How to Edit a Job in fileSMART PrintMail

1. Click on the 'Jobs' Button on the left hand side

2. Choose the Job Template that you would like to change, and click 'Edit' up the top left hand side of your screen.

3. Edit the Description field and the contact type for this job template.

4. You can choose a sort order for your print bundles, or choose to leave this blank.

5. If you use more than one Trust program, select the one that contains the contacts for this job

6. Enter a Collation Period – '1' is fine for this example. The Start Date for the collation will use this value for the date of the last collation whichever is longer. A document will be collated:

    i. If it is one of the document types in the job list

    ii. If the date used when the document was archived (not the date it was archived) is within the range of the Start Date and End Date; and

    iii. If it has not been collated previously

7. Select the Current Month, or Previous Month radio button. This is important if you append the month to the email subject, or insert the ##Month## merge field in the body of the email.

8. To remove a document from the job

    i. Highlight the document in the list of Selected Document Types – e.g. 'Owner Statements',

    ii. Click the < button to remove from the list

9. To add a document to the job:

    i. Choose the correct folder from the Available Groups drop-down list

    ii. Click on one of the document types you want in this Collation job from the Available Document Types list e.g. 'Tenancy Agreement'

      iii.   Click on the > button.

10. If a document is ticked as a Primary Document then the other documents won't be collated for that particular contact unless there is a Primary Document for them – e.g. in an Owner Statement Run you want to send an Owner Invoice when there is an Owner Statement for the owner. In this 'Weekly Owner Mailout' make sure none of the 'Primary Document' boxes are ticked. Click next when you've added all the documents you want

11. Set up your email message by going to the 'Email Template' tab at the centre of the screen:

      i.   Type in a Subject and a message for the emails

      ii.   Tick 'Append month to email subject' if you would like the name of the month included automatically to the email subject line

      iii.   Amend the body of the email message if required. Click on the 'Preview' button to see what your clients will receive

      iv.   If you need to make any changes, do so and preview again

12. When you have finished editing click the 'Save' button up the top left hand side of the screen and create your collation as per normal.

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