How to Create a New Job in fileSMART PrintMail

1. Click on the Jobs button.
2. Click on the New Button up the top centre of the screen.
3. Type the name of the job template into the Description field e.g. 'Inspection reports' (this description will only be seen by you)
4. Select your contact type eg. Owners, Tenants or Creditors
5. You can choose the sort order that will be used for the printed bundles or choose to leave it blank.
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:

    - If it is one of the document types in the job list;
    - 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
    - If it has not been collated previously

10. Select either the Current Month or Previous Month radio button. This is important if you intend to append the month to the email subject, or insert the ##Month## merge field in the body of the email.
11. Select the trust that holds the contacts you want to send to.

12. To add a document to the job:

- choose ‘Property Management’ from the Available Groups drop-down list
- click on one of the document types you want in this Collation job from the Available Document Types list e.g. ‘Tenancy Agreement’
- click on > arrow to move them across to the list of included document types.

- add more documents to your job design as required – e.g. Management Agreement, Inspection Report Ingoing, Inspection Reports Routine, Body Corp Docs

Note: 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.

13. Click on the Email Template tab (centre of the screen, near General Data)

- Type in the subject and the body of the email
- Tick 'Append month to email subject' if you would like the name of the month included automatically to the email subject line
- Click on the 'Preview' button to see what your clients will receive
- To insert merge fields, images, hyperlinks or symbols, click of the 'Insert' tab.
- If you need to make any changes, do so and preview again
- When you are happy with the email message click on the 'Save' button up the top left of your screen.

14. Once you have finished creating the new Job, create your collation as per normal in order to send the documents to your contacts.

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