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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".

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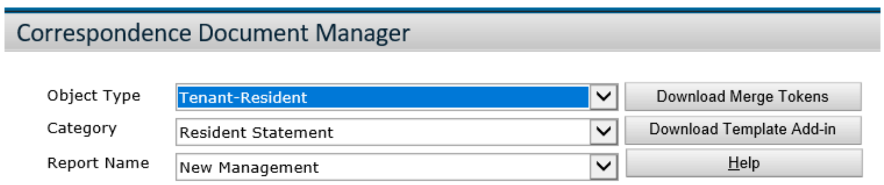
Step 2: Download Merge Token File

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.

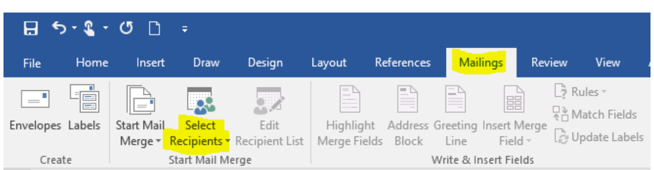


Step 3: Create Template

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.

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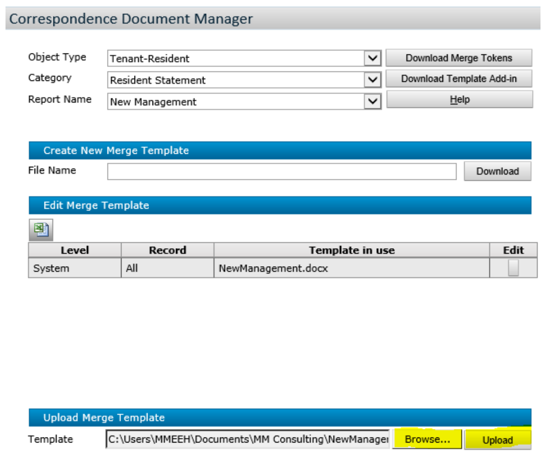
Step 4: Upload Merge Template

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”.

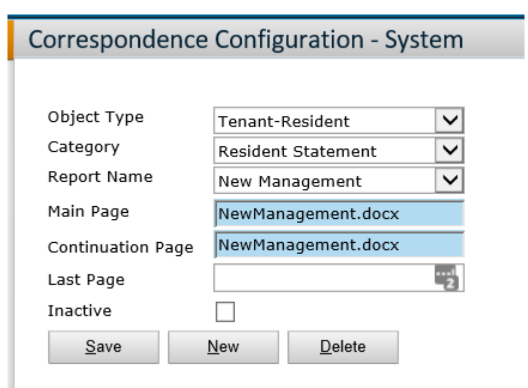


This will upload your document to the Reports Directory.

Step 5: Configure Correspondence at System Level

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

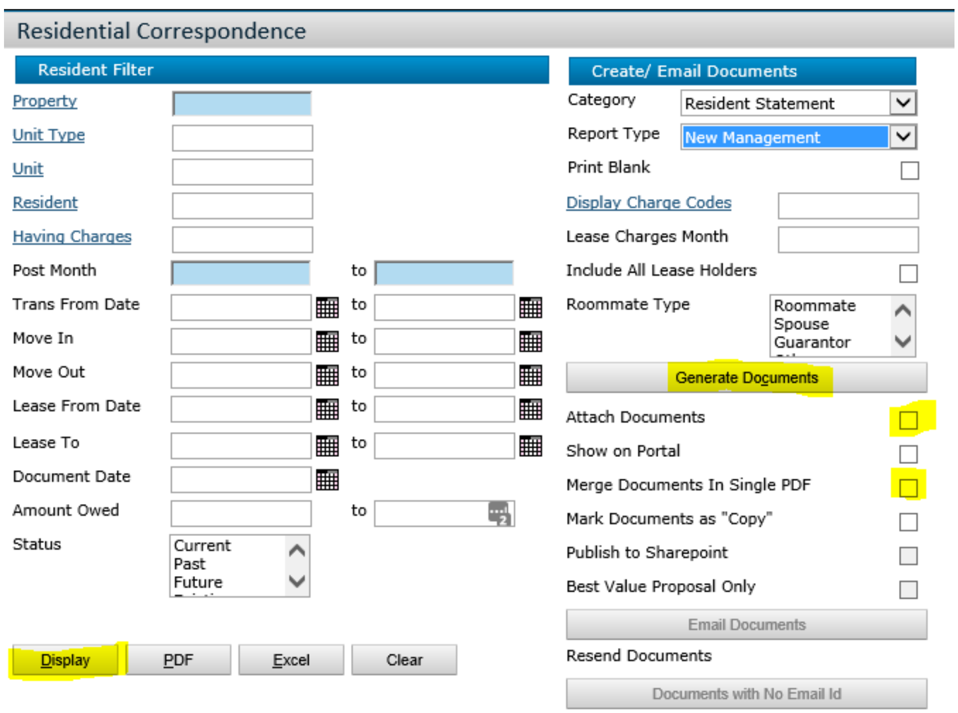
1. Set Object Type and Category on Filter, then click “Submit”.
2. On “Correspondence Configuration – System” Screen, fill in the Report Name you assigned in Step 1 and the Name of your Word document in the Main Page and Continuation Page fields.Click “Save”



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.)*

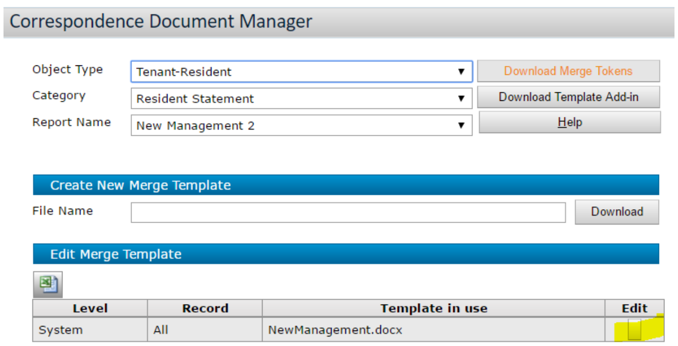


To Edit Correspondence Docs:

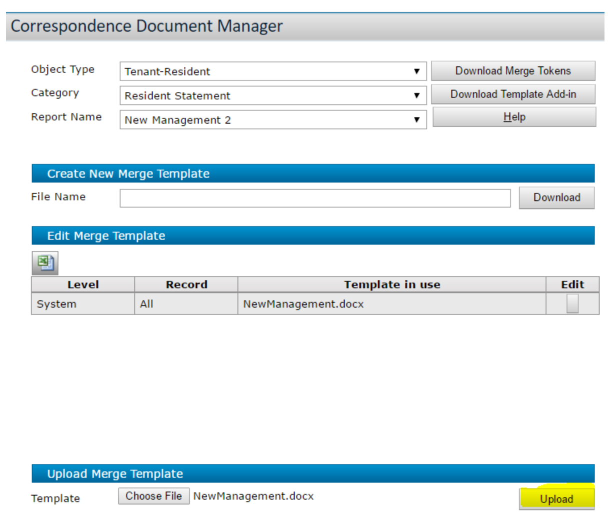
To retrieve the existing document from Yardi:

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

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



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.



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