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# Owner's Consent for the Electronic Services of Notices and Documents in Rest Professional

## Overview

Rest Professional Version 18.5 introduces a new option on the Owner Detail screen to indicate an Owners preference on the electronic service of notices and other documents.

When the new System Option is enabled, owners who have not consented to receive notices electronically will be excluded from email communication from the following areas:

- Single or bulk emails
- Inspection letters from the Inspection Planner
- Owner reports and statements

#### This document will cover:

- Changes to Existing Screens in Rest Professional
- Reporting on Owner Electronic Consent
- Emailing Owner Reports and Statements
- Bulk Email from Print Letters / Mail Merge & Export Data
- Effects on Inspection Planner
- File Smart Integration
- Bulk Update Utility

# Changes to Existing Screens in Rest Professional

#### System Options

A System Option has been added and when enabled, owners who have not consented cannot be emailed from Rest Professional and will be excluded from email processes. Leave the option disabled if you wish to prepare your data by updating the Electronic Consent status of your owners, before enforcing the use of the option.

To enable Owner Electronic Consent:

- Ensure all other users are logged out of Rest Professional in order to save the changes in System Options
- 2. Other > Utilities > System Options
- 3. Select the Other tab > select Enforce Electronic Consent status for owner email
- 4. You will receive a pop up message to advise you that owner contacts who have not consented to

Electronic Communications cannot be emailed or receive emailed reports and statements, select Yes

to continue

5. Press OK-F12 to save

System Options	×
Transactions Statements Catement/Report Miscellaneous Descriptions Reminders Sales Other SMTP System Cather Payments Mobile	
<ul> <li>Miscellaneous</li> <li>Do not print properties on consolidated expenditure</li> <li>Include Unpresented report with Bank Rec report</li> <li>Use effective arrears for tenant export</li> <li>Use Water Invoicing</li> <li>Creditor insurance renewal reminder</li> <li>Use Sub-meter invoicing</li> <li>Display Tax Invoice confirm/edit message</li> <li>Use Realworks Forms</li> <li>Pay settlement day to purchaser</li> <li>Charge disb fee on quick disbursements</li> <li>Calculate arrears to selected day</li> <li>Warn if duplicate PM disbursement is found in current and</li> <li>Enforce Electronic Consent status for tenant email</li> <li>Incl. Financial Hardship Flag</li> </ul>	
Disbursements           Post all PM disbursements to outstanding         Quick disbursements use manual cheque sequence	
Charge fees Account code 462 Inspection Fees	
Laser report margins (mm) Top 8 Left 8 Reset Margins  Options for owner/tenant portal reports & emailing statements, remittances, work orders, quote requests  Right Print beader with company details	Cancel - ESC
Print neader with company details	OK - F12

#### **Owner Master File**

A drop down "Consented to the electronic service of notices" has been added to the Owner Master File, in the Contact section. The status can be changed at Owner contact level.

Prerequisites:

- A valid email address must be saved before an owner's status can be changed to "Yes"
- The email address must match the owner's nominated email address as per the signed consent form

The Electronic Consent options are:

- Not Recorded (default)
- Yes
- No

Alpha index BOND Active	
Ownership James Bond	
General Payment Notes Enquiry Properties 0/S Disbs Budget Tax & Charges	
Add new Contact View all Contacts	
Primary Owner	
Title 🗸 🗸	
First Name Last Name	
Name James Bond	
Salutation James	×
Contact Details	Cancel - ESC
Home Work +61 5792 9868	
Fax Mobile 0478 692 789	Action - F1
Email itsasecret@nooneknows.com.au	
Consented to the electronic service of notices Not Recorded	Clear - F2
Address C/- Secret Service Yes	
Carribean Hideaway 78946	Delete - F3
AGENT CODE 007	÷
Communication	Add Mode - F4
Preferred Communication Method	
Send Statement by Post V Quantity 1 V	Search - F7
Send Income & Expenditure Report by Post	
Primary Contact Lease Contact Accounts Contact Repairs Contact	Replicate - F8
Comments	Last Edits - F9
C-D	
Split payments	

#### Single Owner Email

When the Electronic Consent System Option is enabled:

- When selecting the Email icon next to the owner's nominated email address, the email function will only be available for owners who have consented to the electronic service of notices
- When the owner has not consented, a prompt will display and the email screen will not load

# Reporting on Owner Electronic Consent

#### Files Changes Report

All changes made to an owner contact's Electronic Consent status will be recorded on the Files Changes Report

• Reports > Other > File Changes

#### **Owner Electronic Consent Report**

A report is available to filter owners who have consented or declined electronic communications and also

tenants whose profiles have not been updated with this setting.

To access the Owner Electronic Consent Report, go to:

• Reports > Owner > Consent for Electronic Notices

The report can be filtered by All, Yes, No and Not Recorded. You can also filter by Contact Type - Primary, Lease, Accounts and Repairs. It displays the Owner Alpha, Name, Email Address, Contact Name & type, Consent Status and Last Update status date.

MRI Rest Profe © Copyright 20 Rockend Train ROCKEND RE	issional (20.0.04) 22 - MRI Software LLC ing Centres AL ESTATE TRUST ACCT		Date: 07/11/22	Page: 00
	OWNER CONSENT FOR THE	ELECTRONIC SERVICE OF NOTIC	ES AND DOCUME	NTS
Active Status: Active		From: 1 to: ZZZZZZZZZ Fr Consen Conta		ZZZZZ - All Owners For May 2022 Consent Status - All Contact Type - All
Owner Alpha	Owner Name Email Address	Contact Name Contact Type	Status	Last Updated
AFFLECK	Ben Affleck & Jennifer Garner jennifer@alias.com.au	Jennifer Garner	No	07/11/2022
AFFLECK	Ben Affleck & Jennifer Garner bena@affleck.com.au	Ben Affleck Primary, Accounts, Repairs, Lease	Yes	01/11/2022
ALYWALEED	Waleed Aly & Susan Carland	Susan Carland	Not Recorded	l

## **Emailing Owner Reports and Statements**

#### Single reports

When the Owner Electronic Consent System Option is enabled:

- There is no change to existing functionality if the owner has consented to the electronic service of notices.
- If the owner has not consented to the electronic service of notices, a prompt will display when emailing a report to a single owner by selecting the Email icon from the report Preview screen. When the prompt is dismissed, the email options screen will continue to display to make another selection.



#### **Owner Statements**

When the Electronic Consent System Option is enabled, selecting the option to send email statements when generating an owner statement will exclude owners who have not consented to the electronic service of notices.

#### Bulk Email from Print Letters / Mail Merge

When the Owner Electronic Consent System Option is enabled a new filter is available when creating merge letters for Owners.

- The filter will default to All
- When changing the filter to Yes, the results will only include owners who have consented to electronic service of notices
- When changing the filter to No or Not Recorded, the results will only include owners who have not consented to electronic service of notices
- When changing the Output type to Email, a prompt will display to automatically set the new filter to Yes

🖳 Print Letters / Mail Merge 📃 💷 💌							
Merge with	Owners	~	Filter				
Type of Letter	General	$\sim$	Owner Group	All V			
Contact	Owners Only	~	Email address Mobile number	All V			
Manager	All	$\sim$	Electronic Service	All V			
Property Type	All	$\sim$	of Notices Account types	All Not Recorded			
				No			
Selection							
Status	Active	/		Property order			
All							
🔘 Range	Start at Alpha Index						
	Finish at Alpha Index						
Select			$\sim$				
Output					×		
Mail Merge	Letter name				<u>C</u> ancel - ESC		
🔘 Email	New document						
O SMS				Browse	Preview - F11		
O ADL Forms O Realworks		D	ocument Manageme	nt	$\checkmark$		
		U	pdate tenant history		<u>S</u> tart - F12		

## Export Data

When the Owner Electronic Consent System Option is enabled, a new filter is available when exporting data for Owner and Owner Contacts for all output types.

- The filter will default to All
- When changing the filter to Yes, the results will only include owners who have consented to electronic

service of notices

• When changing the filter to No or Not Recorded, the results will only include owners who have not consented to electronic service of notices

## Effects on Inspection Planner

When the Electronic Consent System Option is enabled:

- There is no change to existing functionality if the owner has consented to the electronic service of notices
- If the owner has not consented to the electronic service of notices, a prompt will display when selecting the Email checkbox screen against the owner in Inspection Planner

# File Smart Integration

When using File Smart with Rest Professional Version 18.5, the owner's consent status will be synchronised with File Smart Printmail when the System Option Enforce Electronic Consent Status for Owner Email is enabled.

## Bulk Update Utility

The bulk update utility allows you to update the Owner Electronic Consent status of all your owners in one screen.

- To access the bulk update utility, browse to Other > Utilities > Global Changes and select the Bulk Status Update tab
- Click on Select Records under Electronic Consent and Bulk Update
- Select Update Owner Records and next
- The screen will display all owners and the grid can be filtered by Electronic Consent status
- All columns in the grid can be sorted by click on the column header
- Results in the grid can be updated in bulk before saving the changes to the file

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