Overview

This companion document for the webinar All About Letters and Notices explains how to create and edit letters, send notices to tenants and perform a mail merge using Microsoft Word.

Related Documents

To do a mail merge see Mail Merge Document.

Quick Links to Individual Topics

Letters – How to Create and Edit Letters and then Print or Publish Letters.

Notices – How to Create a Notice Profile, Assign Notice to Tenants, Set Notice Default for New Tenant Profiles, Understand Notice Date Criteria, and Run Notice Letters.

Letters

How to Create and Edit Letters

Use this function, under Mailings > Edit Letters, to create letters. Late notice letters and any other letters you may want to send to owners, tenants or vendor can be created and stored. The letters are printed through Mailings -- Notices, Owner Letters, Tenant Letters, or Vendor Letters. Late notice letters should always be printed from the Notices function. They are printed using font size 10. The mailing address is taken from the appropriate profile.

Return Address: Select from the Find List the return address format you want on the letter. It can be from the company profile, the management group profile, or not printed if using letterhead stock. You can also choose to use the Additional Letterhead Information entered in the company profile or management group profile. This note prints to the right of the return and mailing address information.

Do Not Print Return or Mailing Address: An X in this check box will prevent both the return address and the mailing address of the recipient from printing on the letter.

Letter Title: Whatever you enter in this field will print on the letter, centered, before the information entered in the letter body.

Substitutions: This box contains the text substitutions you can incorporate into the letter. Double click the substitution in this box and it will fill in the letter body at the position of the cursor. Text substitutions that begin with the word "letter" will use the field from the appropriate profile. For example, if you choose the text substitution letter.formal salutation, when you run letters from the Owner Letters function it will use the formal salutation from the Owner Profile, when you run letters from the Tenant Letters function it will use the formal salutation from the Tenant Profile.

*Text substitutions that begin with the word "notice" will only be filled in when the letter is run through Mailings, Notice Letters.

**Text substitutions that begin with the word "categories" refer to all the categories assigned to that particular Category tab in the profile. Those that begin with the word "category" refer to the specific category created under Setup, Categories.

Letter Body: Type the letter body in this section, including date and salutation if desired. Multiple page letters can be entered. Spell check is active in the letter body. Right click on the underlined word to view the list of optional spellings.

Under Mailings > Edit Letters you can pick an existing letter to edit or you can click new to start creating a new letter.

ID	Name
1 MASTER	Master merge letter
3 DAY	Three Day Notice
DL	Delinquent Letter

Here is an example of a letter. The substitutions used in this example include {Letter.Date} which will display as the actual date when the letter is run.

ID DL   Delinquent Letter

Return Address Management Group

Letter Title LATE NOTICE

☐ Do Not Print Return or Mailing Address

Substitutions
Categories.Comment
Categories.Emergency
Categories.General
Categories.Inspection
Categories.Listing
Categories.Maintenance
Categories.Welcome
Category.Automobile

Letter Body
{Letter.Date}

Dear {Tenant.Formal Salutation}:

Our records show that you owe {Notice.Balance Due} of which {Notice.Balance Late} is past due. Full payment of {Notice.Balance Late} must be received, together with the late charges, within 5 days from the date of this notice.

How to Print or Publish Letters

To Run Letters first decide who the letter is being sent to and then pick the appropriate path. The options include Owner, Tenant, Unit and Vendor. For example, a tenant letter would be run by going to Mailings > Tenant Letters. Select the letter and any criteria and click Run Letters.

Owner Letters

Letter	
Letter Date	8/30/2019
Restrict to	
Limit To Category	
Limit to Balance	$0.00

Unit Letters

Letter	
Letter Date	8/30/2019
Restrict to	
Limit To Category	

Tenant Letters

Letter	DL: Delinquent Letter	☒ Current Tenants
Letter Date	8/30/2019	☐ Future Tenants
		☐ Past Tenants
Restrict to		
Limit To Category		
Lease Expires	___ to ___	☒ Closed
Move In	___ to ___	☒ Month to Month
Move Out	___ to ___	☒ Open
Limit to Balance		$0.00

Vendor Letters

Letter		☒ Active
Letter Date	8/30/2019	☒ No Posting
		☐ Inactive
Restrict to		
Limit To Category		
Workman's Comp	to	
Liability Insurance	to	

Once compiled a list of letters will appear. Before running the letters, the list can be reviewed, and candidates can be skipped if needed. Once ready, click Run Letters to Preview the letters and either Print or Publish the letters.

Word Document

Mail Merge Action: Edit Document   Execute Mail Merge   Select Document

Buttons	Date	Addressee	Letter	
Profile Search	8/30/2019	BRUNO: Joseph P. Bruno	DL: Delinquent Letter	☐ Skip
Dashboard	8/30/2019	ROD: Jerry and Karyl Rodriguez	DL: Delinquent Letter	☐ Skip
Internet Publishing	8/30/2019	GURO: Edward & Marianne Guro	DL: Delinquent Letter	☐ Skip
Profiles	8/30/2019	SPOTZ: Robert Spotz	DL: Delinquent Letter	☐ Skip
AP	8/30/2019	PARSONS: Johnny Parsons	DL: Delinquent Letter	☐ Skip
AR	8/30/2019	SCHRADER: Phyllis Schrader	DL: Delinquent Letter	☐ Skip
GL	8/30/2019	STIEFFEL: Thomas J. Stieffel	DL: Delinquent Letter	☐ Skip
Maintenance	8/30/2019	ROSEMAN: Rita Roseman	DL: Delinquent Letter	☐ Skip
Reports	8/30/2019	ROSEMAN2: Rita Roseman	DL: Delinquent Letter	☐ Skip
Mailings				

Help   Run Letters   Report   Skip All   Cancel

All Letters / Selected Letters / Skipped Letters

PROMAS Demonstration Package
311D Maple Avenue West
Vienna, VA 22180

Joseph P. Bruno
436 Fairway Drive
Vienna, VA 22180

LATE NOTICE

Friday August 30, 2019

Dear Joseph P. Bruno:

Our records show that you owe of which is past due. Full payment of must be received, together with the late charges, within 5 days from the date of this notice.

In the event payment is not received your account will be turned over to the attorney for legal action, which will incur additional costs including, but not limited to, interest, legal fees, and late charges. Once the account is turned over to the attorney, we will no longer be involved. Questions and payment should then be directed to the attorney's office.

In closing, be reminded that your next rent payment is expected in a timely manner. We trust that all payments, as herein specified, will be promptly received to avoid legal action.

Sincerely,

Emma Bull
Property Manager

The PROMAS Landlord Software Center • 703-255-1400 • www.promas.com

Notice Overview

All letters are created in the Mailings > Edit Letters function. See the last 2 pages for information on creating the Notice letter. The Notice letters are run from Mailings > Notices.

Late notice letters are compiled using information in the *Notice profile* which sets up a notice letter to use based on the number of days late. Each tenant must be assigned a Notice Profile in their *Tenant Profile*. They also use the grace period information in the Late Fee profile.

Create and Edit Notice Profile

To create or edit a notice profile, go to Setup > Notices. Here will be a list of any existing notices. To add a new profile, click New and to edit an existing profile, highlight selection and click Edit. Each profile can have up to four different late notice letters, each with its own number of days late. The letter bodies are defined in Mailings > Edit Letters. When notice letters are run from the Mailings > Notices function, the system will choose the notice letter to use based on the number of days late for each notice candidate. The letter type can be changed prior to printing.

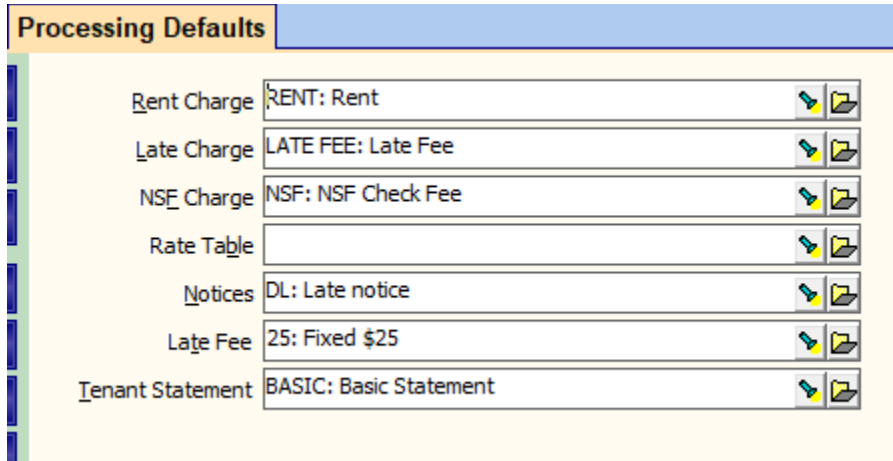| Late notice [Notice]			
ID DL	Late notice		
Notice Letters			
1st Notice	DL: Delinquent Letter	Days Late	1
2nd Notice	3 DAY: Three Day Notice	Days Late	3
3rd Notice	LAST CHANCE: Last Chance Notice	Days Late	5
4th Notice	LAST CHANCE: Last Chance Notice	Days Late	10

Assign Notice to Tenants

After creating the notice under setup, notice profiles are assigned to tenants under Profiles > Tenant > Highlight and Edit Tenant > Tab 2 Lease (at bottom) > Notice. Since notices are assigned at the tenant level, this means different tenants can have different letters sent and/or at different days late intervals. An example of when different notices might be required would be if new units and tenants are taken over from another management group and tenants have already signed a lease with different dates than what your current tenants are set to.

Rate Table	ARLTN: Arlington County		
Notices	DL: Late notice		
Late Fees	25: Fixed $25		
Grace Period	5	Additional Management Fee (%)	

Set Notice Default for New Tenant Profiles

To have Promas automatically fill in a default Notice Profile when creating new Tenants, go to Setup > Processing Defaults > Tab 2 Tenant Profiles (at bottom) > Notices. Select a default notice profile here and when a new tenant is added, this will be the default. This will not affect existing tenants.
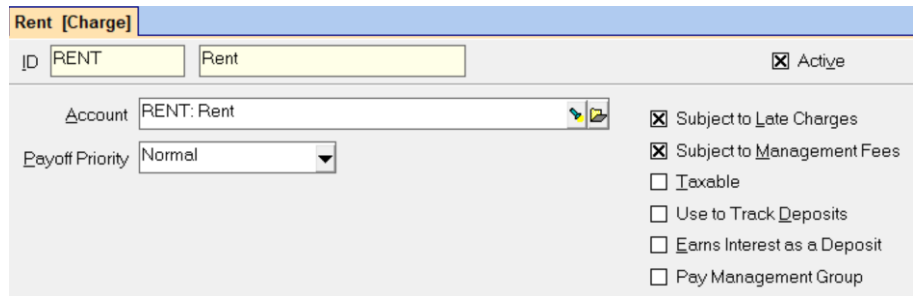

Understand Notice Date Criteria

The system ignores the scheduling rules set up in the *Late Fee profile* when determining candidates for late notice letters so that notices can be sent to tenants who have already been charged a late fee. It will also consider all charges even if the Balance Late field contains a different selection. See the Late Fee Document for information on the Late Fee Profile and charging late fees.

Only charges with the "Subject to Late Fees" checkbox marked are considered when the notice candidates are determined. A Late Fee profile must be assigned to the tenant.

The first consideration in determining notice candidates is the grace period set up in the *Late Fee profile* and in the *Tenant Profile*. If the grace period has passed, the system uses the Days Late fields in the Notice profile. If the number of days late (beyond the grace period) is less than or equal to the Days Late in the Notice profile, that tenant will be a notice candidate and will be assigned the appropriate notice letter per the Notice profile.

Late Fee Profile

Skip if Late Before
Potential notice letter candidates will be skipped if they became late prior to the date entered here.

Run Notice Letters

Once you compile a screen will display with the notice candidates and the letter they will receive.

From this screen you can:
- Review the candidates and skip any you don't want to create a late notice for.
- Click on a line to see more information about the tenant.
- Click on Report to get a report of the candidates.

- You can follow the Mail Merge procedure to export the information to Word (see Mail Merge Document).
- Click on Run Notices to preview the Notice Letters.

PROMAS Demonstration Package
311D Maple Avenue West
Vienna, VA 22180

Phyllis Schrader
206 Center Street North
Unit 203
Vienna, VA 22181

LATE NOTICE

Thursday June 7, 2018

Dear Phyllis Schrader:

Our records show that you owe $1,150.00 of which $1,150.00 is past due. Full payment of $1,150.00 must be received, together with the late charges, within 5 days from the date of this notice.

In the event payment is not received your account will be turned over to the attorney for legal action, which will incur additional costs including, but not limited to, interest, legal fees, and late charges. Once the account is turned over to the attorney, we will no longer be involved. Questions and payment should then be directed to the attorney's office.

In closing, be reminded that your next rent payment is expected in a timely manner. We trust that all payments, as herein specified, will be promptly received to avoid legal action.

Sincerely,

Emma Bull
Property Manager

Examples of Notice Letter dates:

Based on the information in Tenant A's profile
- grace period is 5 days (from Late Fee and Tenant profiles)
- letter 1 - 1 day late (Notice profile)
- letter 2 - 10 days late (Notice profile)

Based on the information in Tenant B's profile
- grace period is 10 days (from Late Fee and Tenant profiles)
- letter 1 - 1 day late (Notice profile)
- letter 3 - 5 days late (Notice profile)

Rent is charged on 3/1. The first day rent is late for Tenant A is 3/7. The first day rent is late for Tenant B is 3/12.

In Mailings, Notices

Notice date is set to 3/7.
- Tenant A will get letter 1.
- Tenant B will not be a notice candidate.

Notice date is set to 3/12.
- Tenant A will get letter 1.
- Tenant B will get letter 1.

Notice date is set to 3/17.
- Tenant A will get letter 2.
- Tenant B will get letter 3.