

February Feature Roundup

for REST Professional & fileSMART

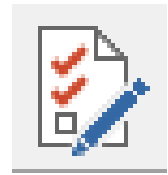


Additional Owner Contacts

- You can store more detailed information on your owner file by adding multiple owner contacts
- The new fields are available to use as merge fields so you can add even more personal details to your communications.
- View all the contacts for an ownership by clicking the additional contacts button
- Add as many Owner Contacts as required

Portfolio Check

- The Portfolio Check can be accessed from the toolbar by this icon
- You have the ability to access other users Portfolio Check



Additional Property Information

There is a new tab on the property file named Information. Here you will find:

- Water Usage information
- Pool information
- Smoke Alarm information
- Pet information

Business Alerts



- Flag yourself as a principal or director to receive the Business Alerts
- REST Professional will alert you when a Bank Reconciliation or System Backup hasn't been completed

REST Mobile



- Display new additional owner contact details
- Display Additional Tenancy Status information
- Portfolio check diary items for today and tomorrow
- Improved performance

Tenant Invoice - Disburse to Creditor



1. Create the tenants invoice and the creditor disbursement at the same time.
2. Link them
3. When the tenant pays the invoice amount, the funds automatically get allocated to the creditor disbursement

Smart Search

Smart Search can now search the mobile phone and email address fields across all master files



Rockend Knowledgebase



- The Rockend Knowledgebase is even easier to access!
- You can get there via the help menu or the help button.
- You don't even need to remember your username and password either!
- You will be logged straight in which means you will be able to get the information quicker than ever before

[Click here to view the REST Professional version 15 & fileSMART version 7.5 Upgrade tutorial](#)

Tenant Water Invoicing

- Identify and record which Properties and Tenants are liable for water charges
- You can charge the tenant both water usage and water supply on the one invoice and the amounts will be separated
- Set your defaults and the Tenant Water Invoices automatically populate with the information - saving you time & streamlining the process

Lokation Real Estate	
George Clooney 24 Gablemore Avenue BALMAIN EAST NSW 2041	Tenant Tax Invoice
Reporting: George Clooney 24 Gablemore Avenue BALMAIN EAST NSW 2041	Date: 09/02/17 Ref: CLOONEY
Description	Amount
Water Usage - Dec - Feb 2017	\$326.93
Water Reading Details	
Previous Reading Date : 30/12/09	Previous Reading : 0
Current Reading Date : 05/01/17	Current Reading : 123
	Units Used : 123
Water Supply	\$200.00
	Total Amount : \$526.93
	Due Date : 24/02/17

fileSMART Water Workflow

Use fileSMART to further streamline the whole water invoice processing in your office.

1

Use fileSMART **Owner & Tenant Water Invoicing** workflow to enter details of the water rates disbursement and the tenant invoice

2

Use fileSMART **PrintMail** to send the Water Rates notice to your Owners



3

Use fileSMART **PrintMail** to send a copy of the Water Rates notice and the Tenants Water Invoice to the tenant

Additional fileSMART Features

- **Re Workflow** - change the workflow of your documents without you having to delete them and start again.
- **Redacting** - electronically "white out" information on PrintMail documents
- Filter your documents by property **active or inactive status**
- **Duplicate documents** in your pending queue

[Click here to view the REST Professional version 14.5 & fileSMART version 7 upgrade tutorial](#)