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

Overview

A new option is available on the Tenant Details screen to indicate a tenant's preference on the electronic service of notices and other documents.

Legislation in Victoria and Queensland require a tenant's consent to receive notices electronically and this legislation will commence in New South Wales in December.

When the new System Option is enabled, tenants 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
- Tenant invoices and statements

This document will cover:

- Changes to existing screens in Rest Professional for System Options and Tenant Details
- Reporting on Tenant Electronic Consent
- Emailing Tenant Reports, Statements and Invoices
- Inspection Planner and Inspection Follow-up
- File Smart Integration
- Bulk Update Utility

Changes to Existing Screens in Rest Professional

System Options

A System Option has been added and when enabled, tenants 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 tenants, before enforcing the use of the option.

To enable Tenant 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 tenant email

4. You will receive a pop up message to advise you that tenant 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

| Transactions Statements Transactions Statement/Report Miscellaneous Descriptions Reminders Sales Other SMTP System Other Payments Mobile | |
|---|---|
| | |
| Miscellaneous Do not print properties on consolidated expenditure Include Unpresented report with Bank Rec report Include Trial Balance with Bank Rec report Include Trial Balance with Bank Rec report Use Sub-meter invoicing Display Tax Invoice confirm/edit message Pay settlement day to purchaser Pay settlement day to purchaser Print manager name on invoice Print manager name on invoice Exclude diary comments Calculate arrears to selected day Warn if duplicate PM disbursement is found in current and Inforce Electronic Consent status for tenant email Inforce Electronic Consent status for tenant email | |
| Disbursements Post all PM disbursements to outstanding Quick disbursements use manual cheque sequence Inspection fees Charge fees Account code 462 Inspection Fees | |
| Laser report margins (mm) Top 8 Left 8 Bottom 8 Right 8 Options for owner/tenant portal reports & emailing statements, remittances, work orders, quote requests Print header with company details Print company logo OK - F12 | ; |

Tenant Master File

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

Prerequisites:

- A valid email address must be saved before a tenant status can be changed to "Yes"
- The email address must match the tenant's nominated email address as per the tenants lease agreement

The Electronic Consent options are:

- Not Recorded (default)
- Yes
- No

| 🏂 Tenant Details | | - • • |
|--------------------|--|-----------------|
| Alpha index 🛛 🗛 | BAJ Active | |
| Lease name 🛛 Je | essica Alba | |
| General Renta | Bank Inspections Renegotiation Notes/Mail/Reminder Invoices Commercial | 1 |
| Property L(| DUISA16/7 7/16 Louisa Road BIRCHGROVE NSW 2041 | |
| | Go to property Mr Daniel Craig Mr Craig | Cancel - ESC |
| Contact | Go to owner Home:02 9555 0007 | |
| Name | Jessica Alba | Action - F1 |
| | Remove contact | |
| Salutation | Ms Alba 🗾 Total contacts: 1 | Clear - F2 |
| Date of Birth | | |
| Home | 02 9555 3846 Work | Delete - F3 |
| Fax | Mobile 0419 951 624 | _ |
| Email | j.alba@optusnet.com.au | Add Mode - F4 |
| Consented to | the electronic service of notices Not Recorded | |
| Primary C | ontact 🔽 Lease Contact 🖂 Not Recorded Repairs Contact | Status - F6 |
| Lease | No | |
| Short name Je | essica Alba Bond required \$1,400.00 | Search - F7 |
| Original lease dat | e 01/01/22 Vacating Bond no | l l |
| Lease start da | | Last Edits - F9 |
| Lease end dat | | \checkmark |
| Periodic lease da | te// | OK - F12 |

If the tenant has not been enabled to receive bulk invoices by email, you will receive a message to indicate this needs to be enabled. Press Yes and then tick the option in the invoices tab under Statement Control "Send bulk invoice/statement by Email and save

| S Tenant Details | - • • |
|---|-----------------|
| Alpha index ALBAJ Active | |
| Lease name Jessica Alba | |
| General Rental Bank Inspections Renegotiation Notes/Mail/Reminder Invoices Commercial | |
| Invoices outstanding Future Total Current 30 days 60 days 90+ days B/F Balance 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0 | |
| | |
| Date Owing Description Due Date Age MFee Pay To | Cancel - ESC |
| | Antion 51 |
| | Action - F1 |
| | |
| Total Invoice Credit | Clear - F2 |
| 200.00 Add water invoice Add new invoice Go to invoice | |
| | Delete - F3 |
| | 🕆 |
| | Add Mode - F4 |
| | 🜒 |
| Water Usage | Status - F6 |
| Allowance 0 Last Reading 0 Last Reading Date 30/12/99 | |
| Charge Tenant Water | Search - F7 |
| Statement Control Send bulk invoice/statement by Email Sent to Accounts Contact | l |
| Tenant Invoicing Note | Last Edits - F9 |
| | 0K - F12 |

You may also wish to change the option for additional tenant contacts within the tenant card.

Single Tenant Email

When the Electronic Consent System Option is enabled:

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

Reporting on Tenant Electronic Consent

Tenant Electronic Consent Report

A report is available to filter tenants who have consented or declined electronic communications and also tenants whose profiles have not been updated with this setting.

To access the Tenant Electronic Consent Report, go to:

• Reports > Tenant > Consent for Electronic Notices

| © Copyright 20 Rockend Train | essional (20.0.04) 122 - MRI Software LLC ing Centres AL ESTATE TRUST ACCT | | Da | te: 01/11/22 | Page: 001 |
|---------------------------------|---|----------------|------------------------------|---------------------|---|
| | TENANT CONSENT FOR | THE ELECTRONIC | SERVICE OF NOTICES | AND DOCUMEN | TS |
| Active Status: / | Active | | | From: 1 to: ZZZZZZZ | For May 2022 |
| | | | | - | onsent Status - All Contact Type - All R = Not Recorded |
| Tenant Alpha | Tenant Name Email Address | Property Alpha | Contact Name Contact Type | - | Contact Type - All R = Not Recorded |
| Tenant Alpha | | Property Alpha | | *N/ | Contact Type - All |

Emailing Tenant Reports, Statements and Invoices

Single reports

When the Tenant Electronic Consent System Option is enabled:

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

| 💩 Tenant Led | lger | | | | | | × |
|-------------------------------------|-------------------|------------------------------|--|---------------------|------------------------|--------------|-------------------|
| Selection All Range Select | Email to | Rest Professi | ional 'his tenant conta ervice of notices. | ented to the e | × | × | |
| | _ | | | E | ОК | Cancel | |
| Drientation F1 | Eont Select F2 | Printer <u>S</u> elect F3 | | b rint - F12 | Pre <u>v</u> iew - F11 | Export - F10 | X Cancel - ESC |

Tenant Statements and Invoices

When the Electronic Consent System Option is enabled, selecting the option to send email statements when generating a tenant statement or invoice will exclude tenants who have not consented to the electronic service of notices.

Bulk Email from Print Letters / Mail Merge & Export Data

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

- The filter will default to All
- When changing the filter to Yes, the results will only include tenants who have consented to electronic service of notices
- When changing the filter to No or Not Recorded, the results will only include tenants 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 Type of Letter Contact Manager Property Type | Tenant General Primary All All r by Area Code | Filter Email address Mobile number Electronic Service of Notices | All ~ All ~ All ~ All V Not Recorded Yes No | Ĩ |
| Selection Status O All Range | Active V Start at Alpha Index Finish at Alpha Index | ~ | Property order | |
| Output Mail Merge Email SMS ADL Forms Realworks | _ | ument Management Ipdate tenant history | Browse | Cancel - ESC Preview - F11 Start - F12 |

Export Data

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

- The filter will default to All
- When changing the filter to Yes, the results will only include tenants who have consented to electronic service of notices
- When changing the filter to No or Not Recorded, the results will only include tenants 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 tenant has consented to the electronic service of

notices

• If the tenant has not consented to the electronic service of notices, a prompt will display when

selecting the Email checkbox screen against the tenant in Inspection Planner

| - | | |
|---|------------------------------------|--------------|
| 🔀 Inspection Planner | | × |
| All inspections with the status of Send Notice or Reschedule in the previous step will display here. Inspections with no Frequency and Next Inspection Date cannot be scheduled. To edit details of inspections included here you must return to Schedule. | | 0 |
| When you have reviewed the details, select at least one communication method for each inspection. If you select the Invite Owner checkbox, the Notify Owner step will be available to set the communication methods for invited owners. | Next Inspection From 25/11/22 V To | 25/12/22 ~ |
| | Property Manager All | \sim |
| | Inspecting Agent All | \sim |
| | Class All | \sim |
| Schedule Notify Tenant Notify Owner Merge & Send Finalise | | Refresh |
| PM IA Property Alpha Property Address Suburb Inspection Planner X p | Tenant Name Letter Email SMS | Invite Owner |
| CK CK WHARF22 22 Wharf Road BIRCHGRO | Sheldon Cooper 🗹 🔲 | |
| This tenant has not consented to the electronic service of notices. | | |
| ОК | | |
| | | |
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File Smart Integration

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

Bulk Update Utility

The bulk update utility allows you to update the Tenant Electronic Consent status of all your tenants 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 Tenant Records and next
- The screen will display all tenants 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

25/11/2022 7:11 pm AEDT