

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

| 🐣 Owner Details | - • × |
|---|-----------------|
| Alpha index ALYWALEED Active |] |
| Ownership 🛛 Waleed Aly & Susan Carland | |
| General Payment Notes Enquiry Properties 0/S Disbs Budget Tax & Charges | l. |
| Add new Contact View all Contacts | |
| Primary Owner | |
| Title Mr 🗸 | |
| First Name Waleed Last Name Aly | |
| Name Mr Waleed Aly | 🗙 |
| Salutation Waleed | Cancel - ESC |
| Contact Details | |
| Home Work | Action - F1 |
| Fax Mobile 0412345678 | |
| Email waleed@theprojecttv.com.au | Clear - F2 |
| Address 90 Bourke St | |
| Melbourne | Delete - F3 |
| VIC, 3000 | 🔶 |
| Communication | Add Mode - F4 |
| Preferred Communication Method Email ~ | |
| Send Statement by Email V Quantity 1 V | Search - F7 |
| Send Income & Expenditure Report by Email V | |
| Primary Contact Lease Contact Accounts Contact Repairs Contact | Replicate - F8 |
| Comments | Ò |
| Split payments | Last Edits - F9 |
| % amount retained 100. Balance to owner | ✓ |
| 1.441 | 0K · F12 |

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

| 🔔 Owner Details | | 8 Ownership | Contacts | | | | 8 |
|---|-----------------|-------------|------------|-------------------------|---|-------------------------------|------|
| Alpha index ALYWALEED Active | 1 | Owner | Salutation | Contact Type Primary | Preferred Communication Method waleed 8theorojectty.com.au | Relationship Primary Owner | |
| Ownership Waleed Alu & Susan Catland | | ~ | Susan | | susan@carland.com.au | Wife | |
| | | | | | | | _ |
| General Payment Notes Enquiry Properties U/S Disbs Budget Tax & Charges | | | | | | | |
| Primary Owner | | | | | | | |
| Title Mr 🗸 | | | | | | | |
| First Name Waleed Last Name Aly | | Email own | MS | Add New Cor | Nact View Contact F | Print List Car | ncel |
| Name Mr Waleed Aly | × | | | | | | |
| Salutation Waleed | Cancel · ESC | | | | | | |
| Contact Details | | | | | | | |
| Home Work | Action - F1 | | | | | | |
| Fax Mobile 0412345678 | | | | | | | |
| Email waleed@theprojecttv.com.au | Clear · F2 | | | | | | |
| Address 90 Bourke St | 🗽 | | | | | | |
| Melbourne | Delete · F3 | | | | | | |
| VIC, 3000 | 🔶 🗌 | | | | | | |
| Communication | Add Mode - F4 | | | | | | |
| Preferred Communication Method Email | | | | | | | |
| Send Statement by Email V Quantity 1 V | Search - F7 | | | | | | |
| Send Income & Expenditure Report by Email ~ | | | | | | | |
| Primary Contact Lease Contact Accounts Contact Repairs Contact | Replicate - F8 | | | | | | |
| Comments | 6 | | | | | | |
| CoB numeric | Last Edits - F9 | | | | | | |
| 2 amount retained 100 Relance to owner | ✓ | | | | | | |
| | 0K · F12 | | | | | | |

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
- 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

| ransactions Statements Dra Statement/Rep | ort 📔 📼 Miscellaneous 🗍 Descriptions 🗍 Rem | inders |
|--|---|--------|
| Statements | | |
| Print owner payment details on statements Print vendor contact numbers (Sales only) Print property address Print property manager name | Show Invoices GST Excl on style 6,7,11 Print effective paid to on style 6/7 Show future bookings on statement | |
| Print creditor name | Default sort order Owner | ~ |
| Include period paid column Include b | mant invoices with rents No tenants | ~ |
| Print "due to" instead of "paid to" | Print inhand column Yes | ~ |
| Show GST inclusive in commercial statemen Print future increases on 4 and 8 | Print GST summary Commercial | ~ |
| Tenant Statement/Invoice | | |
| | 🗹 Email tenant statements | |
| Print a tear off remittance REST 🗸 | Print emailed invoice/statemer | nt |
| Headers and footers | | |
| Offset for footer 0 | Print header middle 🗹 | |
| Offset for header 0 | | |
| Offsets for creditor reports 0 | Offset for vacancy report | |
| Length of page 60 | | |
| Email owner statements | | |
| | 2 Drint oppoiled suppor statement | |

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

| 💩 Owner Statements | | \times |
|--|---|----------|
| Selection Month to Print Current ~ | Advanced Group | |
| All Ange Start at Alpha Index Finish at Alpha Index O Select | Print YTD totals Print YTD totals Send email statements Print Statements Account types Owners only Soft Order Owner | |
| Qrientation F1 Eont Select F2 Print Select | Bint - F12 Preview - F11 Export - F10 Cancel | · ESC |

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.

U 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.

🔍 🔍 14 4 🕨 14 🗲 👫 📋 🖧 🖉 🏫 🗶 Pogelall

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

U 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