

How to Email Owner Statements in Rest Professional

You can setup Rest to email your owner statements rather than printing and mailing them. This can not only save your agency money on postage, but also save time printing the statements and putting them in envelopes.

This document will assist you to:

- Setup the Owner details to send statements by email
- Setup System Options to print emailed statements
- Send the Owner Statements by email

Set up the Owner details to send statements by email

1. Go to Files > Owner Details, enter the alpha index of your owner and press ENTER
2. Within the General tab, ensure there is a valid email address in Email field
3. Under 'Send Statement by', select Email
4. Click OK-F12

The screenshot shows the 'Owner Details' window with the following fields and values:

- Alpha index: ALYWALLEED
- Ownership: Waleed Aly & Susan Carland
- Primary Owner: Title: Mr, First Name: Waleed, Last Name: Aly, Name: Mr Waleed Aly, Salutation: Waleed
- Contact Details: Home: [empty], Work: [empty], Fax: [empty], Mobile: 0412345678, Email: waleed@theprojecttv.com.au
- Address: 90 Bourke St, Melbourne, VIC, 3000
- Communication: Preferred Communication Method: Email, Send Statement by: Email, Quantity: 1
- Send Income & Expenditure Report by: Email
- Primary Contact: Primary Contact, Lease Contact, Accounts Contact, Repairs Contact
- Split payments: % amount retained: 100, Balance to owner: [empty]

Set up additional Owner details to send statements by email

1. Within the General tab, click on 'View all Contacts'
2. Double click on additional owner, ensure there is a valid email address in Email field
3. Under 'Send Statement by', select Email
4. Click OK-F12

Alpha index: Active

Ownership:

General | Payment | Notes | Enquiry | Properties | O/S Disbs | Budget | Tax & Charges

Primary Owner

Title:

First Name: Last Name:

Name:

Salutation:

Contact Details

Home: Work:

Fax: Mobile:

Email:

Address:

Communication

Preferred Communication Method:

Send Statement by: Quantity:

Send Income & Expenditure Report by:

Primary Contact Lease Contact Accounts Contact Repairs Contact

Comments:

Split payments

% amount retained: Balance to owner:

Owner	Salutation	Contact Type	Preferred Communication Method	Relationship
✓ Waleed		Primary	waleed@theprojecttv.com.au	Primary Owner
✓ Susan			susan@carland.com.au	Wife

Buttons: Email owners, Add New Contact, View Contact, Print List, Cancel

For **File Smart** users:

Do not set send options for additional owner contacts.

If you do, Rest will produce additional statements and send a copy of all the statements to all the recipients -

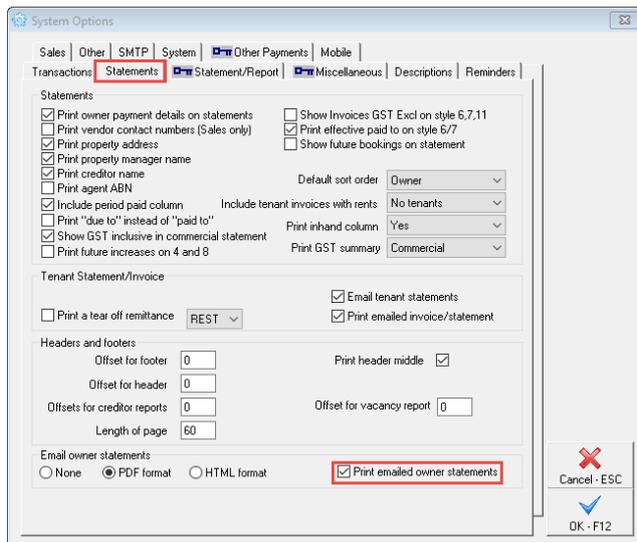
- Owners with email addresses in Rest automatically get set to receive emailed statements
- Owners with no email addresses in Rest get printed statements
- Owners who want both emailed & printed statements Edit > Email & Print
- Non-owners are automatically set to Do Not Issue – so if the accountant need to get statements, go into PrintMail contacts > Edit > deselect Do Not Use
- File Smart users leave as blank in Rest - see Knowledgebase article [How File Smart PrintMail users should set up the owner cards in Rest Professional](#)

Set up System Options to print Emailed Statements

You have an option in System Options to print the emailed owner statements if you require a hard copy as well as it being emailed.

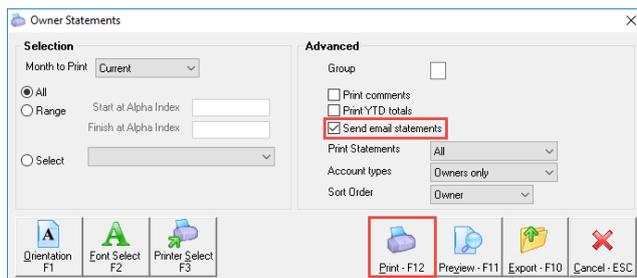
To set this up, you need to:

1. Log all users out of Rest
2. Go to Other > Utilities > System Options > Statements Tab, tick 'Print emailed owner statements' if you would like the statement printed as well as being emailed. Note that if this box is un-ticked, it will not print any Owner Statements that are emailed.
3. Click OK-F12



Send the Owner Statements by Email

1. To email statements, go to Reports > Owner > Statement Printing
2. Tick Send email statements
3. Click Print–F12



For **File Smart** users: Do not select 'Send email statements' if you want to send statements via File Smart PrintMail. Print to File Smart PrintMail printer instead.

Note: If selecting to Print YTD totals this will include the year to Date totals at the bottom of the statement. Please note the YTD totals do not include journals i.e. fees and any journal debits or credits.

! If you want to preview the statements prior to printing, you can press Preview and view them, however, you must not email from this preview screen. To email and print your statements. Click on the blue arrow back key to go back to the original print screen, or exit out of the preview screen and go back into the main screen as per step 1.

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Rockend Real Estate
Licensee: Bedrock United
1 Chandos Street
ST LEONARDS NSW 2065
Tel:(02) 9966 0900 Fax:(02) 9966 1111

Hugh Jackman
1A Wylde Street
POTTS POINT NSW 2011

TAX INVOICE

Manager: Clark Kent STATEMENT FOR THE PERIOD ENDING: 16/12/13 Reference: JACKMAN



If you press the email icon from the preview screen, it will produce a PDF of all of the Owner Statements as one document and they will not be emailed to the individual owners.

28/07/2020 10:21 am AEST