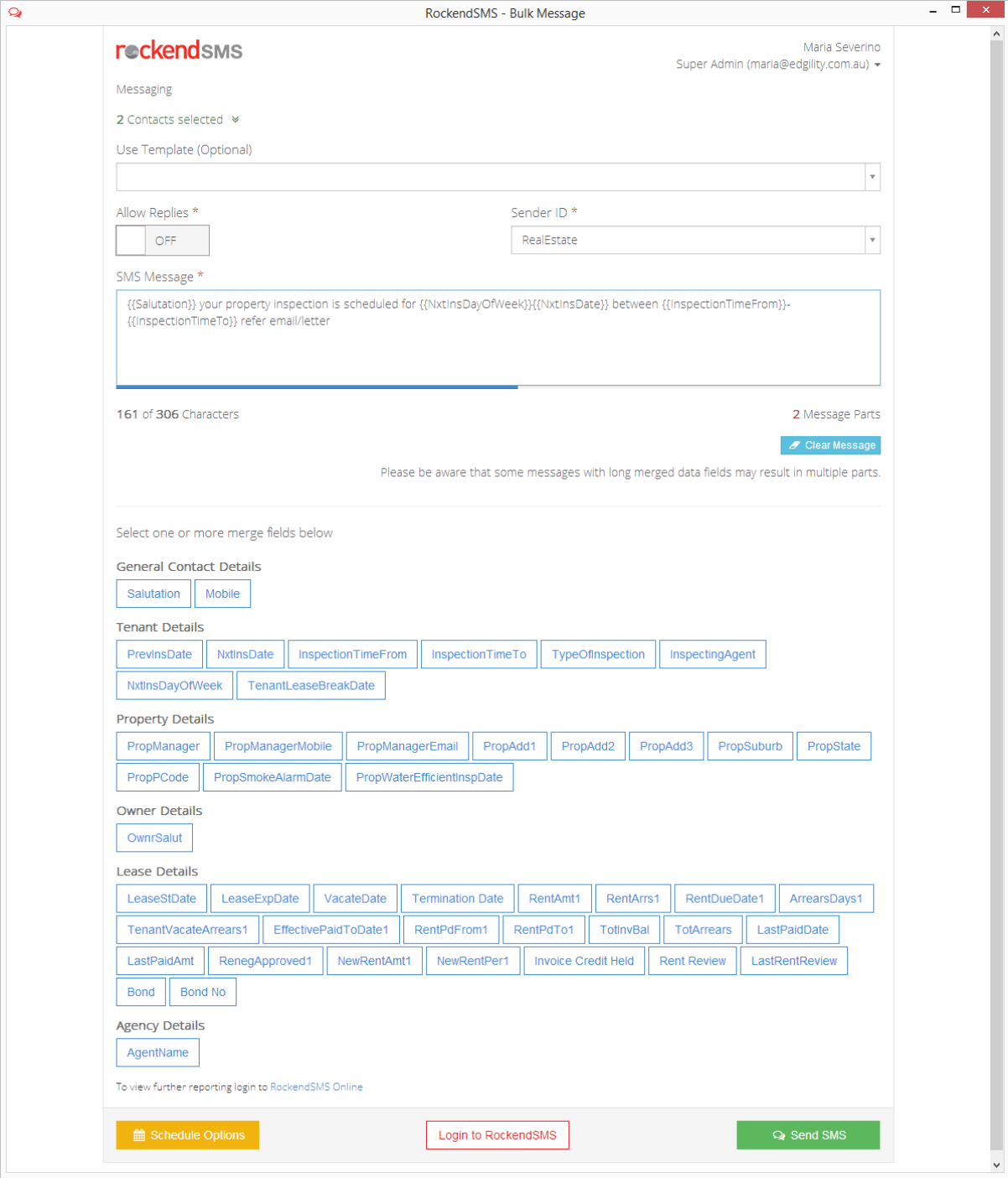
The default selection for SMS messages will be set to SMS and the output cannot be changed.

3. Select the Preview button to review the records that will be included in the merge.
4. Complete the merge process by selecting:

Preview > Proceed Button for SMS Messages

This will load the **Rockend SMS Bulk Message** Screen.

From here you may select the template you wish to use from **Use Templates** dropdown and proceed to **Schedule Options** or **Send SMS**.



RockendSMS - Bulk Message

rockendSMS

Messaging

2 Contacts selected

Use Template (Optional)

Allow Replies * OFF

Sender ID * RealEstate

SMS Message *

{{Salutation}} your property inspection is scheduled for {{NxtInsDayOfWeek}} {{NxtInsDate}} between {{InspectionTimeFrom}}-{{InspectionTimeTo}} refer email/letter

161 of 306 Characters

2 Message Parts

Clear Message

Please be aware that some messages with long merged data fields may result in multiple parts.

Select one or more merge fields below

General Contact Details

Salutation Mobile

Tenant Details

PrevinsDate NxtInsDate InspectionTimeFrom InspectionTimeTo TypeOfInspection InspectingAgent

NxtInsDayOfWeek TenantLeaseBreakDate

Property Details

PropManager PropManagerMobile PropManagerEmail PropAdd1 PropAdd2 PropAdd3 PropSuburb PropState

PropPCode PropSmokeAlarmDate PropWaterEfficientInspDate

Owner Details

OwnrSalut

Lease Details

LeaseStartDate LeaseExpDate VacateDate Termination Date RentAmt1 RentArars1 RentDueDate1 ArrearsDays1

TenantVacateArrears1 EffectivePaidToDate1 RentPdFrom1 RentPdTo1 TotInvBal TotArrears LastPaidDate

LastPaidAmt RenegApproved1 NewRentAmt1 NewRentPer1 Invoice Credit Held Rent Review LastRentReview

Bond Bond No

Agency Details

AgentName

To view further reporting login to RockendSMS Online

Schedule Options Login to RockendSMS Send SMS

Rockend SMS Bulk Message Screen within Rest Professional

- When you are ready you may proceed to the final step of **Inspection Follow Up**. You will be able to return to the **Merge & Send** screen after you select the **Finalise** tab and before you close **Inspection Follow Up**.

7.3 TENANT INSPECTION TAB

Version 12.5 of Rest introduced a new inspections workflow and also some changes to Tenant Details. The new Inspections tab in Tenant Details will display some of the inspection information previously stored on the Renegotiation/Inspect tab.

Tenant Details

Alpha index: SPORT **LOCKED - Read Only** Active

Lease name: Sam Porter

General | Rental | Bank | **Inspections** | Renegotiation | Notes/Mail/Reminder | Invoices | Commercial

Current Inspection Details

Frequency: M6

Exclude from Inspections: ☐

Next Inspection Date: 12/10/15 Monday

Inspection Type: Routine

Inspection Time From: 10:00 PM To: 12:00 PM

Preferred Communication: SMS

Comments: Call before arriving so that the tenant can lock away the dog.

Status: Complete

Inspection History

Date	Type	Status	Inspecting Agent
09/04/15	Routine	Scheduled	

Cancel - ESC
Action - F1
Clear - F2
Delete - F3
Add Mode - F4
Status - F6
Search - F7
Last Edits - F9
OK - F12

Here you can set your Preferred Communication method. When upgrading to Version 12.5 the default will be Letter.

8 ROCKENDSMS TEMPLATES

The following default Rest SMS templates will be available to use when you send a message from Rockend SMS Online through Rest Professional:

- Arrears Water SMSMerge
- ArrearsSMSMerge
- Inspection FollowUp_Owner SMS
- Inspection FollowUp_Tenant SMS
- Inspection Planner_Owner Invitation SMS
- Inspection Planner_Tenant Notification SMS

All templates listed above will be available to the Administrator of Rockend SMS accounts to manage.

The above templates are saved in your Rockend SMS Online Portal as *Global Templates*, this means that they can be used by other users on the account via Rockend SMS sending through Rest Professional and the Rockend SMS Online Portal however only the Administrator has permission to amend and manage *Global Templates*.

Please Note:

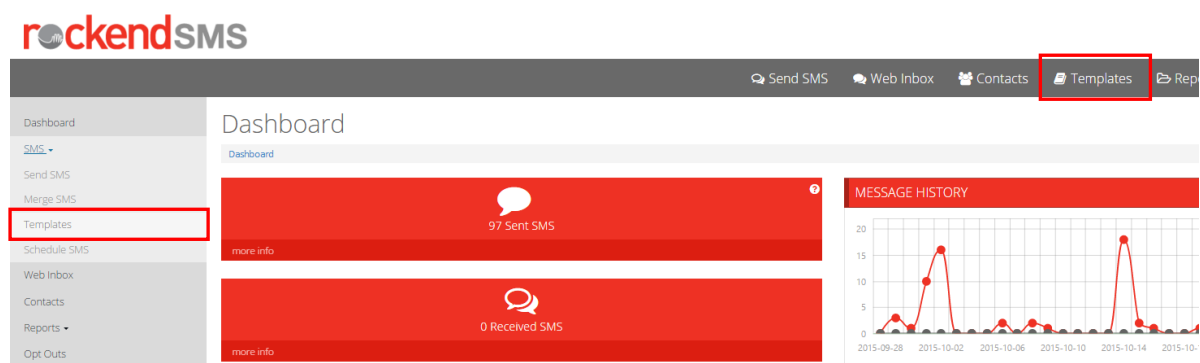
Only **Administrators** of the Rockend SMS account have the permissions to edit, create and save templates for Rockend SMS Online through Rest Professional.

8.1 AMENDING CURRENT ROCKENDSMS TEMPLATES

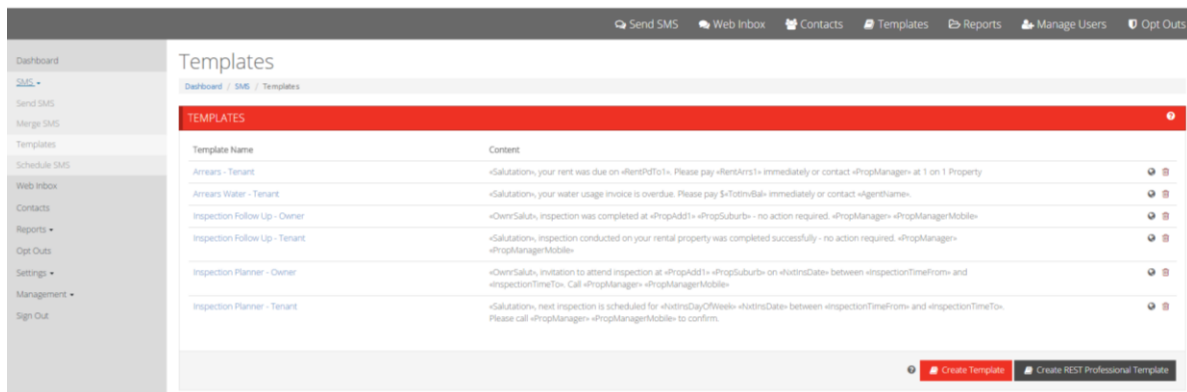
To amend saved templates used for sending SMS in Rest Professional, the Administrator of your Rockend SMS account can do so by logging into the Rockend SMS Online Portal via www.rockendsms.com.au and navigating to;

SMS > Templates

Or alternatively select **Templates** from the Quick Links bar



From the list of Templates available click on the template you would like to amend. Once changes have been made click the **Save** button.



Please Note:

The *Globe* icon indicates the template has been saved as a **Global Template**.

To delete a template simply click on the *trash* icon.

8.2 CREATING ROCKENDSMS TEMPLATES

As an Administrator of your Rockend SMS account you are **not** limited to the amount of *Templates* you can create for sending through Rest Professional.

You can create global templates for Single and Bulk SMS. When creating templates for Bulk SMS, Rest Professional merge fields are available to compose your SMS message.

Please Note:

Templates containing Rest Professional merge fields will not appear in the templates dropdown of the single SMS screen in Rest Professional.

Ensure templates saved for single SMS do not contain merge fields.

Rest Professional merge fields will not be available for use when sending from outside of Rest Professional.

There are two options for creating new templates;

Please Note:

This function is only available to Administrators of Rockend SMS accounts.

Option 1 – Saving a Rockend SMS Enhanced Integration Bulk Template via Print Letters / Export Data:

1. Launch Rockend SMS Bulk Message Screen via Print Letters / Export Data and start composing a new message.
2. Select the option *Save as Template*

SMS Message *

«OwnrSalut», inspection was completed at «PropAdd1» «PropSuburb» - no action required.
«PropManager» «PropManagerMobile»

123 of 160 Characters

1 Message Parts

 Save as Template

 Clear Message

3. Assign a Template Name and Save

Save Template

Name *

Owner Inspection Completed

Sender ID *

RealEstate

SMS Message *

«OwnrSalut», inspection was completed at «PropAdd1» «PropSuburb» - no action required. «PropManager» «PropManagerMobile»

Manage Templates

Close

 Save

Option 2 – Saving Rockend SMS Enhanced Integration Templates via Rockend SMS Online Portal:

1. Log into **Rockend SMS Online Portal** either by clicking on **Login to Rockend SMS** from the **Rockend SMS Single or Bulk Message** screen in Rest Professional or via www.rockendsms.com.au
2. Expand the **SMS** menu on the left and select **Templates**
3. At the bottom right of the screen, select the **Create Rest Professional Template** button

Dashboard
SMS
Send SMS
Merge SMS
Templates
Schedule SMS
Web Inbox
Contacts
Reports
Opt Outs
Settings

Templates

Dashboard / SMS / Templates

TEMPLATES

Template Name	Content
General Inspection Notice	{{Salutation}} your property inspection is scheduled for {{NxtInsDayOfWeek}} {{NxtInsDate}} between {{InspectionTimeFrom}}-{{InspectionTimeTo}} refer email/letter

Create Template

Create REST Professional Template

- Assign a template name and compose your message into the *SMS Message* text area.

Please Note:

Rest Professional merge fields are available from this screen to compose your templates.

- Before saving be sure to check the **Global Template** checkbox to ensure all Rest Professionals users can send SMS using this template.

Agency Details

AgentName
☒ Global Template

Go Back
Save

- Click **Save**