

Bulk Emails Losing Formatting in REST Professional

Overview

When doing a bulk email through Other > Print letters/export data, if you have an SMTP set up, REST will send the bulk emails through this mail server instead of using Microsoft outlook.

You may find that the emailed letter has lost some or all of its formatting spacing and any logos.

27 August 2014, We are always looking for ways to use modern technology to improve the service we provide to our valued clients. We have recently introduced a new innovation to provide you with secure 24 hours, 7 days a week access to view your property details including property statements online. This online service also enables you to email your property manager directly. Kind regards Rockend Realty.

NOTE: The template has lost its formatting, spacing and paragraphs

This document will cover the two options to overcome this issue:

- Send the emails through Microsoft Outlook instead of the SMTP server
- Finish and Merge the Document in Word

Send through Microsoft outlook instead of the SMTP server

- 1. Get all users out of REST
- 2. Go to Other > Utilities > System options > SMTP
- 3. Un-tick 'use SMTP email for statements & creditor remittance

💱 System Options	X		
Transactions Statements 📼 Statement/Report Sales Other SMTP System 📼 Other Payments	Miscellaneous Descriptions Reminders		
Test current email settings			
SMTP (Outgoing email) PC	0P3 (SMTP authentication - if required)		
SMTP Server bigpond.net.au PC	DP3 Server		
Sent Items Email	User Name		
Use SMTP email for statements and creditor remittances	Password		
You should arrange for your technician to provide this information. Rockend can not assist as every site will be different. If SMTP Server details are provided, then direct SMTP will be used to send emailed owner statements and creditor remittances etc. If the SMTP Server details are not entered here, then Microsoft Outlook will be used instead. SMTP Server: Your SMTP server for outgoing email. eg: mail.mycompany.com.au. Sent Items Email Address: The email address that is used to store sent emails for future reference. If present, it will always be placed in the BCC (blind copy) field of the sent email. POP3 Server, User Name, and Password: Used for authentication if the SMTP server requires it. You may not need to enter anything.			
NOTE: The email address in the General tab of Compar	ny Details is used as the return email address.		
	OK • F12		

- 4. Do the merge through print letters/export data. REST will now default to using microsoft outlook and the formatting and spacing will be as it is in your template.
- 5. After you have successfully sent the emails you can go back into system options and re-tick 'Use 5.SMTP email for statements and creditor remittances'

NOTE: The email will leave REST through Microsoft outlook and go from your direct email address. They can be seen in the sent items.

Finish and Merge the document in Word

NOTE: If you choose to use the following method using finish and merge the template it will not save to document management as it would normally therefore this option may not be suitable.

- Select merge criteria as normal through Other > Print letters/export data and choose your selection criteria and click Start-F12
- 2. Once the template generates, click on Finish and Merge > Send Email Messages

File Home	Insert Page Layout Refer	ences Mailings Re	eview View		· · · · ·	
Envelopes Labels	Start Mail Select Edit Merge * Recipients * Recipient List	Highlight Address Gr Merge Fields Block	reeting Insert Merge Line Field *	Pules ▼ Match Fields Update Labels	Preview Results	Nors Herge Y
Create	Start Mail Merge	Wr	rite & Insert Fields		Preview Results	Edit Individual Documents
			Send E-mail Messages			

Complete the Merge to email screen with subject line and select the relevant details and click OK.
 3.Your emails will begin to send now.

Merge to E-ma	il 🔋 🕱			
Message options				
T <u>o</u> :	Email			
Subject line:	CLEANING OF RENTAL PROPERTY			
<u>M</u> ail format:	HTML			
Send records				
<u>A</u> II				
Current record				
© <u>F</u> rom:	<u>T</u> o:			
	OK Cancel			

4. Close the WORD document now & say "NO" to message 'send email/sms messages' as the above 4.process already sends it.

02/02/2016 10:52 am AEDT