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fileSMART PrintMail Collation and Document Redaction Setup and Use Guide

Overview

With the introduction of the Owner & Tenant Water invoice workflow using a Tenant Water rates collation in PrintMail will deliver Tenant invoices and water rates bills to your Tenants so much faster as you no longer have to search for an archived water rate bills collate it with the Tenant water usage invoice, stuff envelopes and then email or mail them to your Tenants. Every day or any other time you choose, fileSMART PrintMail can collate all of your Tenant Water usage invoices so that you make sure you get them to your Tenants same day in order for them to pay the invoice so that you can reimburse your Owners.

Clients That Already Have PrintMail Tenant Water Collations Setup

If you already have a PrintMail Tenant water collation setup in PrintMail Jobs and want to use the new Owner & Tenant Water invoicing workflow to send your Tenant water usage invoices you will now need to make sure that the 'Tenant Water Rate copy' document type is selected in the Tenant Water rates job. This is because the 'Tenant Water Rate copy' document type is automatically used by fileSMART when the water rates bill is automatically archived for the Tenant during the Owner & Tenant Water invoicing workflow approval process.

If the PrintMail Tenant water collation setup does not already have the 'Tenant Water Rate copy' simply add it to the list of available document types to collate.

PrintMail Redaction Function

To complement the new REST Owner & Tenant Water Invoicing it is now possible to hide sensitive information on a document before PrintMail collates and then distributes that document. The process of hiding that information is called redaction. A template can now be configured to redact any outlined areas of the selected document type. For example when sending owner water rates bills to tenants for water usage invoicing the owners address and the Water bills payments details can be redacted from the Water rates copy sent to the tenant. The redaction process is applied globally to all documents of the same document type on the PrintMail job selected. For example:

DOCUMENT TYPE	GROUP NAME	PRIMARY DOCUMENT	REDACT
Tenant REST Tax Invoice	PropertyManagement	☑	
Tenant Invoices	PropertyManagement	☐	
Tenant Water Rate Copy	PropertyManagement	☐	☑

Simply select the document that needs to be redacted press the REDACT button and the uer will then be

prompted to browse and select a tiff to use as a template for the PrintMail Job redaction process.
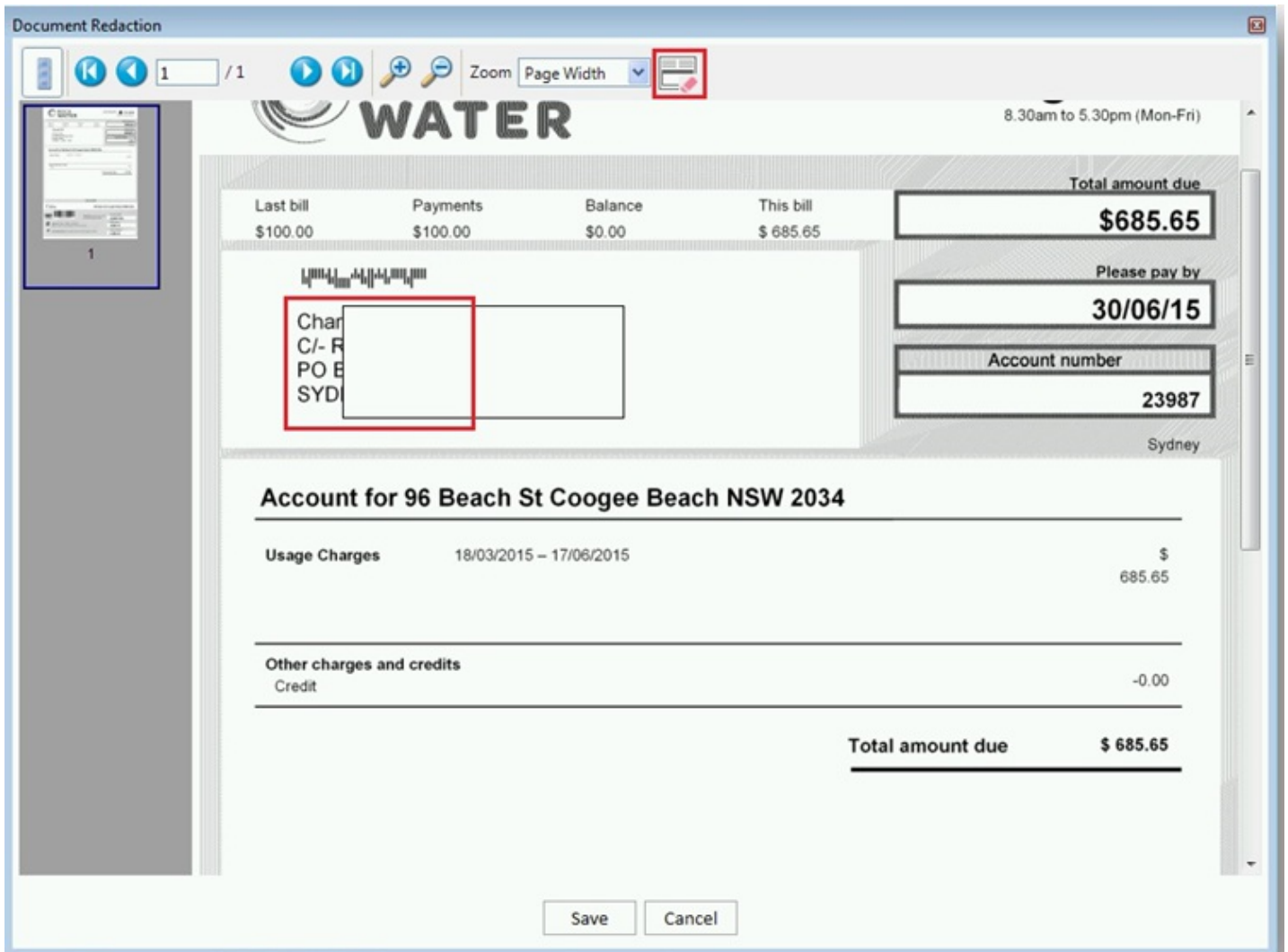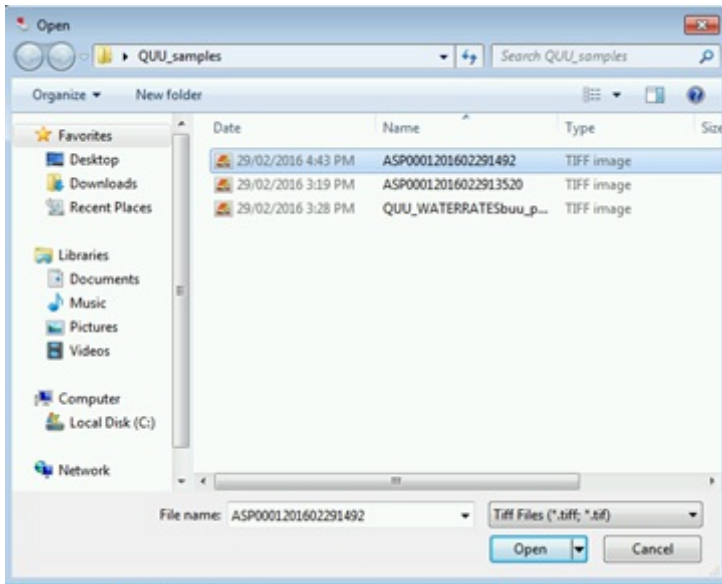
Press the redact button shown in the example about in the red box, then use the mouse to select and drag the redact box over the zone or area that needs to be hidden. The area that has been redacted is highlighted as a black box, see the example above where the owner address has been hidden. Once all the redaction zones have been defined simply press the Save button.

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