Setting up additional contacts in Rest Professional and File Smart Print Mail

Overview

Some of the settings used on the owner card (Owner Details > General) and any additional contact card in Rest Professional by customers who also use File Smart Print Mail, differ from those used by customers who use Rest Professional itself to distribute statements.

The 'Preferred Communication Method' setting has no influence on whether emails are sent from File Smart Print Mail or not. Also the 'Send Statement by' and 'Send I&E report by' options have no influence on whether the statements are emailed or printed from File Smart Print Mail.

All email addresses in the ‘Email’ field on the owner card or an additional contact card will be brought over to File Smart Print Mail when a ‘Rest Professional Trust Update’ is done from File Smart Archive.

Additional contacts with an email address and ticked as ‘Owner’ at the time the contact is created in Rest Professional, will be emailed from File Smart Print Mail. The 'Do not use' box in the Contacts task screen will be UNTICKED.

Additional contacts with an email address and not ticked as ‘Owner’ at the time the contact is created in Rest Professional, will not automatically be emailed from File Smart Print Mail. The ‘Do not use’ box in the Contacts task screen will be TICKED. This will have to be unticked in File Smart Print Mail if the contact is meant to get an email.

Changes made later in Rest Professional to the ‘Owner’ tick box for the additional contacts will not change the state of the ‘Do not use’ box in File Smart Print Mail. If the additional contact is to receive, or not receive, an email, the ‘Do not use’ box will have to be TICKED or UNTICKED manually as appropriate.

No other settings in the owner cards in Rest Professional are relevant to File Smart.

The 'Send Statement by' option doesn't control whether File Smart Print Mail emails or prints. If it is set to ‘Email’ or ‘Post’, it tells Rest Professional to generate a customised statement for that contact with their name and address at the top whenever a statement is produced for the main owner. The ‘Send Income & Expenditure Report by’ option works similarly for I&E Reports. Where File Smart is being used however, all these multiple statements will be received by all the email recipients on the main owner and additional contacts cards. This is undesirable.

To prevent this, only the main owner card should have these options selected. They should be blank on the other cards.

Any changes made in Rest will only be imported into File Smart when an Update from Trust is done in File Smart Archive or automatically overnight.

Rest Professional settings

Owner card

- Enter an email address if one has been supplied. Only one can be entered and it must only contain valid characters. This email address will be imported to File Smart when an update from trust is run.

- Set the ‘Preferred communication method’ to the owner’s preference, or leave it blank.
- Set the ‘Send Statement by’ and the ‘Send Income & Expenditure Report by’ options to ‘Email’ or ‘Post’. These are required by Rest Professional.

  File Smart Print Mail doesn’t use these settings to decide what is to be printed and what is to be emailed. See the next section for what does control this.

- Set the number of copies to one.
- Complete the rest of the card as described in Rest Professional Help or the online Rockend Knowledgebase article ‘How to Add a New Owner Card in REST Professional’.

Additional Contact card

- Enter an email address if one has been supplied. Only one can be entered and it must only contain valid characters. This email address will be imported to File Smart when an update from trust is run.

  NOTE: If an additional contact card has the same email address as the main owner card and the additional contact isn’t ticked as ‘Owner’, then File Smart Print Mail will set that email address as ‘Do not use’.

- Set the ‘Preferred Communication Method’ to the contact’s preference, or leave it blank.
- Leave the ‘Send Statement by’ option blank.
- Leave the ‘Send I&E Report by’ option blank.

- Complete the rest of the card as described in Rest Professional Help or the online Knowledgebase article ‘Additional Owner Contacts Setup and Use in REST Professional’

File Smart Print Mail settings

Emailing and/or printing are controlled by the 'Send option' in the Contacts task screen and the state of the 'Do not use' box beside each email address as follows.

Send Option – 'Email if Available'

- If the 'Do not use' box for the email is unticked then an email will be sent to the displayed email address. Nothing will be printed.

- If some of the 'Do not use' boxes are ticked and other are unticked, then an email will be sent to those that are unticked. Nothing will be printed.

- If all the 'Do not use' boxes are ticked, one copy of the owner's documents will be printed.

Send Option – 'Print (Do not email)'

- One copy of the owner's documents will be printed.

- All email addresses for the owner will be ignored.

Send Option – 'Email and Print'

- Emails will be sent to all email addresses listed for that owner where the 'Do not use' box is unticked.

- One copy of the owner's documents will be printed.

Send Option – 'Do not issue'

- Nothing will be emailed.
- Nothing will be printed.

Update from Trust

Changes made in Rest Professional to property, owner, tenant, or creditor details will only come across to File Smart when an update from the trust database is done. This is done automatically as a scheduled task or can be run on demand.

Scheduled task

An update from trust should occur automatically overnight. During the implementation of File Smart for a customer, a scheduled task on the File Smart server is set to run every morning at 1:00am. Your IT support may have altered this timing but it should still occur automatically.

Run on demand

An update from trust can be run by any File Smart Archive user if the new or altered information is required in File Smart immediately.

- Drop down the 'File' menu
- Select 'REST Professional Trust Update'
- A dialog box opens on screen
- Click 'OK'
- When the process is complete, a message will appear in the notification area of your computer screen. The time the process takes depends on the number of properties, owners, tenants, and creditors in the Rest Professional database. It could take several minutes for a large database.
- For the new or changed details to display in File Smart Archive or File Smart Print Mail, you'll need to close the programs and re-login.

If the new or changed details haven't come across to File Smart please contact Rockend support.

NOTE: An update from trust is not a backup of the File Smart database and documents. Backups must be done as a separate task. For a guide on backing up your File Smart data go to the article on the Rockend Customer Lounge http://kb.rockend.com/help/filesmart-backups

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