

How to Change Owner Statement and Creditor Email Text

Overview

When emailing owner statements (in bulk) and creditor correspondence (remittances, quote and work order requests) the emails are sent automatically through REST. The outgoing email text can be customised so that a message will appear in the body of the email to suit your needs. Otherwise a default message will appear.

NOTE: This configuration is for emailing owner statements using REST and will not change the text/email if sent using fileSMART.

This document will cover:

- How to Change Owner Statement Email Text
- How to Change Creditor Remittances, Quote and Work Order Email Text

How to Change Owner Statement Email Text

The owner statement email text is configured in the REST company details. Once completed, this outgoing email will be sent whenever sending out Owner Statements via email and will remain the same until the next time it is changed.

- 1. Go to Other > Utilities > Company Details
- 2. Select the Defaults tab
- 3. Under Edit text files choose Owner statement email text

Company Details	
General Charges/Taxes Internal Accounts Defaults Advertising Third Party	
Print header on statements & reports Owner Remittance Printing styles Owner Quote and work order Owner statement default 7 Tenant Quote and work order Creditor cheque style 0 Print logo Vacancy Counter rpt Creditor cheque style 0 Company Logo to be printed on report headers Browse	
Owner, Property, Tenant Defaults Management Fee 8.00 Charge Bank Charges Image Management Fee 8.00 Sundry/Postage 5.00 Disbursement Fee 0.00 Income & Expenditure Fee 30.00 Inspection Fee(Excl) 50.00 Owner tenancy agreement fee default 30.00 Inspection Frequency M6 Tenant tenancy agreement fee default 0.00 Holiday Management Fee 10.00 Tenant Invoice Commission % 0.00 Current Accounting Month Year November 2014 Tenant Tenant	
Miscellaneous defaults Portfolio checker Edit Diary options Edit Align Cheque	
SMS provider email Attached cheque layout SMS provider email Attached cheque layout SMS default reply si Section 42a Global statement comment Next Tax Invoice N Next Tax Invoice N Owner statement email text End Of Month Wize Owner income & expenditure email text Internal Payment M Creditor quote email text Creditor remittance email text Tenant invoice/statement email text Electronic remittance email text SMS email template text Confidentiality Vacancy counter report comment	Cancel - ESC
Global remittance advice comment Global work order comment Global quote request comment Sales global statement comment	

- 4. Select Edit This will open a Notepad document
- 5. If this is the first time the Owner statement email text has been used, the following message will appear.

Notepad	
	Cannot find the C:\REST\DATABASE\DATA\EmailOwnerstat.txt file. Do you want to create a new file?
	Yes No Cancel

6. Select Yes

7. Type in the message that you would like to include on the outgoing email

EmailOwnerstat - Notesad	
File Edit Format View Help	
Please find attached a copy of your most recent owner statement.	A
Should you have any queries concerning your statement, please feel free to contact your Property Manager directly.	
Thank you and Kind Regards, Bockend L	
nun heren eine seine	
	*
	1-4 6-10
	Ln 6, Cory

8. Go to File > Save



- 9. Go to File > Exit
- 10. Click OK-F12 on the company details screen

Example of owner email



NOTE: At any time the outgoing email text can be edited by following the steps above and saving the document.

How to Change Creditor Remittances, Quote and Work Order Email Text

As with owner statements, outgoing emails for creditors can also be configured separately for creditor remittances, quote requests and work orders.

- 1. Go to Other > Utilities > Company Details
- 2. Select the Defaults tab
- 3. Under Edit text files choose either:
 - Creditor quote email text or
 - Creditor work order email text or
 - Creditor remittance email text

Company Details						
General Charges/T	General Charges/Taxes 🔤 Internal Accounts Defaults Advertising Third Party					
Print header on state Owner 🔽 Tenant 📝 Q Print logo 🦳 V	Print header on statements & reports Printing styles Owner Image: Comparison of the statement of the statement default Tenant Quote and work order Image: Comparison of the statement default Print logo Vacancy Counter rpt Image: Creditor cheque style					
	Company Logo to be	e printed on i	eport headers			
					Browse	
– Owner, Property, Te Charg	nant Defaults je Bank Charges Sundry/Postage	⊽ 5.00	Manager Disburse	ment Fee ment Fee	8.00 0.00	
Income	& Expenditure Fee	30.00	Inspection	Fee(Excl)	50.00	
Owner tenancy agre	eement fee default	30.00	Inspection F	requency	M6	
Tenant tenancy agre	ement fee default	0.00	Holiday Manage	ment Fee	10.00	
Tenant Invo	ice Commission %	0.00	Current Accounti	ng Month	Year	
			November	•	2014 👻	
- Miscellaneous defau	lts					
Portfolio checker	Edit	Diary option	ns Edit	Align C	heque	
Edit text files	Attached cheque layout			Ec	dit	
SMS provider email SMS default reply st	ider email Unattached cheque layout ult reply st Section 42a Global statement comment					
Next Lax Invoice N	Next Tax Invoice N Owner statement email text					<
End Uf Month Wiza Internal Payment M	End Or Month Wize <u>Creditor quote email text</u> Internal Payment M Creditor work order email text Creditor remittance email text Tenant invoice/statement email text Electronic remittance email text SMS email template text Confidentiality					Cancel - ESC
	Vacancy counter r Global remittance Global work order Global quote reque Sales global staten	eport comme advice comm comment est comment nent comment	ent ient nt			

- 4. Select Edit This will open a Notepad document
- 5. If this is the first time the Owner statement email text has been used, the following message will appear

Notepad	
	Cannot find the C:\REST\DATABASE\DATA\EmailWorkOrder.txt file. Do you want to create a new file?
	Yes No Cancel

- 6. Select YES
- 7. Type in the message that you would like to include on the outgoing email

EmailWorkOrder - Notepad File Edit Format View Help	- • •
Please find attached work order, please ensure that authorisation limits are confirmed and contact the relevant Property Manager should work exceed these limits.	*
All invoices are required to be received by the 25th of the month to ensure prompt payment.	
Thank you and Kind Regards, Rockend	

- 8. Go to File > Save
- 9. Go to File > Exit
- 10. Click OK-F12 to the company details screen

Example of creditor email

To:	Support				
Cc					
Subject:	Work Order for 34 Archer Street ANNANDALE NSW 2038 from Rockend Real Estate				
E message					
Please fin	nd attached work order, please ensure that authorisation limits are confirmed and contact the relevant Property Manager should work exceed these limits.				
All invoices are required to be received by the 25th of the month to ensure prompt payment.					
Thank you	u and Kind Regards.				
Rockend					

11. When issuing a quote request or work order to the creditor, you will need to ensure the option of 'Print & Email' is selected, if the quote request or work order is previewed and then emailed using

the **icon**, the work order will be sent via the outlook profile on the PC and will not include the creditor email text

🛠 Work Order			—X —
Options			
Print Work Order			
Email Work Order			
Print & Email Work Order			
Print Comments			
Font Select - F2	Preview - F11	Export - F10	Cancel - ESC

NOTE: At any time the outgoing email text can be edited by following the steps above and saving the document.

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