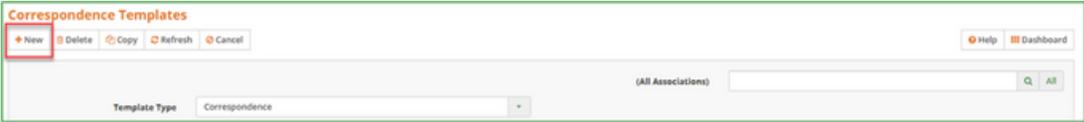


# CORRESPONDENCE TEMPLATE QUICK REFERENCE GUIDE

Template Type	Use
ACC Request Template	Responding to an ACC request submitted by a homeowner
Association Correspondence	Display on the Association Notes screen
Collection Template	Informing homeowner of past due balance
Correspondence	General homeowner communication
Covenant Template	Part of the Violation Template Hierarchy
Fee Notice	Print a letter along with a statement
Fining Policy Template	Part of the Violation Template Hierarchy
Vendor Correspondence	Displays on the Vendor Notes screen
Violation	Main letter template used for violation correspondence
Violation Sub Template	Part of the Violation Template Hierarchy
Welcome Letter	Generated for a new homeowner after a Resale is completed in CINC

## Correspondence Template Screen

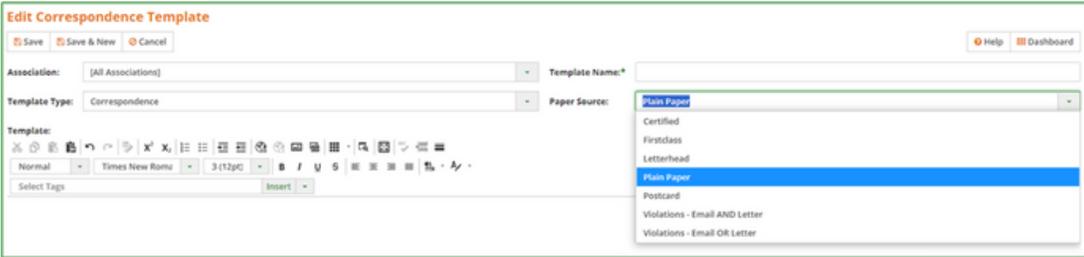


Select Tools/Correspondence Template

- o Templates can be created in a single or All Associations view

- o Select the Template Type from the drop down menu and click New

## Create a New Template



Add a Template Name, select the Paper Source and click Save – Remember to click save often



# CORRESPONDENCE TEMPLATE QUICK REFERENCE GUIDE

## Merge Tags

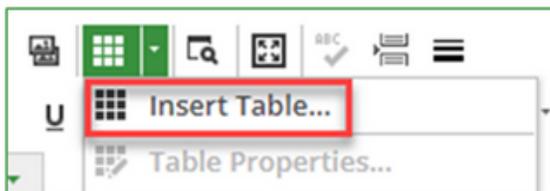


Place the cursor where the tag is to be placed, select the tag name and click Insert

·Commonly used Merge Tags:

- o Association Name - Will pull the Association Name as defined on the Association Setup screen.
- o Association Remittance Address - This address pulls from the association setup address screen when a remittance address type exists. Typically, this would be your company's lockbox address.
- o Homeowner Name and Address - Will pull the combination of the name and address as setup on the main information screen. Property Address
- o Owner Name and Address - Will pull the name and address as determined by the Owner Mailing address button. Mailing Address
- o \*Chosen Name and Address - Currently this tag only works with the collection's module. Through that module the user can choose address types that will have letters generated. This tag pulls the name and address for the chosen address

## Insert a Table



- Best Practice: Place text within a table to create the margins for the correspondence
- The lines of the table will not print on the letter
- To edit the Table/Row right click within the table and select Table Properties or Row Properties



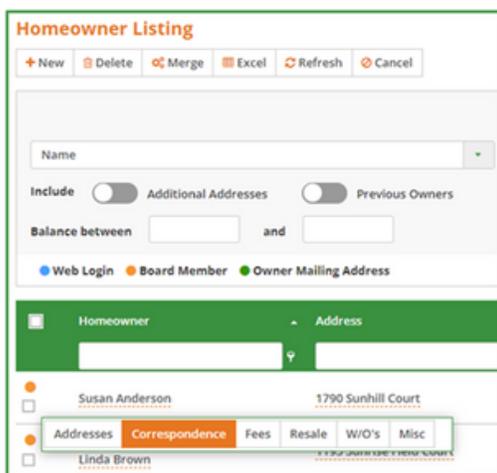
# CORRESPONDENCE TEMPLATE QUICK REFERENCE GUIDE

## Multiple Page Templates



·Best Practice: Insert the page break outside of the table and insert a new table for the next page

## Testing the New Template



Select Homeowners/Homeowners

- o Hover over the check box next to the Homeowner name and click Correspondence
- o Click New on the Correspondence Listing screen



# CORRESPONDENCE TEMPLATE QUICK REFERENCE GUIDE

## Testing (Contd.)

The screenshot shows a web application interface for creating correspondence. At the top, there's a title bar 'Notes History - Robert Brown (Owner)' with buttons for 'Save', 'Refresh', and 'Cancel'. Below this is a table with columns for 'Date', 'Next Contact', 'Entered By', and 'Note Type'. The table is currently empty, displaying 'No data to display'. Below the table are several form fields: 'Description' (set to 'Letter Test'), 'Corr Type' (set to 'Letter'), 'Status' (set to 'Open'), 'Note Date' (set to '10/12/2023'), and 'Note Type' (set to 'Misc Item - Private'). There is also a 'Next Contact' field and a 'Template' dropdown menu. A rich text editor is visible, showing a letter template for 'Test Training Association' with a logo and contact information. The letter content includes the recipient's name and address, and a salutation 'Dear Robert Brown & Linda Brown'.

- Fill in the Description, Corr Type, Status and Note Type. Select a Private Note Type to prevent the homeowner from seeing the letter on their WebAxis account
- Select the Template from the drop down menu and click Go to populate the letter then click Save

This screenshot shows the same form as the previous one, but with additional actions. The 'PDF' button in the top toolbar is highlighted with a red box. Below the form fields, there is a table with one row containing a checkbox, the date '10/12/2023', the name 'CINC Trainer', and the note type 'Misc Item - Private'. Below this table, the 'Attachments' field is highlighted with a red box, showing a file named 'MiscItem-Private 10-12-2023.pdf' with 'Manage' and 'View' buttons.

- Click PDF to generate the letter as an attachment and then click View to see the most recent pdf generated
- Click Manage to view the list of all generated letters
- To have the system generate a new letter after making changes to the Template select the template from the drop down menu, click Go, click Save, click PDF and then click View to see the new letter



# CORRESPONDENCE TEMPLATE QUICK REFERENCE GUIDE

## Generate Letters in Mass

- Select Tools/Quick Correspondence
  - o Select an association
  - o Select Homeowners and click save in the smaller window
  - o Select the Template and click Post
  - o The file will be available in the File Queue. Click on the numbers next to the Queue to access this screen

Date	Description	Status	Last Download
11/01/2023	Monthly Financials	Pending	Never
10/13/2023	Quick Correspondence Report	Completed	Never
10/13/2023	Quick Correspondence Report	Completed	10/13/2023

- The Quick Correspondence Report can be opened by clicking on the link after the Status has changed to Completed. Click Refresh on the screen if the status is still Pending.
  - o The File Queue screen defaults to Last 2 Days in the Show Items Created field.
  - o Items are not deleted by the system from this screen. A user must check the box next to the file and click Delete to remove a file.

