



# Additional Owner Contacts Setup and Use in Rest Professional

## Overview

Rest Professional v14.5 introduces enhancements to the existing Additional Address Details feature to allow multiple additional owner contacts to be saved against each ownership. The enhancement allows more details to be recorded for each additional owner contact, and will be available for Residential, Commercial and Holiday Rental Owners.

The new feature includes:

- The ability to record more contact details and preferences for each additional owner contact
- The ability to assign a contact type for each additional owner contact e.g. Primary, Repairs, Lease, Accounts
- An extended Ownership Name field allowing up to 100 characters
- The ability to print a list of all additional contacts saved against an ownership
- The ability to select an owner contact type for bulk mail merges
- The ability to send an email to all owners linked to the ownership directly from Owner Details

## Changes to Existing Screen in Rest Professional - Owner Details > General Tab

- The Name field underneath the Alpha Index has been re-labelled **Ownership Name** and the maximum character count has been increased from 40 to 100
- The **Ownership Name** field has been extended to display more of the details entered. A tooltip will display up to 100 characters
- A new button labelled **Add new Contact** will load the new Additional Owner Contact screen
- A new button labelled **View all Contacts** will display all contacts linked to the ownership in a grid layout

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## Primary Owner

- A new section named **Primary Owner** is available to display the details of the Owner on the General tab. The following extended information can be now recorded for the Primary Owner:
  - Title
  - First Name
  - Last Name
  - Name (will now be automatically completed when First Name and Last Name are populated for

the first time)

- Salutation – will display the Salutation displayed in the Contact section prior to the upgrade

**NOTE:** The Primary Owner's details will be used for all owner reports that do not offer the option of filtering by contact type, for example the Ownership Report or the Ledger Report.

## Contact Details

- The Contact section has been renamed **Contact Details** and the layout has been improved to include the Primary Owner's Address details.

## Communication

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- A new section named **Communication** is available on the General tab of Owner Details to allow the following information to be entered:
  - Preferred Communication Method (Post or Email)
  - Statement delivery method and Quantity
  - Income & Expenditure Report delivery method
  - Contact types of Primary, Lease, Accounts and Repairs
  - Comments
- A new section named **Communication** is available on the General tab of Owner Details to allow the following information to be entered:
  - Preferred Communication Method (Post or Email)
  - Statement delivery method and Quantity
  - Income & Expenditure Report delivery method
  - Contact types of Primary, Lease, Accounts and Repairs
  - Comments
- The **Send Statement by Email** label and checkbox will be removed from the Payment tab.
  - If this option was checked for the Primary Owner at upgrade, the **Send Statement by option** in the new **Communication** section of the General tab of Owner Details will default to Email
  - If this option was unchecked for the Primary Owner at upgrade, the **Send Statement by** option in the new **Communication** section of the General tab of Owner Details will default to Post

- This value specifies the number of copies of the Owner Statement to be generated for the primary owner.
  - If **No. of Copies** was set on the Payment tab prior to upgrade to generate additional copies of the Primary Owner's statement, the **Quantity** will be set to ensure the same number of copies are generated after the upgrade.
  - If the delivery method is set to Email, the quantity will only apply to printed copies of the statement - only one email will be delivered.
- A new option **Send Income & Expenditure Report by** will display and will default to Post for each Primary Owner when upgrading to Rest v14.5.
  - **Send Statement by and Send Income & Expenditure by** option will be set to Post by default when a new owner is added in Rest Professional.

## Contact Types

- Each Ownership must be assigned one Primary Contact, and only one Primary Contact can exist per ownership. When upgrading to Rest v14.5, the Primary Owner will be set as the Primary Contact by default.
- The Primary Contact can be reassigned by selecting the primary contact checkbox on the additional contact screen of the owner you wish to assign as the Primary Contact. When an additional contact set as the Primary Contact is deleted, the Primary Owner will automatically be set as the Primary Contact.
  - Only one Primary Contact can be assigned per ownership
  - Multiple Lease, Accounts and Repairs contacts may be assigned to an ownership
  - A contact may be assigned multiple contact types

## Split Payments

- Split Payment details will continue to display on the General tab

**Note:** For Split Owners, additional Contacts can be added however the ability to send Owner Statements and Income & Expenditure reports is not possible, however can be sent manually.

## Owner Details > Payment Tab

- Additional Address Details saved on the Payment tab at upgrade will be automatically converted to Additional Contacts
- The **Send Statement by Email** label and checkbox will be removed from the Payment tab
- The **Name, Address, Email address and Send Statement by Email** setting for each existing

Additional Address will be retained during the upgrade, and will display in the new Additional Owner Contact screen for each record

- The Additional Address Details label and button will be removed from the Payment tab
- The **No. of Copies** label and drop-down will be removed from the Payment tab and pre-upgrade values will be set as Statement Quantity on the Communications section of the General tab.
- Group and Layout style will continue to display in the Statement control section of the Payment tab

## Owner Reports

As many characters of the *Ownership Name* as possible will display on owner reports. The *Owner Detail Report* can be filtered to display:

- **Account types:** Owners Only, Internal Owners Only or All
- **Contact type:** Primary Owner Only, All Owners Only or All Owner Contacts
- **Sort Order:** Owner, Property, Manager/Property or Manager/Owner

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The Ownership name will display in bold font on the report generated, followed by additional contacts in the following order:

- Primary Owner
- Primary Contact
- Contacts marked as an owner alphabetically
- All other contacts types alphabetically

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## New Screens in Rest Professional

### Additional Owner Contact screen

A new Additional Owner Contact can be added by selecting the **Add new Contact** button on the Owner Details screen. This new screen allows the following information to be entered for each contact linked to an ownership:

### Correspondence Details

- Owner status -When a new Additional Owner Contact is added, the Owner flag is optional.

- Relationship (to Primary Owner e.g. Spouse, Accountant)
- Title (Mr, Mrs, Ms Miss, Dr, Prof, Hon)
- First Name
- Last Name
- Name
  - During the upgrade the Name previously entered in the Additional Address Name field will be copied to the Name field
  - When adding a new Additional Owner Contact the Name field will be automatically completed when First Name and Last Name are populated for the first time
  - Salutation - during the upgrade the Name previously entered in the Additional Address Name field will be copied to the Salutation field for each contact. An option is available here to create a Microsoft Word document for each Additional Owner Contact.

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## Contact Details

- Home phone number
- Work phone number
- Fax number
- Mobile number - an option is available to create a SMS message for each Additional Owner Contact
- Email address - an option is available to create a single email for each Additional Owner Contact
- Address Line 1,2, and 3
- Primary Address button- an option is available to populate the contacts address fields with the Primary Owner street address details
- Exclude from bulk letter merge - an option is available to remove an Owner contact from receiving bulk letter correspondence

**NOTE:** Two owners with the same postal address

To ensure only one letter is sent to Owners during bulk mail merges, populate the Primary Owner's Salutation field with both Owner names. Create an Additional Owner Contact flagged as an Owner for the second owner, select the **Use Primary Address** button to copy the address, and select the **Exclude from bulk letter merges** option. When using **Print Letters / Mail Merge** with the output option Mail Merge, only one letter addressed to the Primary Owner will be generated and the Salutation will contain both owner names.

## Communication

- Preferred Communication Method
- Send Statement by (None, Post or Email)
- Send Income & Expenditure Report by (None, Post or Email)
- Contact types of Primary, Lease, Accounts and Repairs. Multiple contact types may be assigned to each owner contact.
- Comments

## Ownership Contacts grid

The Ownership Contacts grid displays all additional contacts linked to an ownership. A new Additional Owner Contact screen can be added by selecting the **Add new Contact** button on the **Ownership Contacts** screen. The Ownership Contacts grid is accessed by selecting the **View all Contacts** button on the Owner Details screen.

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- The Primary Owner will be the first contact in the Ownership Contacts grid by default in Read-Only mode and cannot be selected from the grid view. The Primary Owner's details must be edited on the General tab
- Additional contacts flagged as an **Owner** will display immediately underneath the Primary Owner
- The grid displays the following information about each contact linked to the ownership:
  - Owner status
  - Salutation
  - Contact Type
  - Preferred Communication Method
  - Relationship
- Additional contacts can be loaded, edited and saved directly from the Ownership Contacts grid. Modified details will be automatically updated in the Ownership Contacts grid
- An option is available to add an Additional Owner Contact from the Ownership Contacts grid
- An option is available to preview, print or export a list of all the contacts linked to an ownership
- An option is available to send an email to all owners (Primary Owner and all Additional Owner Contacts flagged as Owners) via Outlook from the **Email Owners** button.

## Archiving, Replicating and Deleting

- Additional Owner Contacts cannot be archived. When an Additional Owner Contact is deleted their data cannot be retrieved at a later stage.
- When an ownership is replicated, the additional owner contacts linked to the original ownership will be copied to the replicated ownership.

## Changes to Smart Search

Additional Owner Contact will be searched when entering a search string in Smart Search

## Mail Merge with Additional Owner Contacts

### Mail Merge Fields

The new Owner fields introduced as part of the Additional Owner Contacts feature are now available when creating Microsoft Word mail merge templates or exporting data for Owners. The **Owners Merging Variables List** in the Rest Professional Help file v14.5 has been updated to display the new merge fields.

### Print Letters / Mail Merge

When selecting to Merge with Owners, an option is now available to select the Owner Contact Type to include in the bulk merge.

- The default will be set to Owners Only which includes the Primary Owner as well as Additional Owner Contacts flagged as Owner
- Other Owner Contact Type options include Primary, Accounts, Lease, Repairs and All

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### Export Data

When selecting to Export to Excel, File or New Template and Merge with Owners, an option is now available to select the Owner Contact Type.

- The default will be set to Owners Only which includes the Primary Owner as well as Additional Owner Contacts flagged as Owner
- Other Owner Contact Type options include Primary, Accounts, Lease, Repairs and All

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### RockendSMS

When selecting to Merge with Tenant and the Output Option is RockendSMS, an option will be available to Send SMS Message to Owner and then select an Owner Contact Type.

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### Owner Statements

Primary Owners will automatically be configured to receive their statement by Post or Email when upgrading to Rest v14.5, based on their statement delivery option prior to the upgrade. The **Send Statement by**

options for the Primary Owner are Post and Email.

The statement delivery options for Additional Owner Contacts will be automatically set when upgrading to Rest v14.5 based on the previously selected option in Additional Address Details on the Payment tab of Owner Details.

Additional Contacts added after upgrading to Rest v14.5 can be configured to receive statement in the **Communication** section of the Additional Contact screen. The **Send Statement by** options for Additional Owner Contacts are None, Post and Email.

## Income & Expenditure Report

Primary Owners will automatically be configured to receive Income & Expenditure Reports when upgrading to Rest v14.5. Income & Expenditure Reports will be delivered via the **Send Income & Expenditure Report by** option selected e.g. Post or Email.

Additional Contacts added after upgrading to Rest v14.5 can be configured to receive Income & Expenditure Reports in the **Communication** section of the Additional Contact screen if they have been configured to receive statements by Post or Email. Income & Expenditure Reports will be delivered via the **Send Income & Expenditure Report by** option selected The options for Additional Owner Contacts are None, Post and Email.

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