

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.

Document Management Configuration	×
Rest Professional provides the functionality of saving documents generated out of Rest Professional into either File Smart Document Management or Rest Professional Document Management. This screen allows you to configure your document management preferences.	
Select your preferred Document Management system:	
Rest Professional	
None Fessional Fessional Fessional Document	
The Smart	
OK Cance	1

Accessing Saved Documents in Document Management

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

Alpha index	CLOONEY	A	ctive
Lease name	George Clooney		
General Ren	al Bank Reneg/Inspect	Notes/Mail/Reminder Invoices C	Commencial
Property	GALL24 24 Galine BALMAIN	ore Avenue I EAST NSW 2041	Cancel - ESC
	Go to property Carrie Bro Mo Brade	idihaw haw	Action - F1
Contact Name	George Clospey	• Adda	centact Clear - F2
Salutation	Mr Clooney	Remove Total of	contact: 1 Delete - F3
Date of Bith Home	🙎	Wak	Add Mode - F4
Fai Emai	george@cafeitalia.com.au	Mobile 0424 987 456	Statur - FB
V Primary	Contact V Lease Contact	I Accounts Contact I Repairs C	Search - F7
Original lease	date 16/08/08 Vacating	Bond required \$1,680	Last Edits - F9
Lease end	tate 15/00/17 Lease break	Bond held sn on	

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.

Tenant Details					E
Alpha index	LOONEY			Active	1
Lease name G	eorge Clooney				
General Renta	al Bank Rene	/Inspect Notes/W	fail/Reminder Invoic	es Commercial	
Property 0	ALL24	24 Galimore Aven BALMAIN EAST 1	we NSW 2041		Cancel - ESC
6	Go to property	Carrie Bradshaw Ms Bradshaw			Action - F1
Contact	Go to owner	Home:0011 1 212	234 7656 Work:0011	1 212 234 1486	
Name	George Clooney		-	Add contact emove contact	Clear P2
Salutation	Mr Clooney		[W]	Total contacts: 1	Delete - F3
Date of Birth Home		Q .	Work		Add Mode - F4
Fax		h	Aubile 0424 987 456	1	
Enail	george@cafeita	ia.com.au			Status - F6
Primary 0	Contact 💟 Lea	e Contact 🛛 Aco	ounts Contact 📝 Rep	pairs Contact	Q
Lesse Shot name R	ierene Filozoek		Bandaratinet		Search - F7
Original lease d	ate 16/08/08	Vacating _/_/	Bond no	\$1,680.00	
Lease start d	ete 16/08/11	Termination _/_/	Bond collected	\$1,680.00	Lascedis - PS
Lease end d	ste 15/08/12	.ease break _/_/	Bond held	\$0.00	0K . F12

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	Туре	Size			
Data	16/05/2019 3:44 PM	File folder				
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				
	14/05/2019 8:47 AM	File folder				
Log	16/05/2019 3:44 PM	File folder				
Mypictures	09/05/2019 9:02 AM	File folder				
alinew	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 mo	odified	Туре	Size
Creditors			16/05/2	019 3:44 PM	File folder	
HolidayBookings			16/05/2	019 3:44 PM	File folder	
Owners			16/05/2	019 3:44 PM	File folder	
Properties			16/05/2	019 3:44 PM	File folder	
Sales			16/05/2	019 3:44 PM	File folder	
Solicitors			16/05/2	019 3:44 PM	File folder	
Tenants			16/05/2	019 3:44 PM	File folder	

16/05/2019 5:15 pm AEST