

## How to do an SMS merge in REST Professional

## Overview

You are able to send SMS messages through REST Professional providing you have a service provider. Microsoft word sends a series of emails to your service provider. The SMS service provider picks up the mobile number from the email and automatically forward the text message.

**NOTE:** This document should be used for all service providers other then Edgility/RockendSMS.

If using Edgility/Rockendsms as your service provider please see document <u>RockendSMS Enhanced</u> <u>Integration in REST Professional Version 14</u>

This document will cover:

- How to send an SMS via the Owner/Tenant card
- How to send a Bulk SMS

How to send an SMS via the Owner or Tenant card

- 1. Go to Files > Owner/Tenant
- 2. Enter the alpha index of the required owner/tenant and press Enter
- 3. Click on the mobile icon and SMS message box will pop up
- 4. Type the required message. The SMS field will allow up to 160 characters
- 5. To save to diary, ensure Add Diary Item is ticked
- 6. Click on Send SMS-F12

Alpha index AFI Name Be Genesal Pay Address Contact Salutation Home Work Fax Mobile E-mail Spit payme % amount re	FLECK     Active       n Attrack & Jenniter Gamer     Image: Construction of the state of t	Cancel - ESC Action - F1 Clear - F2 Delete - F3 Add Mode - F4 Search - F7 Last Edita - F9 UK - F12	¥ 51	MS Message to Enter SMS Mes Mr Affleck & M home has been	040000000 - Be sage to 0400000 s Gamer, Please t n booked for Satu em	n Affleck & Jen 000 - Ben Affleck be advised that a rday 9 - 9.45am.	nifer Garner Jennifer Garner n open Thank you.	Remaining Cancel - E Send SMS -	49 SC F12
REST Professio	nal IS Message to Ben Affleck & Jennifer Garner sent and recorded								

This will be sent via Microsoft Outlook and a copy will appear in your sent items.

## How to send a Bulk SMS

- 1. Go to Other > Print letters / Mail Merge
- 2. Merge with Select Owner or Tenant as required
- 3. Type of Letter Select the type of letter required from the drop down menu
- 4. Filter Select Valid under the Mobile Number selection
- 5. Selection Select All, Range or Select Owner/Tenants as required
- 6. Output Select SMS
- 7. Click on **browse** and select the SMS merge template
- 8. If you wish to record this on the tenant's ledger if doing a tenant SMS, tick the **Update tenant history** box
- 9. If you wish to save this to document management select the required fields as required
- 10. Click on **Preview-F11**

Print Letters /	Mail Merge			
Merge with	Tenant •	Filter Americ Date	16/11/2015	•
Type of Letter	Breach -	Use effective	areas	
Contact	Accounts	OR Days in Arrea	n 1 to 999	
Manager	Al	Email address	AI •	
Property Type	AI -	Mobile number	Valid •	
Sort and filte	r by Area Code Area Code	Include Vacated	Hent + Invoices *	
All	-			
Selection				
Status	Active •		Property order	
IA 😟				
Range	Start at Alpha Index			
Select	Finish-at.Alpha Index	v		
Output				~
O Mail Merge	Letter name			<b>^</b>
Enal	New document			Cancel - ESC
SMS ADI Error	C:\REST\Database\Word	Minear:/SMSMerge.DO	C Browse	L.P.
<ul> <li>Realworks</li> </ul>		Document Manageme	and .	Preyiew - F11
REI Forma Li	ve P	$\checkmark$		
				Stat-F12

11. Ensure you review the list of owners/tenants that have appeared in the SMS Preview to ensure they are all correct and you are happy with the list and click **Next** 

Abha	Name	Property Alpha	Include		
ALEAJ	Jeosica Alba	LOUISA16/7	×		Select All
ANISTONJ	Jenniter Aniston	GIESON40/4	1		
BERNALG	Gael Garcia Bernal	GIESON40/2	1		
BLOOMO	Orlando Bloom	H05K14/28	×	u .	
CLOONEY	George Clooney	GALL24	×	п.	
COOPERS	Sheldon Cooper	WHARF22	8		
CRUZP	Penelope Cruz	LAVE25			
DAMONIM	Matt Damon	HUD/S0N10/2		ш.	
DAVIDC	Craig Diavid	KENT78/207	2		
DAVISG	Geena Diavis	GIESON40/3	1		
DEPPJ	Johnny Depp	W/LDE3A	1		
DIESEL	Vin Diesel	JONES43	×		
DIRTYHAR	Beyonce Knowles	CR0WN42	8		
FEYT	Tina Fey	GIBSON40/1			~
FOXM	Matthew Fox	BR0525/5			Current For
FREEMANC	Ms Cathy Freeman	WARA10/1			Parcel - Ept
GREENEC	Cleaver Greene	TRAF264	1		
GYLLENJ	Jake Gylenhaal	WELLS19	4	-	Next

12. Completely **Exit** the WORD Document by clicking on the red **X** up the top right hand side in word



13. REST Professional will now prompt you with a message "Do you want to send these emails/SMS messages?" Click **Yes** 



14. REST Professional will then prompt you "Do you want to put this into document management". Click on **Yes** if you would like the SMS message document to be saved in document management.



15. A message will now appear advising "All letters were Emailed successfully" Click **OK** 

This will now be sent via the SMTP (if setup) or Microsoft Outlook to your service provider. If using an SMTP a copy of the emails will be sent to the inbox of the sent items email address listed in the **System Options > SMTP** tab or if using Microsoft Outlook a copy of these will appear in your sent items.

02/02/2016 10:59 am AEDT