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 RockendSMS Enhanced Integration in REST Professional Version 14

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**

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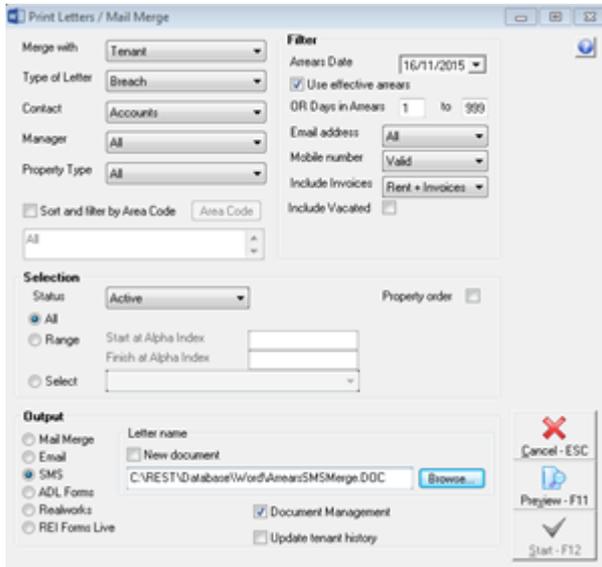
11. Ensure you review the list of owners/tenants that have appeared in the SMS Preview to ensure they are all correct and you are happy with the list and click **Next**


12. Completely **Exit** the WORD Document by clicking on the red **X** up the top right hand side in word
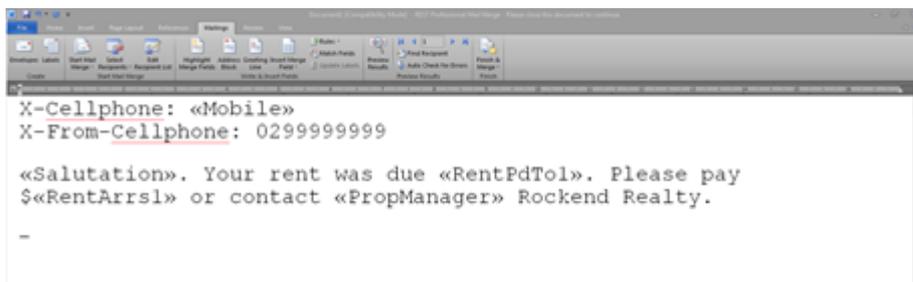
13. REST Professional will now prompt you with a message "Do you want to send these emails/SMS messages?" Click **Yes**
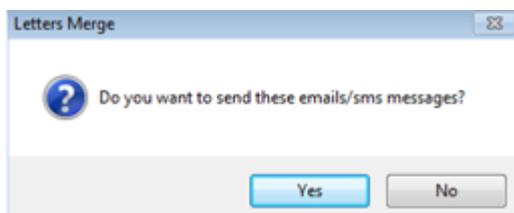
14. REST Professional will then prompt you "Do you want to put this into document management". Click on **Yes** if you would like the SMS message document to be saved in document management.
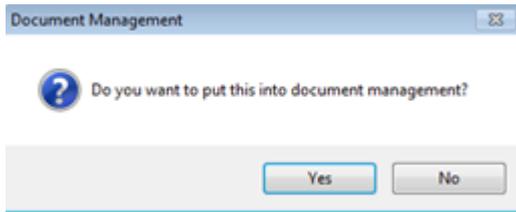
15. A message will now appear advising "All letters were Emailed successfully" Click **OK**

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.

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