

Console and fileSMART PrintMail EOFY checks

The following will ensure that Financial Statements printed from the Console Send Assist module to the PrintMail

Send Assist printer will be auto archived correctly.

1. The person who does EOM/EOFY should

a) connect to a workstation with Console Gateway Live,

b) Open fileSMART PrintMail and check there is a Job Design containing 'End of Year Statement' and if not,

create an 'EOFY and June Statement Run' or an 'End of Year Statement Run' according to the way they

want to run it,

c) Follow steps 2 (a)-(h) in Console Gateway Live.

If a Console upgrade is done before EOFY the titles may have been reset to the defaults and should be

checked again.

2. In Console Gateway Live:

a) Open Tools -> Options -> Statements -> Statement Type.

b) Select Type 'Financial Year'.

c) Select Configuration 'Title'.

d) Change title to 'Financial Year Statement'.

e) OK (**DO NOT** click 'Apply to All').

f) Repeat for 'Creditors' and 'Owners'.

g) Check the Console Send Assist printer preferences in Console Gateway Live:

Tools > Send Assist > Preferences > PrintMail Send Assist printer

NOTE: These settings will need to be checked again if there is a Console Gateway Live upgrade before

end-of-financial-year.

3. Install the 'fileSMART PrintMail' printer if it isn't already installed on the computer – contact Rockend

fileSMART support on 1300 657 700 if assistance is required.

4. Depending on how the financial-year statements are processed in Console Gateway Live, the statements may

be listed in the Console Send Assist module or they may be listed in Console itself:

- If the FY statements are listed in Console Send Assist module they must be printed to the 'PrintMail Send

Assist Printer' just as they are usually done for monthly owner statements.

- If the FY statements are not listed in the Console Send Assist module but in Console itself, then they

should be printed to the 'fileSMART PrintMail' printer.

12/06/2019 9:34 am AEST