

## How to Set up Document Management in Rest Professional

### Overview

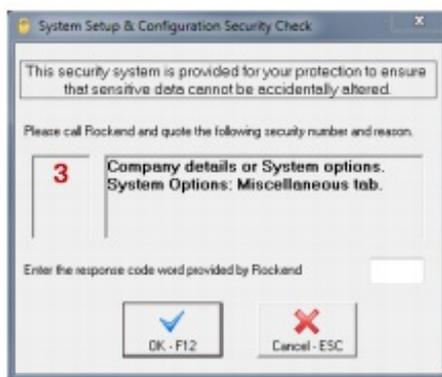
Document Management in Rest Professional allows you to keep electronic copies when you send letters, bulk emails or bulk SMS messages to owners, tenant, creditors, vendors, buyers and holiday bookings. REST saves a copy of the correspondence in a unique folder that is accessed by the Document Management icon on each master file in Rest.

**Note:** Before setting up REST Document Management you must have Unique Alphas enforced.

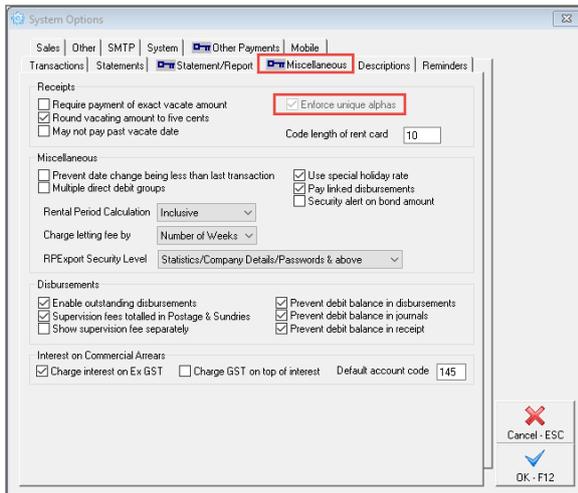
### Enforcing Unique Alpha Codes

Each owner, property, tenant, sale, booking and creditor has a folder associated with it to store documents. The folder is the same name as the alpha index for that owner, tenant etc. Each Master File must have a unique alpha index so that the document management folders also have unique alpha indexes.

1. Go to **Other> Utilities> System Options> Miscellaneous Tab**

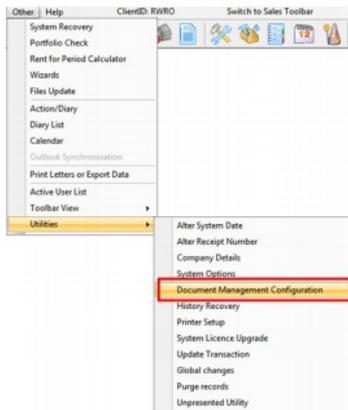


**Note:** You will need to contact Rockend Support for a Response Code to proceed at this point.

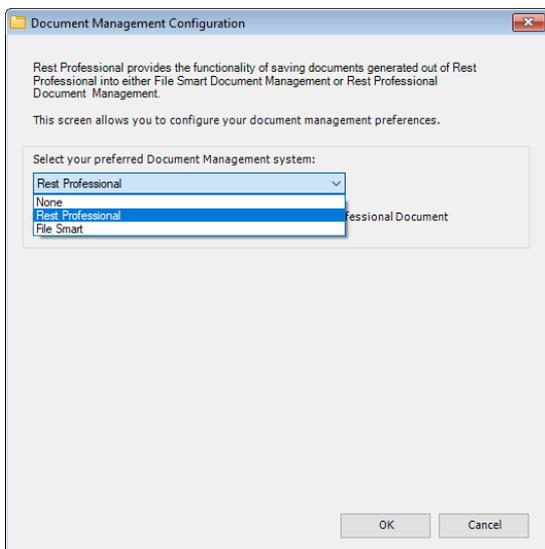


## Setting up Document Management in Rest Professional

### 2. Go to **Other > Utilities > Document Management Configuration**

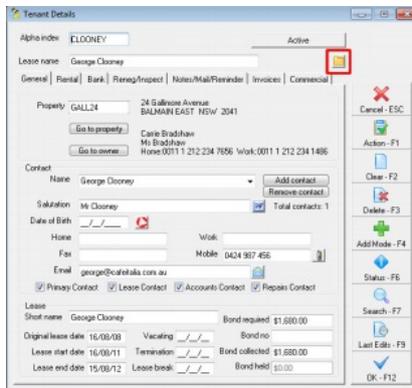


### 3. Select Rest Professional from the drop down list as your Document Management System & click **OK** to save.



# Accessing Saved Documents in Document Management

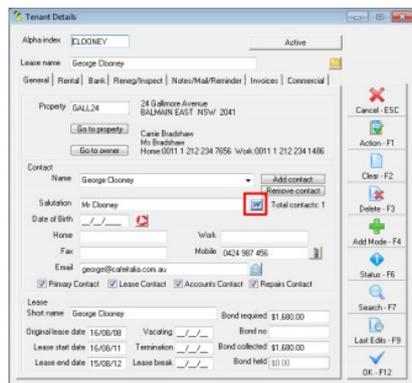
Go to **Files > Tenant Details** > Click on the yellow Document folder in the top Right Hand Corner.



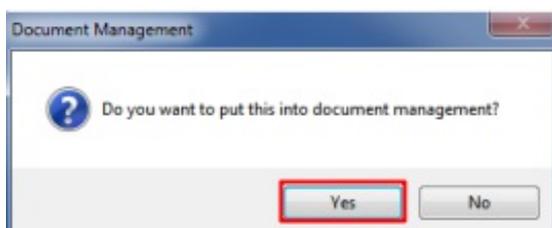
This will redirect you to the Document Management location on your server and you will be able to access all of your created documents.

# Creating & Saving a New Document to Document Management

After you have switched on the option, you will notice the 'Document Management' check box on the Letter Writing screen and when you click on the Word icon on the detail screens of the owner, property or tenant details.



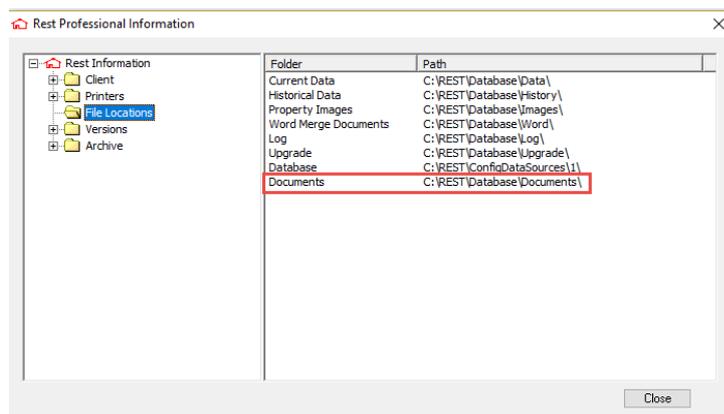
When you merge letters to word and use the bulk email and SMS options, Rest will ask you whether you want to save the documents and will save the documents in the individual folders.



## Saving Other Documents to Rest Document Management Folders

As well as Rest saving copies of letters, emails etc. if you wish to save other miscellaneous documents in the REST Document Management folders, you may copy or scan any information you like into these folders. (Lease Agreements, photos, copies of tenant Invoices, arrears notices etc.) You can find the Document Management Folder within the REST folder on the server. You can ascertain the exact location of this folder by going to **Help > About Rest > Rest Info** and clicking on **File Location**.

. The **Documents** path can be located on the right hand side which will give the path.



In the document folder there are sub folders for Tenants, Owners, Properties, Holiday Bookings, Creditors, Sales and Solicitors. These in turn hold the individual folders for each owner, property & tenant.

Name	Date modified	Type	Size
Data	16/05/2019 3:44 PM	File folder	
<input checked="" type="checkbox"/> Documents	16/05/2019 3:44 PM	File folder	
History	16/05/2019 3:44 PM	File folder	
Images	16/05/2019 3:44 PM	File folder	
KPI	14/05/2019 8:47 AM	File folder	
Log	16/05/2019 3:44 PM	File folder	
My pictures	09/05/2019 9:02 AM	File folder	
Pics	09/05/2019 9:02 AM	File folder	
qlinew	09/05/2019 9:02 AM	File folder	
Quickbak	16/05/2019 3:44 PM	File folder	
RockendLogos	09/05/2019 9:02 AM	File folder	
Upgrade	16/05/2019 3:44 PM	File folder	
Word	16/05/2019 3:44 PM	File folder	
headerGrey.jpg	07/10/2015 9:34 AM	JPG File	589 KB

Name	Date modified	Type	Size
Creditors	16/05/2019 3:44 PM	File folder	
HolidayBookings	16/05/2019 3:44 PM	File folder	
Owners	16/05/2019 3:44 PM	File folder	
Properties	16/05/2019 3:44 PM	File folder	
Sales	16/05/2019 3:44 PM	File folder	
Solicitors	16/05/2019 3:44 PM	File folder	
Tenants	16/05/2019 3:44 PM	File folder	

16/05/2019 5:15 pm AEST