

RESIDENTIAL CORRESPONDENCE CREATION

Residential Correspondence Steps:

1. Define Report Name
2. Download Merge Token File
3. Create Template
4. Upload Template
5. Configure Correspondence at System Level
6. Generate Letters

Step 1: Define Report Name

To Define Report Name

From your Admin Role, select “Admin ~ Correspondence Configuration ~ Correspondence Report Name”

The “Correspondence Report Name” screen will appear.

1. Select the Object Type: Tenant-Resident
2. Select a Category:

Note: The category you select will determine which merge fields are available for the correspondence document and which filter fields are available when you generate the letters.

3. Create a Report Name

Note: You may have several different report names for one category. The template is created in a later step, then linked to the report name created here. This is the report name that will show up in the drop box when you go to generate reports.

4. Click “Save”.

Step 2: Download Merge Token File

To Download the Merge Token File

From your Admin Role, select “Admin ~ Correspondence Configuration ~ Correspondence Document Manager”

The “Correspondence Document Manager” screen will appear.

1. Select the Object Type (Tenant-Resident)
2. Select the Category (Resident Statement)
3. Select the Appropriate Report Name
4. Select the Download Merge Tokens button (the File Download box appears)
5. Save the file to your local system and note the location. This file will be the data source for the Word Merge Template.

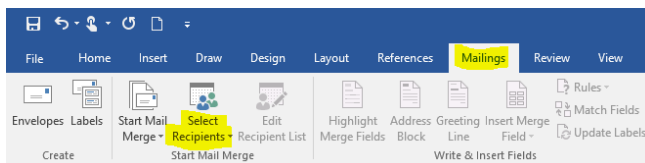
Correspondence Document Manager			
Object Type	Tenant-Resident	▼	Download Merge Tokens
Category	Resident Statement	▼	Download Template Add-in
Report Name	New Management	▼	Help

Step 3: Create Template

Create/Open the Word Document you want to use.

With the document open in Microsoft Word,

1. Select Mailings~Select Recipients~Use Existing List

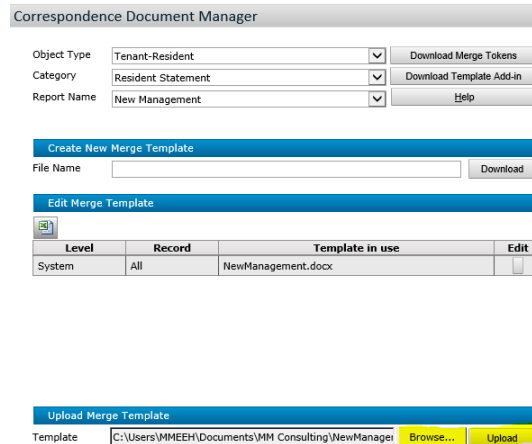


2. Navigate to the token file you saved in Step 2.
3. To Insert Merge Fields, place your cursor where you want to insert the merge field, then choose “Insert Merge Field”, choose the field you wish to insert, click enter.
4. Save your document.

Step 4: Upload Merge Template

From your Admin Role, select Admin~Correspondence Configuration ~Correspondence Document Manager.

1. Click “Browse” in the Upload Merge Template section and browse to the Word document. Select “Upload”.



The screenshot shows the 'Correspondence Document Manager' interface. It includes filters for Object Type (Tenant-Resident), Category (Resident Statement), and Report Name (New Management). Below these are buttons for 'Download Merge Tokens', 'Download Template Add-In', and 'Help'. There are sections for 'Create New Merge Template' (with a File Name input and Download button) and 'Edit Merge Template'. A table lists existing templates:

Level	Record	Template in use	Edit
System	All	NewManagement.docx	<input type="checkbox"/>

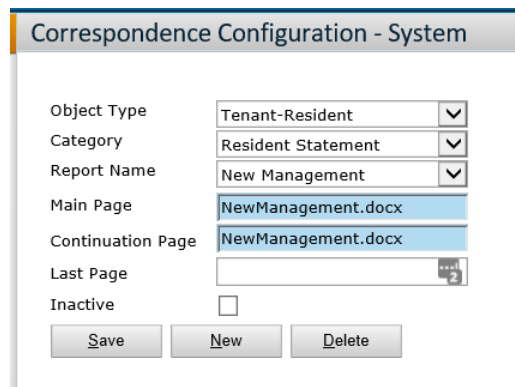
Below the table is the 'Upload Merge Template' section, which shows the file path 'C:\Users\MMEEH\Documents\MM Consulting\NewManager' and buttons for 'Browse...' and 'Upload'.

This will upload your document to the Reports Directory.

Step 5: Configure Correspondence at System Level

From your Admin Role, select Admin~Correspondence Configuration~Correspondence Configuration System

1. Set Object Type and Category on Filter, then click “Submit”.
2. On “Correspondence Configuration – System” Screen, fill in the Report Name you assigned in Step 1 and the Name of your Word document in the Main Page and Continuation Page fields. Click “Save”



The screenshot shows the 'Correspondence Configuration - System' interface. It includes filters for Object Type (Tenant-Resident), Category (Resident Statement), and Report Name (New Management). Below these are fields for Main Page (NewManagement.docx) and Continuation Page (NewManagement.docx). There is an Inactive checkbox and buttons for 'Save', 'New', and 'Delete'.



Step 6: Generate Letters

From your Residential Manager role, select Reports~Resident~Residential Correspondence

1. Resident Filter Section: Complete the Resident Filter to select the residents.
2. Create/Email Documents Section: Choose Category and Report Type.
3. Click "Display" to see the list of residents it will generate letters for.
4. Click "Generate Documents" to generate the documents.
 - a. Click off "Attach Documents" to attach a copy of the letter to the resident record.
 - b. Click "Merge Documents In Single PDF" if you wish to create one single PDF with all the letters to make printing easier.
5. Once you "Generate Documents", the "Email Documents" will become available. You can click "Email Documents" to have Yardi email the documents. *(Note: It sends the emails as soon as you click the "Email Documents" button; it does not give you a second chance to change your mind.)*

The screenshot shows the 'Residential Correspondence' interface. It is divided into two main sections: 'Resident Filter' and 'Create/ Email Documents'.

Resident Filter Section:

- Property: [Text Input]
- Unit Type: [Text Input]
- Unit: [Text Input]
- Resident: [Text Input]
- Having Charges: [Text Input]
- Post Month: [Text Input] to [Text Input]
- Trans From Date: [Calendar] to [Calendar]
- Move In: [Calendar] to [Calendar]
- Move Out: [Calendar] to [Calendar]
- Lease From Date: [Calendar] to [Calendar]
- Lease To: [Calendar] to [Calendar]
- Document Date: [Calendar]
- Amount Owed: [Text Input] to [Text Input]
- Status: [Dropdown: Current, Past, Future]

Create/ Email Documents Section:

- Category: [Dropdown: Resident Statement]
- Report Type: [Dropdown: New Management]
- Print Blank:
- Display Charge Codes: [Text Input]
- Lease Charges Month: [Text Input]
- Include All Lease Holders:
- Roommate Type: [Dropdown: Roommate, Spouse, Guarantor]
- Generate Documents** (highlighted button)
- Attach Documents: (highlighted)
- Show on Portal:
- Merge Documents In Single PDF: (highlighted)
- Mark Documents as "Copy":
- Publish to Sharepoint:
- Best Value Proposal Only:
- Email Documents (button)
- Resend Documents (button)
- Documents with No Email Id (button)

At the bottom of the filter section, there are buttons for 'Display' (highlighted), 'PDF', 'Excel', and 'Clear'.



To Edit Correspondence Docs:

To retrieve the existing document from Yardi:

From your Admin Role, select “Admin~Correspondence Configuration~Correspondence Document Manager”

1. Click on the “Edit” button in the Edit Merge Template section.

Correspondence Document Manager

Object Type:

Category:

Report Name:

Create New Merge Template

File Name:

Edit Merge Template

Level	Record	Template in use	Edit
System	All	NewManagement.docx	<input type="button" value="Edit"/>

2. This will open up the Word document. Save document to your computer and update as necessary.
3. From the Upload Merge Template section of Correspondence Document Manager,
 - a. Click “Choose File” to navigate to your updated file.
 - b. Click “Upload” to re-upload the file you just updated.

Correspondence Document Manager

Object Type:

Category:

Report Name:

Create New Merge Template

File Name:

Edit Merge Template

Level	Record	Template in use	Edit
System	All	NewManagement.docx	<input type="button" value="Edit"/>

Upload Merge Template

Template: NewManagement.docx

Note: Each client is unique. Please contact MM Consulting Solutions if you would like to develop a custom solution for your business.