rockend

How to Setup to Email Tenant Statement Invoices in Rest Professional

This document will cover the following:

- Overview
- System Options Steps
- Tenant Details Setup
- Emailing Tenant Statement/Invoicing

Overview

You can set up your system to bulk email your tenant statement/invoices in Rest.

There are three steps involved in setting this up and sending your invoices by email:-

- Setup your System Options to Email Tenant Statement
- Setup to bulk email against your Tenant Card
- Tick to send email statements at the time of printing the statement/invoices.

System Options Steps

You must ensure you have your System Option ticked to 'E-mail Tenant Statements' first.

- 1. Go to Other > Utilities > System Options
- 2. Click on the Statements tab
- 3. Under Tenant Statement/Invoice, tick "Email tenant statements"

Optional: if you would like to print a copy of the tenant invoice that has been sent via email tick the "print emailed invoice/ statement". If you only want the invoice printed if not sent via email then have this option un-ticked.

ransactions Statements Statement/Report	t Miscellaneous	Descriptions F	leminders	.]
Statements				
Print owner payment details on statements Print vendor contact numbers (Sales only) Print property address Print property manager name	Show Invoices GS Print effective pair Show future book	6T Excl on style 6,7 d to on style 6/7 ings on statement ce for future bookir	1,11 ngs	
Print creditor name	Default sort order	Owner	~	
Include period paid column Include ten	ant invoices with rents	No tenants	~	
Print "due to" instead of "paid to"	Print inhand column	Yes	\sim	
Show G51 inclusive in commercial statement Print future increases on 4 and 8	Print GST summary	Commercial	\sim	
Tenant Statement/Invoice				
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Email owner statements				🗙
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Tenant Details Setup

You will need to set each tenant up on their individual tenant card to have their Statement emailed.

- 1. Go to Files> Tenant
- 2. Click on the Invoices Tab



- 3. Under Statement Control, tick the "send bulk invoice/ statement by Email"
- 4. Click OK-F12

This will then ensure that the invoice will be sent to the accounts contact (if applicable) for that tenancy when you do your bulk Statement Invoices each month.

NOTE: You can check who the Accounts Contact is on the General Tab of the Tenant Card. You can only have one Accounts contact selected for each tenancy. When the Electronic Consent System Option is enabled:

- There is no change to existing functionality if the tenant, selected as the Accounts Contact, has consented to the electronic service of notices.
- If the Tenant selected as Accounts Contact has not consented to the electronic service of notices, a prompt will display and the tenant will not receive the email invoice/statement. For further information please click on Consent for the Electronic Services of Notices and Document.

S Tenant Details	
Alpha index DAMONM Active	
General Rental Bank Inspections Renegotiation Notes/Mail/Reminder Invoices Commercial	1
Property HUDSON10/2 Suite 2 / 10 Hudson Street ST LEONARDS NSW 2065 Go to property. Alee Baldwin	X Cancel - ESC
Go to owner Home 08 8236 4536 Work 08 8277 7688 Contact Name Matt Damon V Add contact	Action - F1
Salutation Mr Damon I Total contacts: 1 Date of Birth / / /	Clear - F2
Home 3965 8788 Work 3945 8758 Fax 3945 9566 Mobile 0412 875 406	Delete - F3
Email janele lawence@rockend.com.au	Add Mode - F4
Lease Short name Matt Damon Bond required \$4,200.00	Search · F7
Original lease date [01/05/02] Vacating _/_/ Bond no [BD ACCOUNT] Lease start date [01/05/15] Termination _/_/_ Bond collected [\$4,200.00] Lease end date [01/05/70] Lease break / Bond held \$0,00]	Last Edits - F9
	OK · F12

Emailing Tenant Statement/Invoices

- 1. Go to Reports > Tenant > Statement/Invoice Printing
- 2. Select your criteria i.e. / select your tenants or select a Class
- 3. Tick 'Send email statement'
- 4. Click PRINT-F12

It is important when you are emailing your monthly tenant Statement Invoices you tick the 'Send E-mail Statements' checkbox and always click Print

If you have File Smart and want to email the statement/invoices thru File Smart do not select 'Sent E-mail Statements' checkbox and print to the File Smart PrintMail printer and sent thru File Smart PrintMail.

Once again, when the Electronic Consent System Option is enabled:

• There is no change to existing functionality if the tenant, selected as the Accounts

Contact, has consented to the electronic service of notices.

 If the Tenant selected as Accounts Contact has not consented to the electronic service of notices, a prompt will display and the tenant will not receive the email invoice/statement. For further information please click on Consent for the Electronic Services of Notices and Document.

NOTE: If you want to preview your statements prior to sending you can do so, however it is important that you do not email from the preview screen as this will not email correctly.

Selection		Advanced		
Month to Print	Current ~	Manager	All	
) All		Report Order	Tenant ~	
Range	Start at Alpha Index	Class	All	
Select		Print Zero Balance	Print Zero Balance Statements Print global comment Print Invoices Only Due Date for Rents/	
A	A Printer Select	6) 🕞 📂 🗙	

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