rockend

Setup and use of Business Alerts in REST Professional

Overview

In Rest Professional you now have the ability to nominate a user to receive a Business Alert via email when a Bank Reconciliation and System Backup have not been performed for a set number of days.

The alerts will be triggered when the first user logs into REST for the day and if the SMTP server is successfully configured. Refer to the Sensitive Change Alert Setup and Use in REST Professional article on the Prerequisites and Configuration for SMTP required for these alerts to work.

Steps

1. Go to **Files > User**

2. Click on **Search - F7** and select the User you would like to receive the alerts.

3. Select the user profile tab and ensure that the user has a security level of

    Statistics/Company details/Passwords and above

4. Ensure the box is ticked for **Sensitive Change Notification**

5. In order to set up the alerts the user must be selected as a **Principal/ Director.** This will

    then highlight the additional tab for **Business Alerts.** Click on this tab

User Details (User Profile tab)

Initials: CK [Active]

First Name: Clark   Last Name: Kent

Full name: Clark Kent

General | User Profile | Login Options | Portfolio Access | Business Alerts

Password: **

Security Level
System: Statistics/Company Details/Passwords & above
Print Letters / Export Data: Manage Templates & above
Sales: All Files maintenance & above

Principal / Director ☑
Property Manager ☑

Salesperson ☐
Sensitive Change Notification ☑
Web Advertising Contact ☑
Toolbar View: Property Management

Outlook Synchronisation
Sync REST Contacts for: All Property Managers
Sync REST Diary ☑

Cancel - ESC
Clear - F2
Delete - F3
Add Mode - F4
Search - F7
OK - F12

User Details (Business Alerts tab)

Initials: CK [Active]

First Name: Clark   Last Name: Kent

Full name: Clark Kent

General | User Profile | Login Options | Portfolio Access | Business Alerts

Business Alerts to Principal/Director

Business Alert Types

☑ Receive a Business Alert when a Bank Reconciliation is not
performed in 1 days

☑ Receive a Business Alert when System Backup is not
performed in 1 days

You will now receive the above selected Business Alerts via the email address registered in your User Contact details.

Cancel - ESC
Clear - F2
Delete - F3
Add Mode - F4
Search - F7
OK - F12

6. Use the checkboxes to select which types of Business Alerts you would like to receive when set number of days overdue.

- If the option is selected for "Receive a Business alert when Bank Reconciliation is

not performed" then the user will receive an email on the allocated number of days past the last time a Bank reconciliation was performed. To set the number of days please select from the drop down box.

- If the option is selected for "Receive a Business alert when System Backup is not performed" then the user will receive an email on the allocated number of days past the last time a System Backup was performed. To set the number of days please select from the drop down box.

When the options selected are not subsequently performed, further Business Alert emails will continue to be sent on the set number of days after the last email was sent. For example, if Receive a Business alert when Bank Reconciliation is not performed in 7 days is set then the user will receive a business alert every seven days until the Bank Reconciliation is completed.

- All alert emails will display the following related trust information:
- Database Name (License Name)
- Trust Account Name (Trust Account Name)
- Trust Account BSB
- Trust Account No

7. Select **OK – F12** to save the user changes

Examples

Below is an example of each of the Business Alert emails that will be sent to the Principle/Director.

System back up Alert

Dear Clark

A System Backup has not been completed for 28 days in REST Professional for the following Trust Account:

Database Name: Rockend Training Centres
Trust Account Name: ROCKEND TRUST ACCOUNT
Trust Account BSB: 062-123
Trust Account No: ****7576

You are receiving this email because you are configured in REST Professional as a Principal/Director with Business Alerts. To change your alert settings, log into REST and edit your user profile.

Bank Reconciliation Alert

Dear Clark

A Bank Reconciliation has not been completed for 1 day in REST Professional for the following Trust Account:

Database Name: Rockend Training Centres
Trust Account Name: ROCKEND TRUST ACCOUNT
Trust Account BSB: 062-123
Trust Account No: ****7576

You are receiving this email because you are configured in REST Professional as a Principal/Director with Business Alerts. To change your alert settings, log into REST and edit your user profile.

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