

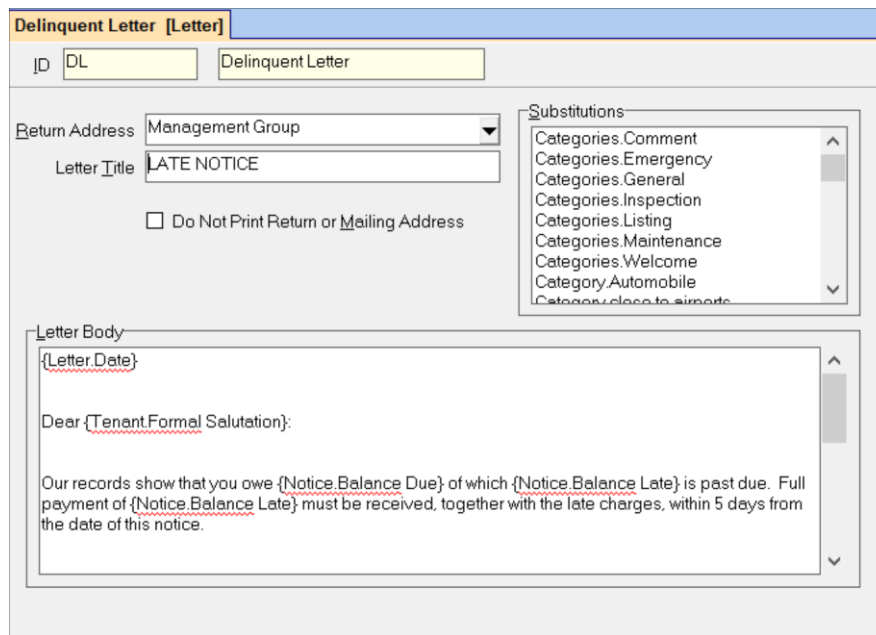
Overview

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.

Create Letters



Delinquent Letter [Letter]

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
- Category.close to airports

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.

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

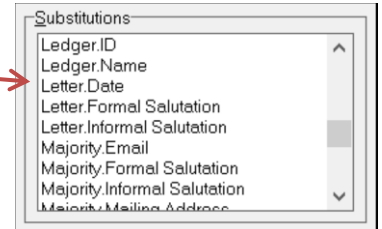
Whatever you enter in this field will print on the letter, centered, before the information entered in the letter body.

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.

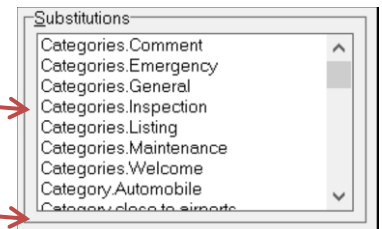
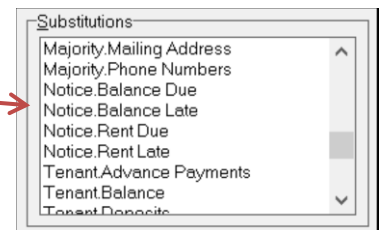
Text substitutions that begin with the word "letter" will use the field from the appropriate profile.

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".

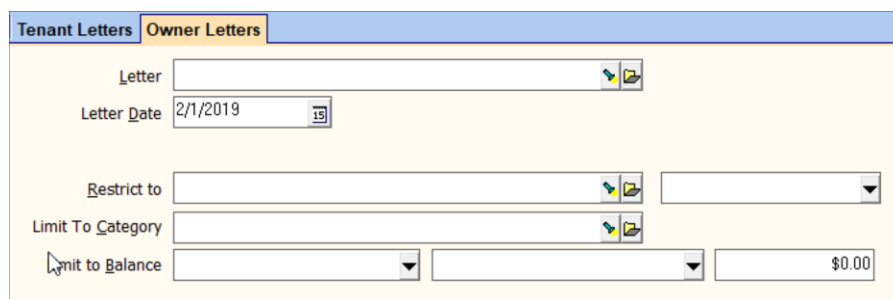
Limit to Category

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

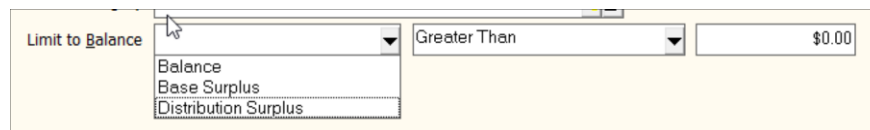
There is now the ability to restrict letters based on balances. For Owner Letters the balance can be restricted to Balance, Base Surplus, and Distribution Surplus. For Tenant Letters the balance can be restricted to Advances, Balance, Deposits, Open Credits, and Unpaid Charges. The limiting options are 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' configuration window. It has a title bar with 'Tenant Letters' and 'Owner Letters' tabs. The 'Owner Letters' tab is active. The window contains several fields: 'Letter' (text input), 'Letter Date' (date input with '2/1/2019' and a year selector '19'), 'Restrict to' (text input), 'Limit To Category' (text input), and 'Limit to Balance' (a dropdown menu, a comparison operator dropdown, and a value input field with '\$0.00').

Limit to Balance



This is a close-up of the 'Limit to Balance' dropdown menu. The dropdown is open, showing three options: 'Balance', 'Base Surplus', and 'Distribution Surplus'. The 'Limit to Balance' label is on the left, and the dropdown arrow is on the right. To the right of the dropdown is a comparison operator dropdown set to 'Greater Than' and a value input field with '\$0.00'.

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:

Limit to Balance	Balance	Less Than	\$500.00
		Greater Than	\$100.00
	<input checked="" type="radio"/> AND <input type="radio"/> OR		

Tenant Letters

Tenant Letters	
Letter	<input type="text"/>
Letter Date	6/30/2021
Restrict to	<input type="text"/>
Limit To Category	<input type="text"/>
Lease Expires	<input type="text"/> to <input type="text"/>
Move In	<input type="text"/> to <input type="text"/>
Move Out	<input type="text"/> to <input type="text"/>
Limit to Balance	<input type="text"/> <input type="text"/> \$0.00
	<input checked="" type="radio"/> AND <input type="radio"/> OR <input type="text"/> <input type="text"/> \$0.00
	<input checked="" type="checkbox"/> Current Tenants <input type="checkbox"/> Future Tenants <input type="checkbox"/> Past Tenants
	<input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Month to Month <input checked="" type="checkbox"/> Open

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	

The screenshot shows the 'Limit to Balance' form. The 'Field 1' dropdown menu is open, displaying a list of options: Advances, Balance, Deposits, Open Credits, and Unpaid Charges. The 'Field 2' dropdown is set to 'Greater Than or Equal To' and the 'Amount' field contains '\$0.00'.

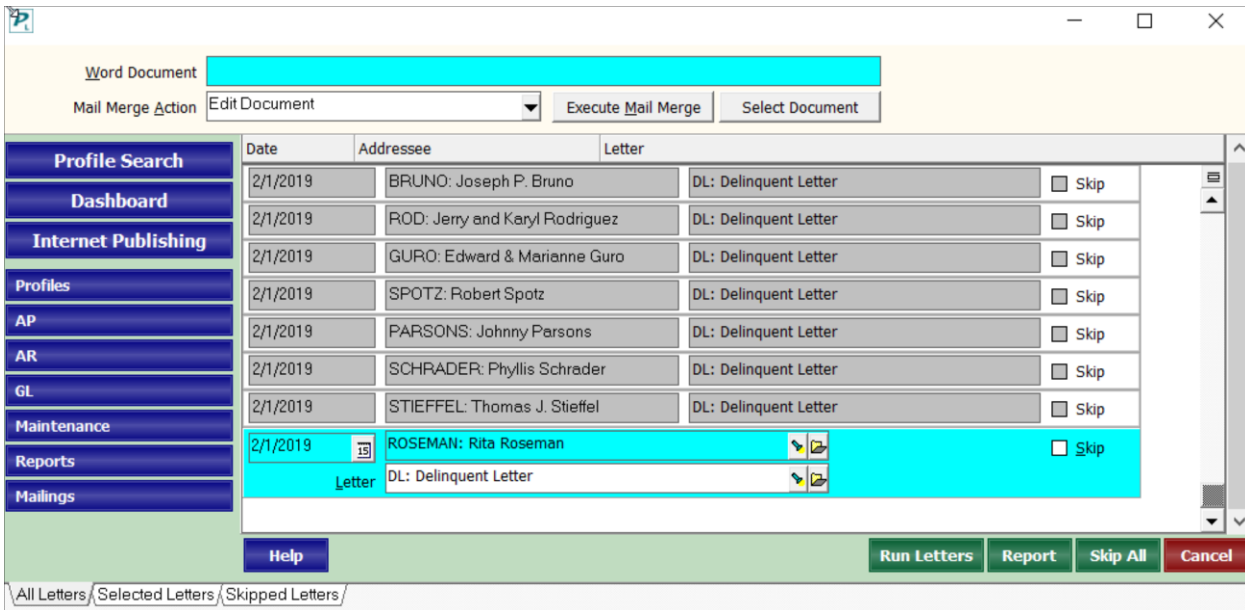
For example, if a tenant letter were to go to tenants with Open Credits greater than or equal to \$10 or less than \$0, the criteria would look like this:

The screenshot shows the 'Limit to Balance' form with two criteria. The first criterion is 'Open Credits' greater than or equal to '\$10.00'. The second criterion is 'Less Than' '\$0.00'. The 'AND/OR' radio buttons are set to 'OR'.

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):

The screenshot shows the 'Limit to Balance' form with a single criterion: 'Balance' greater than or equal to '\$25.00'. The second criterion field is empty, and the 'AND/OR' radio buttons are set to 'OR'.

Once you have the parameters set you can compile.



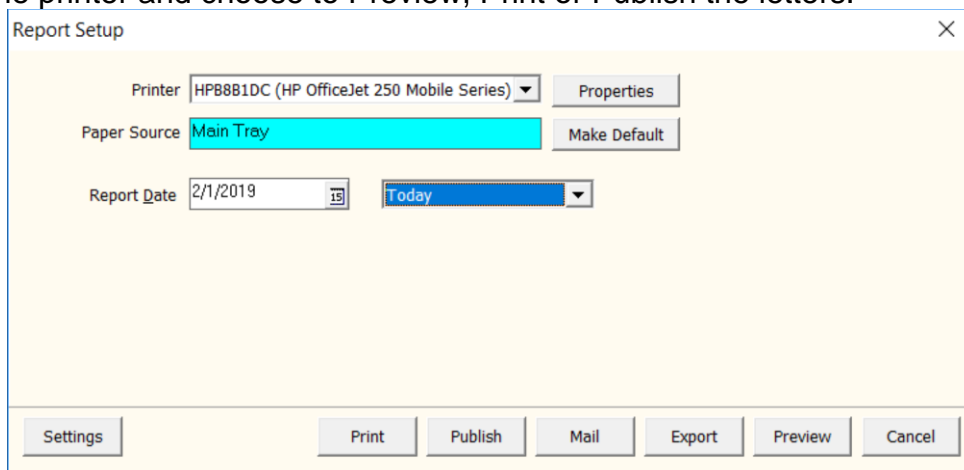
From the Letters screen you can skip any letters you don't want to create. Clicking on the name will show you the letter that will be generated for that owner/tenant/vendor.

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

The screenshot shows a report titled "Letters" for "February 1, 2019". The report is a table with columns for "Posting Date", "Recipient", "Letter", and "Skipped". The "Skipped" column contains "Yes" for some entries and is empty for others.

Posting Date	Recipient	Letter	Skipped
2/1/2019	BRUNO: Joseph P. 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 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.

<p>PROMAS Demonstration Package 311D Maple Avenue West Vienna, VA 22180</p>	<p>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</p>
<p>Joseph P. Bruno 436 Fairway Drive Vienna, VA 22180</p>	
<p style="text-align: center;">LATE NOTICE</p>	
<p>Friday February 1, 2019</p>	
<p>Dear Joseph P. Bruno:</p>	
<p>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.</p>	
<p>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.</p>	
<p>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.</p>	
<p>Sincerely,</p>	
<p>Emma Bull Property Manager</p>	