

Sensitive Change Alert Setup and Use in REST Professional

Overview

In Rest Professional you can enable 'sensitive change alerts' so that an email notification is sent to designated users, located in the Rest Professional User Details section.

When you enable the Sensitive Change Notification option, every time an operator carries out the following changes, reporting or exporting in Rest Professional an email will be sent with all relevant changes/reporting that have been made:

- Owner payment detail changes
- Creditor payment detail changes
- Tenant Bond collected amount changes
- Owner Detail report preview/print/export
- Owner & Tenant by Property report preview/print/export
- Export of Information to Excel for Owner/Property/Tenant/Creditor/Diary/Sales
- Restoring data from anywhere in REST

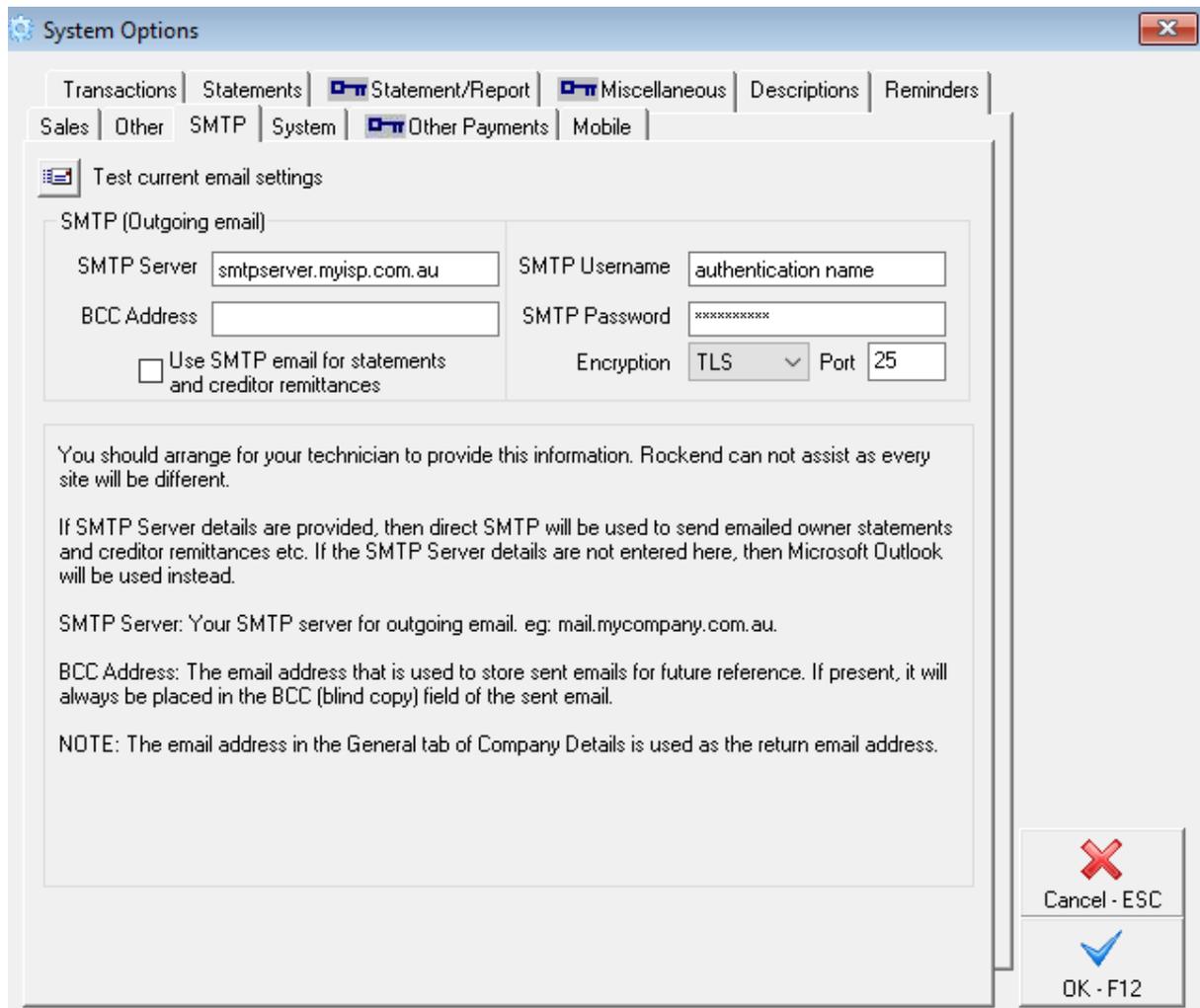
Prerequisites & Configuration

To enable this option you need to configure the SMTP settings in the Rest Professional System Options and ensure you are setup to receive these sensitive change alerts in the User Details.

1. Go to Other > Utilities > System Options > SMTP Tab and enter your SMTP Server details. You may need to contact your IT support provider to supply you with these details or assist with this configuration
2. Once you have entered your SMTP Server details, test that the configuration is successful by clicking on the 'Test current emailing settings' button and click 'Yes' to send the test email when prompted

3. If the test email is successful, click on OK-F12 to save the SMTP settings

Important Note: The tick box to 'Use SMTP email for statements and creditor remittances' is **not** required to enable emails for sensitive alerts. This tick box should only be ticked if you wish to use SMTP instead of Outlook for all bulk email types. For more information see the [How to Setup SMTP in Rest Professional](#)



The screenshot shows the 'System Options' dialog box with the 'SMTP' tab selected. The 'Test current email settings' button is visible. The 'SMTP (Outgoing email)' section contains the following fields and options:

SMTP Server	smtpserver.myisp.com.au	SMTP Username	authentication name
BCC Address		SMTP Password	*****
<input type="checkbox"/> Use SMTP email for statements and creditor remittances		Encryption	TLS
		Port	25

Below the fields, there is a text box with the following content:

You should arrange for your technician to provide this information. Rockend can not assist as every site will be different.

If SMTP Server details are provided, then direct SMTP will be used to send emailed owner statements and creditor remittances etc. If the SMTP Server details are not entered here, then Microsoft Outlook will be used instead.

SMTP Server: Your SMTP server for outgoing email. eg: mail.mycompany.com.au.

BCC Address: The email address that is used to store sent emails for future reference. If present, it will always be placed in the BCC (blind copy) field of the sent email.

NOTE: The email address in the General tab of Company Details is used as the return email address.

At the bottom right of the dialog box, there are two buttons: 'Cancel - ESC' (with a red X icon) and 'OK - F12' (with a blue checkmark icon).

3. Go to Other > Utilities > System Options > Other tab and ensure you tick 'Sensitive alert for report/export'

System Options

Transactions | Statements | **Statement/Report** | **Miscellaneous** | Descriptions | Reminders

Sales | Other | SMTP | System | **Other Payments** | Mobile

Miscellaneous

Do not print properties on consolidated expenditure Cancel web ad upon deposit/rent receipt

Include Unpresented report with Bank Rec report Use effective arrears for tenant export

Include Trial Balance with Bank Rec report Use Water Invoicing

Creditor insurance renewal reminder Use ADL Forms

Use Sub-meter invoicing Show I&E figures GST Exclusive

Display Tax Invoice confirm/edit message Use Realworks Forms

Pay settlement day to purchaser Sensitive alert for report/export

Charge disb fee on quick disbursements Add Invoice Comment to ledger

Print manager name on invoice Exclude diary comments

Calculate arrears to selected day

Warn if duplicate PM disbursement is found in current and historical months

Enforce Electronic Consent status for tenant email

Disbursements

Post all PM disbursements to outstanding Quick disbursements use manual cheque sequence

Inspection fees

Charge fees Account code Inspection Fees

Laser report margins (mm)

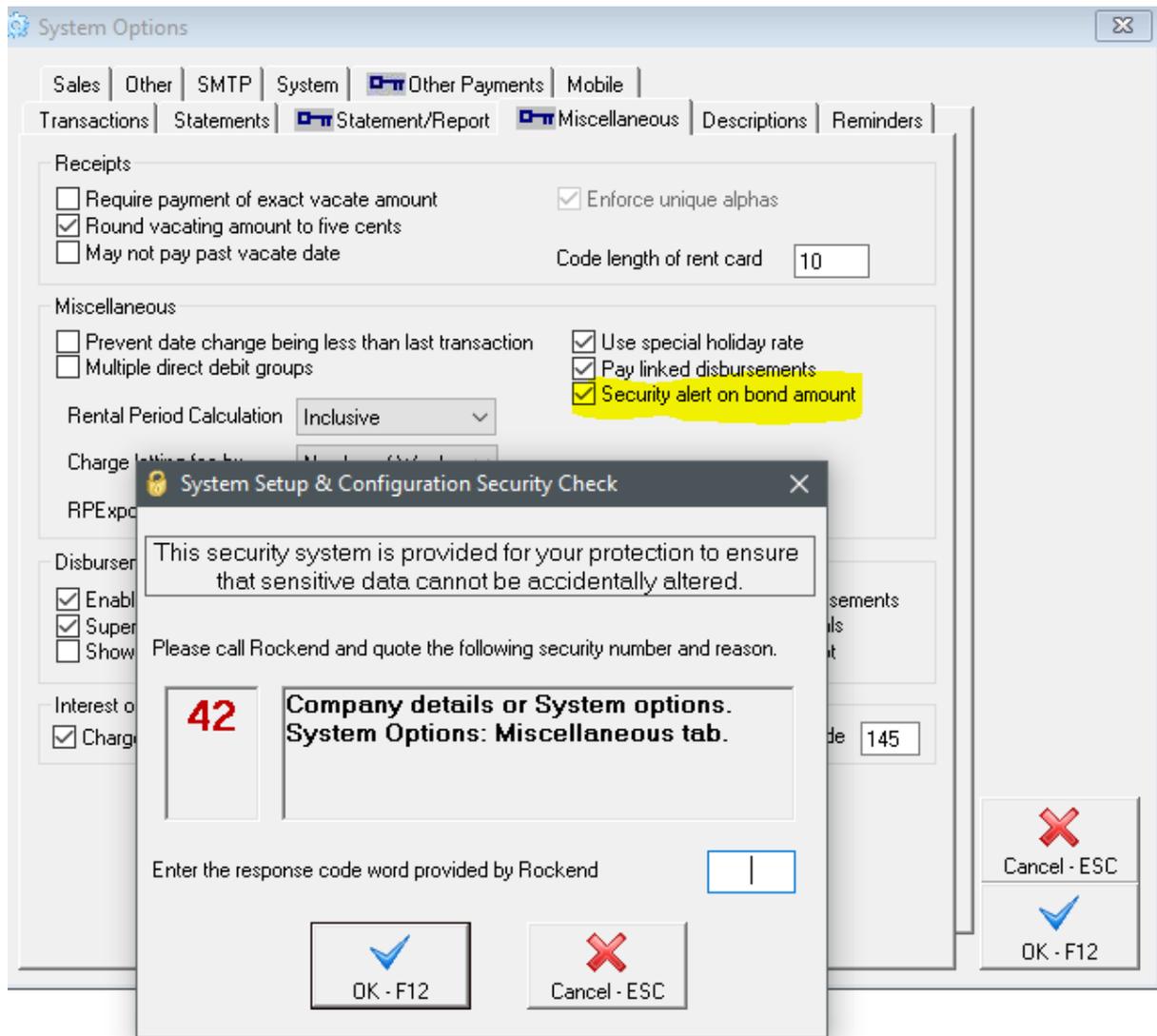
Top Left

Bottom Right

Options for owner/tenant portal reports & emailing statements, remittances, work orders, quote requests

Print header with company details Print company logo

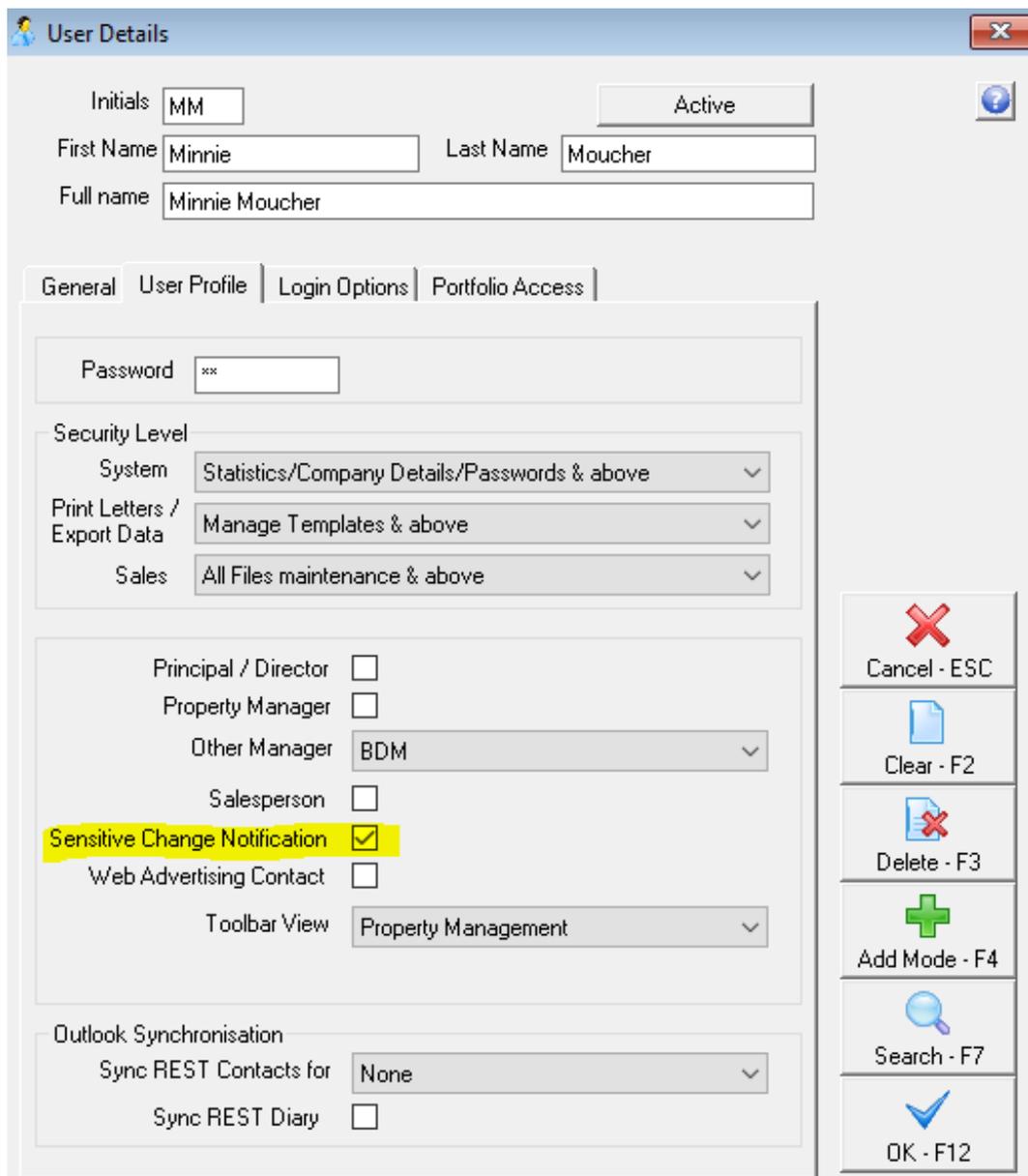
4. If you wish to also be alerted when a bond amount is changed, this will have to be enabled on the Miscellaneous Tab by ticking the 'Security Alert on bond amount' check box. At this point, you will require Rockend Support to supply with you a response code. Enter the response code given by Rockend.



User Setup

To setup a user to receive sensitive change email alerts follow the instructions below:

1. Go to Files > User
2. Click on Search – F7 and find the user you wish to setup sensitive alter for
3. On the General tab ensure the users email address is valid
4. Click on User Profile Tab
5. Tick 'Sensitive Change Notification' and click OK-F12
6. Also ensure that the user has a valid email address under the 'General' tab.



User Details

Initials:

First Name: Last Name:

Full name:

General | **User Profile** | Login Options | Portfolio Access

Password:

Security Level

System:

Print Letters / Export Data:

Sales:

Principal / Director:

Property Manager:

Other Manager:

Salesperson:

Sensitive Change Notification:

Web Advertising Contact:

Toolbar View:

Outlook Synchronisation

Sync REST Contacts for:

Sync REST Diary:

Cancel - ESC

Clear - F2

Delete - F3

Add Mode - F4

Search - F7

OK - F12

You may also wish to configure the [Setup and use of Business Alerts in REST Professional](#) article to be of benefit to you.

Examples of sensitive change alert email notifications

REST Professional Notification: Sensitive Change Made



support@rockend.com.au

To 

A sensitive change has been made in REST Professional

User: Clark Kent (Clarke - CK)

Computer: ROCK-LP208

REST Date: 12/03/20 Computer date: 12/03/20, 18:32:37

Changes recorded in File Changes report:

MISC:

Old:

**** Owner Detail Report Produced ****

New:

Reason given by user: **** Owner Detail Report Produced ****

REST Professional Notification: Sensitive Change Made



support@rockend.com.au

To 

A sensitive change has been made in REST Professional

User: Clark Kent (Clarke - CK)

Computer: ROCK-LP208

REST Date: 12/03/20 Computer date: 12/03/20, 18:34:01

Changes recorded in File Changes report:

Creditr: BRONNIE

Old:

Payment details for:

Auto deposit (EFT) consolidated

Bronnie's Cleaning Services

836483838

062-765

CBA Marrickville

New:

Bronnie's Cleaning Services

Auto deposit (EFT) consolidated

Bronnie's Cleaning Services

123456789

062-111

CBA Marrickville

Reason given by user: New Bank Account

12/03/2020 7:02 pm AEDT