

## Overview

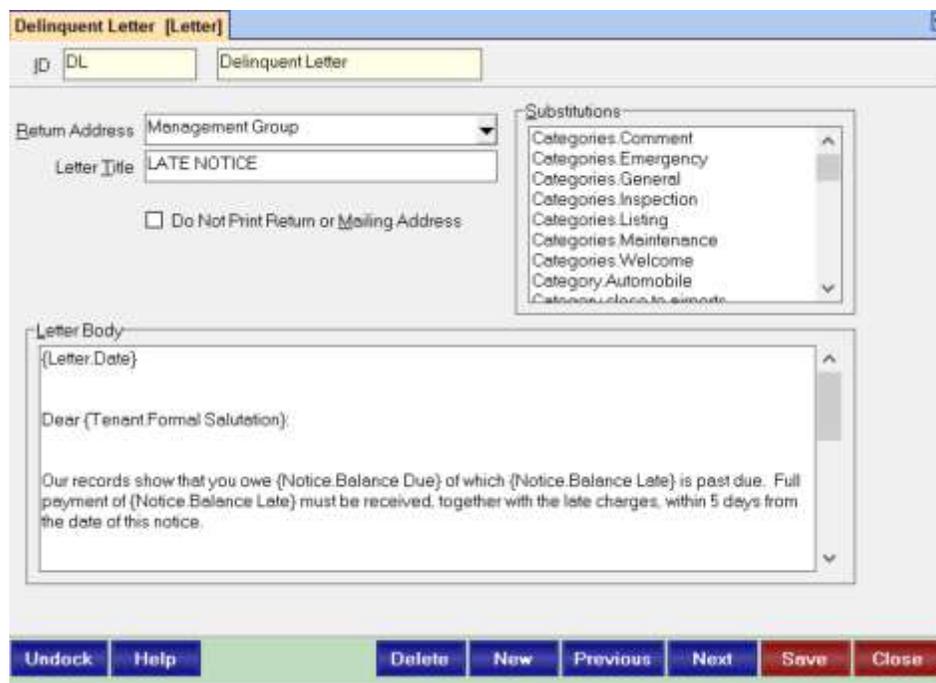
Use <<Mailings, Edit Letters>>, to create letters. Late notice letters and any other letters you may want to send to owners, tenants or vendor can be created and stored.

The letters are printed through Mailings -- Notices, Owner Letters, Tenant Letters, Vendor Letters or Unit Letters. Late notice letters should always be printed from the Notices function. For specifics on notices see [Help Document R-385](#) Late Notice Letters.

They are printed using font size 10. If you want to use a Mail Merge to export fields to Microsoft Word or Open Office, where more formatting options are available, click here for the mail merge [Help Document R-291](#) Mail Merge.

To delete a letter edit the letter and click the Delete button.

## Create Letters



The screenshot shows a software window titled "Delinquent Letter [Letter]". It contains several input fields and a list. The "ID" field is "DL" and the "Return Address" dropdown is "Management Group". The "Letter Title" is "LATE NOTICE". There is a checkbox labeled "Do Not Print Return or Mailing Address" which is unchecked. To the right is a "Substitutions" list with items like "Categories.Comment", "Categories.Emergency", "Categories.General", "Categories.Inspection", "Categories.Listing", "Categories.Maintenance", "Categories.Welcome", and "Category.Automobile". Below this is a "Letter Body" text area containing a template letter with fields like {Letter.Date}, {Tenant.Formal.Salutation}, {Notice.Balance.Due}, and {Notice.Balance.Late}. At the bottom of the window are buttons: "Undock", "Help", "Delete", "New", "Previous", "Next", "Save", and "Close".

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

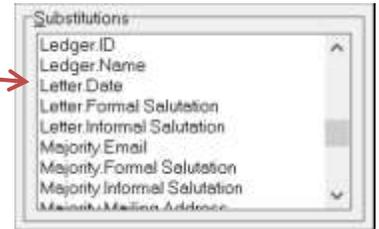
Whatever you enter in this field will print on the letter, centered, before the information entered in the letter body.

## 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.

## **Print Letters – Owners, Tenant, Vendors**

Use this function to print letters to owners/tenants/vendors/units. The letters themselves are created in the Edit Letters function.

### **Letter**

Select the letter you wish to use from the Find List.

### **Letter Date**

Enter the date you wish to use in the body of the letter as a text substitution.

### **Restrict to**

- The owner letters can be limited to a specific owner, property, property manager, or management group.
- Tenant letters can be limited to owners, tenants, property, property manager, management group.
- Vendor letters can be limited to vendors.
- Unit letters can be limited to unit, owner, property, property manager, or management group.
- **NOTE:** To create a letter to an owner using unit and tenant substitutions, use the Unit letter function. The owner substitutions are on the list preceded by the word "Majority".

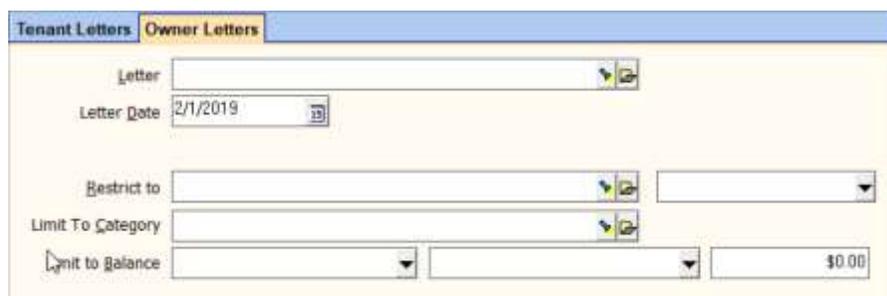
### **Limit to Category**

The letter can be limited to those owners and partnerships in the category selected here. Use the Find List to select the category you want to use.

### **Limit to Balance**

There is now the ability to restrict letters based on balances. For Owner Letters the balance can be restricted to Balance, Base Surplus, and Distribution Surplus. For Tenant Letters the balance can be restricted to Advances, Balance, Deposits, Open Credits, and Unpaid Charges. The limiting options are Equal To, Greater Than, Greater Than or Equal To, Less Than, Less Than or Equal To, and Not Equal To. One or two restrictions can be used with either an AND or OR statement type.

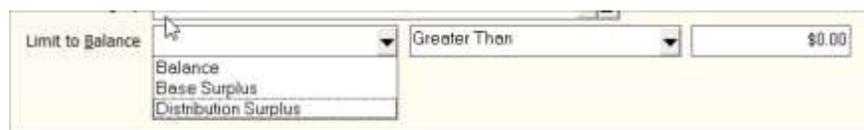
## **Owner Letters**



The screenshot shows the 'Owner Letters' form with the following fields:

- Letter:** A dropdown menu with a search icon.
- Letter Date:** A text input field containing '2/1/2019' and a calendar icon.
- Restrict to:** A dropdown menu with a search icon and a secondary dropdown menu.
- Limit To Category:** A dropdown menu with a search icon.
- Limit to Balance:** A dropdown menu, a second dropdown menu, and a text input field containing '\$0.00'.

### **Limit to Balance**



This close-up shows the 'Limit to Balance' dropdown menu open, displaying the following options:

- Balance
- Base Surplus
- Distribution Surplus

The dropdown is currently set to 'Greater Than' and the value '\$0.00' is entered in the adjacent text field.

You can limit an owner letter to partnerships or owners with:

<u>Field 1</u>	<u>Field 2</u>	<u>Amount</u>
Balance	Equal to	any dollar amount
Base Surplus	Not equal to	any amount
Distribution Surplus	Less than	
	Less than or equal to	
	Greater than	
	Greater than or equal to	

Use the Find List box to select your choice. If left blank the owner's balance will not be used to determine whether to include him on the report.

For example, if a letter is to be sent to owners with a balance less than \$500 but more than \$100, the criteria would look like this:

A screenshot of a search criteria form. It features two rows of criteria. The first row has a dropdown menu set to 'Balance', a comparison operator dropdown set to 'Less Than', and a text input field containing '\$500.00'. The second row has a comparison operator dropdown set to 'Greater Than' and a text input field containing '\$100.00'. Between the two rows, there are radio buttons for 'AND' (which is selected) and 'OR'.

## Tenant Letters

A screenshot of the 'Tenant Letters' configuration window. It includes several input fields: 'Letter' (with a Find List icon), 'Letter Date' (set to 6/30/2021), 'Restrict to' (with a Find List icon), 'Limit To Category' (with a Find List icon), 'Lease Expires' (with date pickers), 'Move In' (with date pickers), and 'Move Out' (with date pickers). On the right side, there are two groups of checkboxes: the first group includes 'Current Tenants' (checked), 'Future Tenants' (unchecked), and 'Past Tenants' (unchecked); the second group includes 'Closed' (checked), 'Month to Month' (checked), and 'Open' (checked). At the bottom, there are two rows of criteria with dropdown menus and text input fields (both set to '\$0.00'), and radio buttons for 'AND' (selected) and 'OR'.

### Lease Expires

The letter can be limited to those tenants whose lease expiration (in Tenant Profile) fall within the range of dates entered here.

### Move In

The letter can be limited to those tenants whose move in dates (in Tenant Profile) fall within the range of dates entered here.

### Move Out

The letter can be limited to those tenants whose move out dates (in Tenant Profile) fall within the range of dates entered here.

### Status

The letter can be limited to those tenants with a specific status: Current, Future or Past.

## Limit to Balance

Using the three fields you can create any combination of the following:

<u>Field 1</u>	<u>Field 2</u>	<u>Amount</u>
Balance	Equal to	any dollar amount
Unpaid Charges	Not equal to	any amount
Advances	Less than	
Open Credits	Less than or equal to	
Deposits	Greater than	
	Greater than or equal to	

Limit to Balance: [Open Credits] Greater Than or Equal To: [ \$10.00 ]

For example, if a tenant letter were to go to tenants with Open Credits greater than or equal to \$10 or less than \$0, the criteria would look like this:

Limit to Balance: [Open Credits] Greater Than or Equal To: [ \$10.00 ]  
 AND  OR [Less Than] [ \$0.00 ]

If a tenant letter were to go to tenants with a balance greater than or equal to \$25, the criteria would look like this (the second line would not be used):

Limit to Balance: [Balance] Greater Than or Equal To: [ \$25.00 ]  
 AND  OR [ ] [ \$0.00 ]

Once you have the parameters set you can compile.



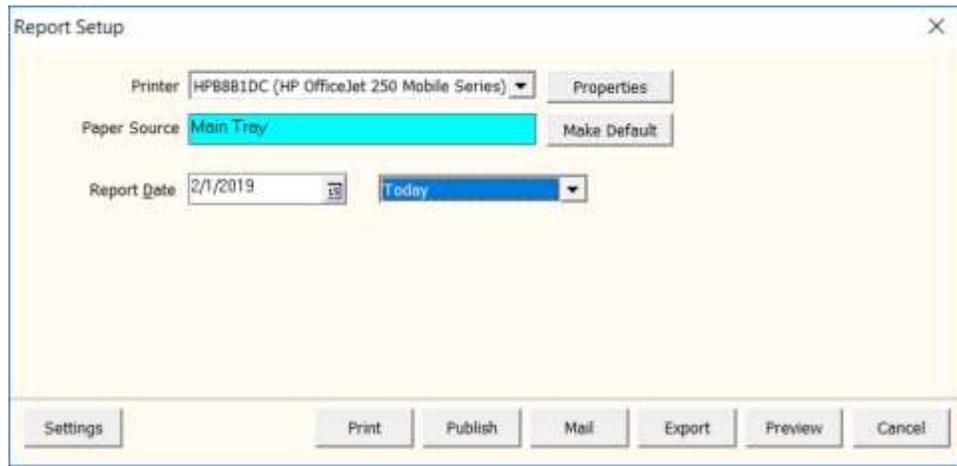
From the Letters screen you can skip any letters you don't want to create. Clicking on the name will show you the letter that will be generated for that owner/tenant/vendor. To print mail labels for the selected candidates click Mail Labels.

You can print a report of the letters by clicking the Report button.

**Letters**  
February 1, 2019

Posting Date	Recipient	Letter	Skipped
2/1/2019	BRUNO: Joseph F. Bruno	DL: Delinquent Letter	
2/1/2019	GURO: Edward & Marianne Guro	DL: Delinquent Letter	
2/1/2019	PARSONS: Johnny Parsons	DL: Delinquent Letter	Yes
2/1/2019	ROD: Jerry and Karyl Rodriguez	DL: Delinquent Letter	
2/1/2019	ROSEMAN: Rita Roseman	DL: Delinquent Letter	
2/1/2019	SCHRADER: Phyllis Schrader	DL: Delinquent Letter	Yes
2/1/2019	SPOTZ: Robert Spotz	DL: Delinquent Letter	Yes
2/1/2019	STIEFFEL: Thomas J. Stieffel	DL: Delinquent Letter	Yes

Click Compile to bring up the screen showing all the candidates you have selected. Click Run Letters to generate the letters. The Report Setup screen will display, where you can select the printer and choose to Preview, Print or Publish the letters.



Click the <Settings> button to change the parameters:

Paper Type

- Plain Paper
- Letterhead (2 inches will be left at the top of each page so you can print on letterhead paper)

Theme

- Modern Color – heading and labels are in color with alternate lines shaded.
- Modern – black heading and labels with alternate lines shaded.
- Classic – black with no shading

Publishing Header –

- Default - will eliminate the return address on each letter.
- Mail – will include the return address on each letter.

The letters will be printed or published or previewed on the screen.

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

This is a good place to put  
Contact Information  
Phone numbers, Email addresses.  
It goes on statements.  
Whatever is here is centered in the statement block

Joseph P. Bruno  
436 Fairway Drive  
Vienna, VA 22180

## LATE NOTICE

Friday February 1, 2019

Dear Joseph P. Bruno:

Our records show that you owe \$1,040.00. Full payment of \$1,040.00 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