Generate Correspondence Operation

Insurance
Insurance policy details for Clients and Vendors
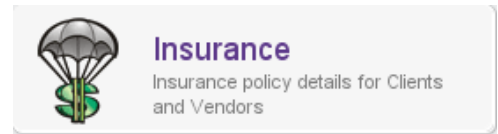
The Generate Correspondence Operation is found on the Operations menu of the Insurance capsule (Agreements tab). The purpose of Insurance correspondence is to quickly pull a list of certificates (Vendor or Tenant or both) and craft letters or emails (or both) requesting certificate renewals or general information from the group of insured parties.

Setting up and Building the Correspondence list

Whatever criteria you select for your insurance list will be what you use to generate your expiration letters. You also have the option to choose only some of the records in this list.

Bring up your Insurance listing by right clicking on the Insurance capsule and choosing your search preference.

Open By Search
Open With No Records
Open With Maximum Records

- **Open By Search:** allows you to customize a search. For example, here you can search for all Group 1 vendor insurance certificates that expire this month.

- **Open With No Records:** opens up a blank Insurance Certificate list.

- **Open with Maximum Records:** opens your Insurance Module with the maximum amount of insurance certificate records (including Inactive records).

Insurance List

Number ▲	Division	Property	Insured Party	Contact	Insurer	Date Issued	Expiration Date	Verified
0004	100BE	100 BEA…	BUGBEGONE	HOLMES.BUGSY	UMBRELLA	January 1, 2012	December 1, 2012	☑
0005	100BE	100 BEA…	ABC	BRITE.JACK	INSUREDPRO	January 1, 2008	June 30, 2012	☑
0008	100BE	100 BEA…	PAINTME	ROLLER.FRANK	INSUREDPRO	February 1, 2008	February 28, 2013	☑
0011	100BE	100 BEA…	ACTADV	BUNGEE.BOB	INSUREDPRO	March 1, 2008	September 30, 2012	☑
0012	100BE	100 BEA…	PLYMROCKS	STONE.TONY	UMBRELLA	June 1, 2007	July 1, 2012	☑
0013	100BE	100 BEA…	ATLNTCWTR	FAUCET.PHIL	ATLANTIC	June 1, 2007	July 1, 2012	☑
0014	100BE	100 BEA…	BOSBECLE…	SHINE.GLADYS	UMBRELLA	June 1, 2007	July 1, 2012	☑
0017	100BE	100 BEA…	ABC	BRITE.JACK	INSUREDPRO	January 1, 2008	May 31, 2012	☑
0018	100BE	100 BEA…	BUILDITUP	DIGGER.DAN	ATLANTIC	August 1, 2009	August 1, 2012	☐
0021	100BE	ALMIRA…	AMPESTCTL	CDC			September 1, 2011	☐

Hints:

- Clean up the list by hiding any records you do not wish to send insurance correspondence to by highlighting the record(s) and clicking the hide icon in the toolbar

- You can also hold down your control key on your keyboard and only highlight records that you wish to send insurance correspondence to from this list. Only the highlighted records will have insurance correspondence sent to them.

- Sort the list by Expiration Date to quickly see which certificates you need to send insurance correspondence to by clicking on the column name "Expiration Date".

If you do not have this column in your list, right click on the title of any column you see and select **Add Column**. You can also remove columns by right clicking on the column you want to remove and selecting **Remove Column**.

Generating Insurance Correspondence
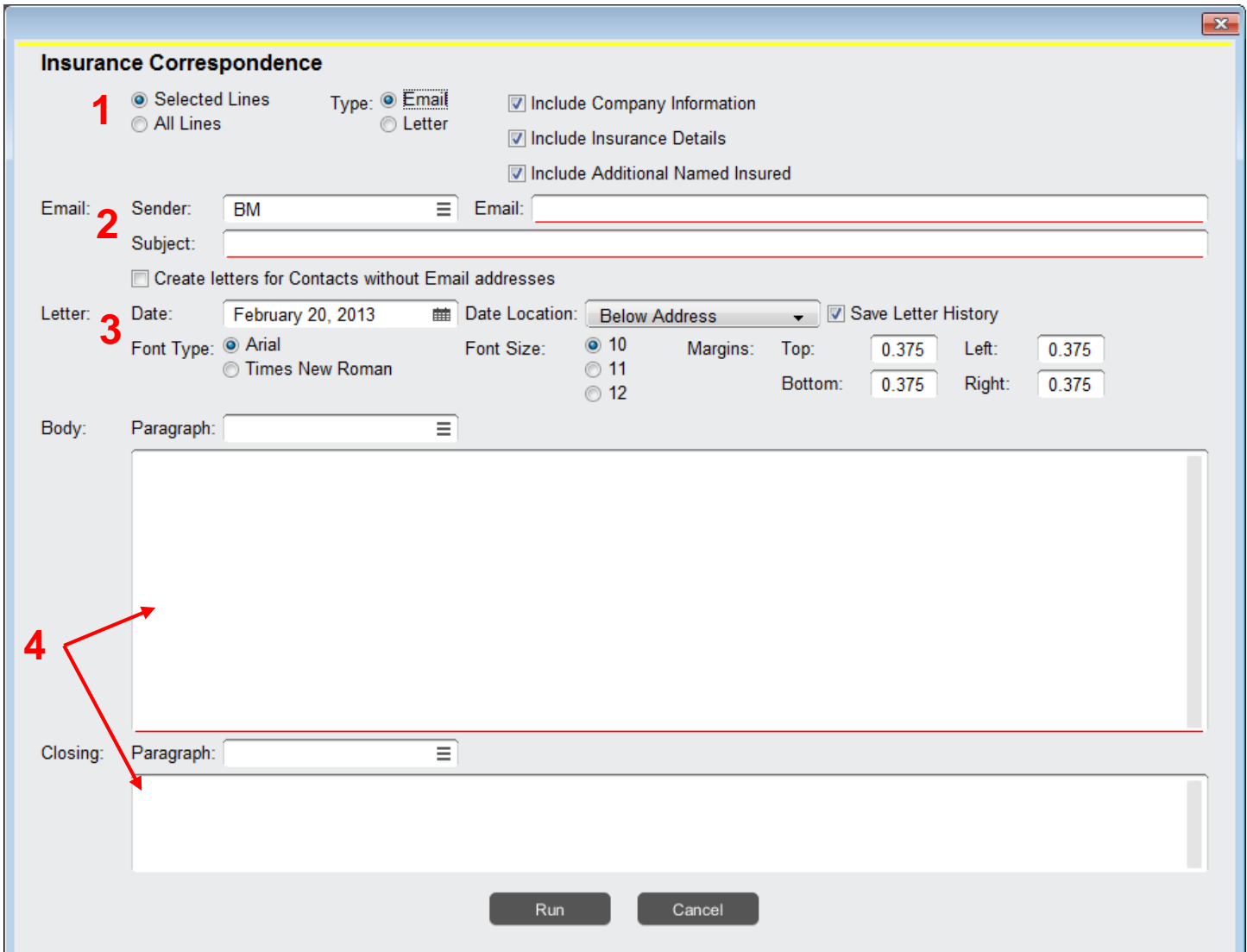
Highlight the records you wish to send insurance correspondence to - remember only the records that are highlighted will have correspondence generated for them.

Insurance List 🏠 📄 ➕ 📋 ✏️ 🗑️ ⬆️ ⬇️ ▨ 🔍 ▦ 🔄 ▥ 🖨️ 🖶 ✉️ ▦ [Operations ⬍]

Number ▲	Division	Property	Insured Party	Contact	Insurer	Date Issued	Expiration Date	Verified
0004	100BE	100 BEA...	BUGBEGONE	HOLMES.BUGSY	UMBRELLA	January 1, 2012	December 1, 2012	☑
0005	100BE	100 BEA...	ABC	BRITE.JACK	INSUREDPRO	January 1, 2008	June 30, 2012	☑
0008	100BE	100 BEA...	PAINTME	ROLLER.FRANK	INSUREDPRO	February 1, 2008	February 28, 2013	☑
0011	100BE	100 BEA...	ACTADV	BUNGEE.BOB	INSUREDPRO	March 1, 2008	September 30, 2012	☑
0012	100BE	100 BEA...	PLYMROCKS	STONE.TONY	UMBRELLA	June 1, 2007	July 1, 2012	☑
0013	100BE	100 BEA...	ATLNTCWTR	FAUCET.PHIL	ATLANTIC	June 1, 2007	July 1, 2012	☑
0014	100BE	100 BEA...	BOSBECLE...	SHINE.GLADYS	UMBRELLA	June 1, 2007	July 1, 2012	☑
0017	100BE	100 BEA...	ABC	BRITE.JACK	INSUREDPRO	January 1, 2008	May 31, 2012	☑
0018	100BE	100 BEA...	BUILDITUP	DIGGER.DAN	ATLANTIC	August 1, 2009	August 1, 2012	☐
0021	100BE	ALMIRA...	AMPESTCTL	CDC			September 1, 2011	☐

[Operations ⬍]

	Generate Correspondence
🔍	Insurance Discrepancy Report
	Insurance Expanded Report
	Insurance Correspondence Report

Click on the **Operations** button and select **Generate Correspondence**.

Your Insurance Correspondence window will open.

AWAREMANAGER

Insurance Correspondence

1 ○ Selected Lines   Type: ● Email   ☑ Include Company Information
    ○ All Lines   ○ Letter   ☑ Include Insurance Details
                       ☑ Include Additional Named Insured

Email: **2**   Sender: BM   Email: _____
       Subject: _____
       ☐ Create letters for Contacts without Email addresses

Letter: **3**   Date: February 20, 2013   Date Location: Below Address ▾   ☑ Save Letter History
       Font Type: ● Arial   Font Size: ● 10   Margins: Top: 0.375   Left: 0.375
            ○ Times New Roman   ○ 11
                             ○ 12   Bottom: 0.375   Right: 0.375

Body: Paragraph: _____

4

Closing: Paragraph: _____

[Run] [Cancel]

1. This portion of the window addresses what type of correspondence will be sent (Email or Letter), inclusion of Company Information (address, logo etc.), Insurance Details (policy details, required amount, etc.) and Additional Named Insured.

2. This is where information for electronic correspondence (email) is entered.

3. This is where information and specifications for hard copy letter correspondence is entered.

4. This area is where you decide what Paragraph information will show on all correspondence. You have the option for two sets of paragraphs: a body and a closing.

Fields

- **Type** is the type of correspondence you wish to send: Email or Letter.

Note: If you choose Letter as opposed to Email, the screen stays the same, but the mandatory fields for Email and Subject (here highlighted in red) will no longer be highlighted.

- **Include Company Information**: use this if you are not printing on letterhead; if printing on letterhead you may wish to omit this information.

- **Include Insurance Details**: include this information to show the policy details and required and limit amounts of coverage on your correspondence.

- **Include Additionally Named Insured**: include this information which will show the additional insured information on your correspondence.

- **Email Sender**: is the email address of the person who is logged in.

- If Sender is selected, **Email** will populate automatically.

- **Subject** is free form text for the subject of the email.

- **Create Letters for Contacts without Email addresses**: would create a hard copy letter for those contacts that do not have a linked email address.

- **Letter Date** is the date which prints on the letter.

- **Font Type**, Font Size and Margins effect how the letter will print.

- **Date Location**: controls whether date appears above or below the address line.

- **Body**: is the body of text that will print out on each letter or email.

- **Closing**: will appear on the letter below the body.

Insurance Correspondence: filled out example

Insurance Correspondence

- ○ Selected Lines   Type: ● Email   ☑ Include Company Information
- ○ All Lines   ○ Letter   ☑ Include Insurance Details
                                       ☑ Include Additional Named Insured

Email: Sender: AMJXT ☰   Email: amjxt@awaremanager.com

Subject:

☐ Create letters for Contacts without Email addresses

Letter: Date: February 12, 2013 ▦   Date Location: Below Address ▾   ☑ Save Letter History

Font Type: ● Arial   Font Size: ● 10   Margins: Top: 0.375   Left: 0.375
           ○ Times New Roman   ○ 11   Bottom: 0.375   Right: 0.375
                                    ○ fffgg

Body: Paragraph: IC-TENANT-FINAL ☰   Insurance certificate fi...

As stated in the lease, all tenants must provide evidence of the required tenant provided insurance. According to our records, the insurance coverage listed on the certificate of insurance on file in our office is about to expire.

In order to prevent additional action by the Landlord, please forward evidence of renewal or replacement insurance immediately. If you have any questions please contact us at the management office 617-542-8555.

For your convenience, details of your expiring certificate(s) are listed below.

Closing: Paragraph: IC-CLOSING ☰   Insurance Certificate cl...

Sincerely,

AwareManager Property Management Company

[Run]   [Cancel]

Field Referencing

Insurance fields can be referenced in the body or subject of emails and letters created using the operation. This is most helpful when set up within a Paragraph record, which can then be added to any correspondence and will reference the fields from the record. The format of any references needs to be [Insurance.Fieldname].

Examples include: [Insurance.NumberValue]   [Insurance.Contact]   [Insurance.Insurer]
                            [Insurance.Vendor]   [Insurance.DateIssued]   [Insurance.Property]
                            [Insurance.Phone]   [Insurance.Fax]   [Insurance.Notes]

Insurance Correspondence Summary report will appear on screen detailing if your letters/emails were created and results.

Insurance Correspondence Summary
Aware Demonstration
10 Practice Lane
Experimenticity, EX 02109-0123

Name	Result
Page Reed America's Book Club	Letter was created
The Dot Com Company	Letter was created - Contact Name is not defined. - Contact Title is not deined. - Salutation is not defined. To Whom It May Concern was used.

Records printed: 2

Hint: If you see a message here that tells you that a letter cannot be created, there will also be an explanation why to show you what needs to be corrected. In this example both letters were created, but the second letter had no contact name, title or salutation so AwareManager will use "To Whom It May Concern".

Insurance Letters shown on screen

DIG Property Group
50 Congress Street
Boston, MA 02109

DATABASE
INTERNATIONAL
GROUP

Tony Stone
Regional Manager
Plymouth Rocks
100 Beacon Street North Tower
Bosto, MA 02109

Sep 29, 2009

Dear Tony Stone,

As stated in the lease, all tenants must provide evidence of the required tenant provided insurance. According to our records, the insurance coverage listed on the certificate of insurance on file in our office is about to expire. Please forward evidence of renewal or replacement insurance to be received in our offices no later than 10 days prior to the expiration date of the insurance certificate.

For your convenience, details of your expiring certificate(s) are listed below.

Coverage	Policy	In Force Dates From	To	Occurrence	Amount	Required Amount
GL	787-0009	Jun 1 07	Jul 1 08	each	$1,250,000	$1,000,000
WC		Aug 1 07	Jul 31 08		$920,000	$750,000

Additional Named Insured: AwareManager Management Service Company
100 Beacon Street LLC

Sincerely,

AwareManager Property Management Company