**AWAREMANAGER**

Generate Emails and Letters

Generate Emails and Generate Letters are Operations meant for sending either email correspondence or actual letters.

These Operations can be found in the following capsules:

- **Contacts**

- **Clients:** can be sent to either the Billing Contact or the Work Contact

- **Properties:** sent to the Property Contact

- **Units:** sent to the Unit Contact

- **Vendors:** sent to the Vendor Contact

- **Work:** sent to the Work Contact

- **Purchases:** sent to the Vendor Contact

- **Contact Groups:** sent to list of Contacts in the Contact Group
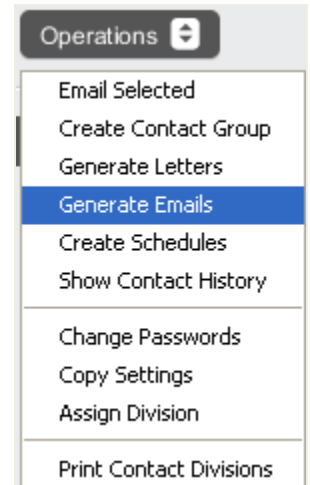
You can use the **Generate Emails** operation to create an email for a single contact or a group of contacts. Once selected, the Generate Emails window (shown below) will open.

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To Generate Emails:

1. You may choose to send the email to the **Selected Lines** or **All Lines.**

2. Enter a Sender: select from a list of contacts – this person's email will automatically default from their contact record.

3. You may choose to select a **Paragraph** as the Body and Closing sections, or you can type freely into these text boxes.

4. The **Sender**, **Email** and **Body** fields are all mandatory fields.

Once you have finished creating the email, click on the Save icon. A **Generate Emails Summary Report** will open, allowing you to see key information about the emails that were sent (or if any weren't sent, it explains why).

AwareManager | jxt

Generate Email Summary Report
DIG Property Group
50 Congress Street
Boston, Massachusetts 02109
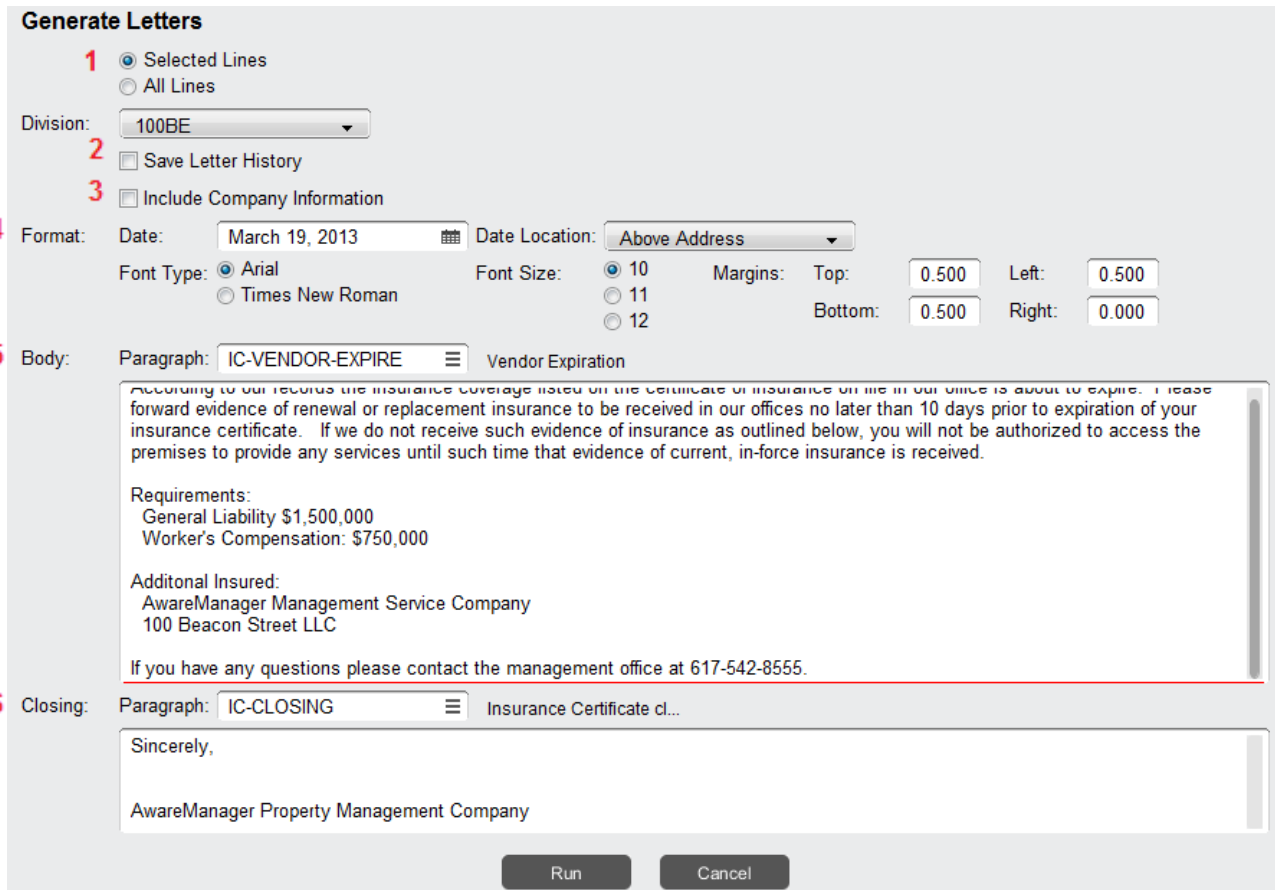
Marker	Name/Organization	Messages
BAGGADONUTS.JOEY	Joey Baggadonuts	Email was created
BEAVER.JIM100BE	Jim Beaver	Email was created
BUNGEE.BOB100BE	Bob Bungee	Email was created

Records printed: 3

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You can use the **Generate Letters** operation to create a letter for a single contact or a group of contacts. The letters will be addressed to each contact based on the Name, Address, and Salutation fields in the Contact capsule.

For example, in the Contacts capsule, you would complete the following steps to send out a letter:
1. Go to **Operations→Generate** Letters from the List View in the Contacts capsule.

2. Once selected, the Generate Letters window will open (shown below).

There are many options on the Generate Letters window that are available when creating your letter.
3. The first section allows you to decide if you would like to send this letter to the **Selected Lines** in your list or to **All Lines** in the list.

4. The **Save Letter History** option is available if you would like this letter to be saved in the Letters History capsule (on the Communication tab).

5. The **Include Company Information** checkbox gives you the option to show your own company's information at the top of the letter (if you are using company letterhead you should not select this option).

6. The **Format** section gives you the ability to define the date you would like shown on the letter, the font, font size and the margins (if you are using letterhead, these margins will have to be formatted to meet your needs).

7. In the **Body** section you can either select a paragraph to print as the body of the letter or you can type directly into the text box. Also, if you select a paragraph, you have the ability to change any of the text from that paragraph to fit your needs.

8. The **Closing** section works the same way as the **Body.** You can choose a paragraph or type freely into the text box.

Similar to Triggers, the user can define field values from the main record and insert those into the subject or body of a letter. The fields must be referred to in the format [Capsule.Field], for example **[Work.WorkStatus]** or **[Work.CustomField06]**.

Once you have finished creating the letter, click on the green check mark.

A Generate Letters Summary Report will open, allowing you to see key information before the letters are printed.

When you close the Generate Letters Summary Report window, a Generate Letters window will appear. This window will show you the exact format of each letter that you have created. This allows you to look over the letters before printing.

If all of the letters are ready to be printed, select the printer icon located at the top left of the window.

DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

Jim Beaver
BOSTEA
100 Beacon Street North Tower,testing a really long address for the statement
report
Boston, MA 02109

November 15, 2012

Dear Jim Beaver,

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 expiration of your insurance certificate.   If we do not receive such evidence of insurance as
outlined below, you will not be authorized to access the premises to provide any services until such time that
evidence of current, in-force insurance is received.

Requirements:
 General Liability $1,500,000
 Worker's Compensation: $750,000

Additonal Insured:
 AwareManager Management Service Company
 100 Beacon Street LLC

If you have any questions please contact the management office at 617-542-8555.

Sincerely,

AwareManager Property Management Company

Correspondence History

To easily track communication with specific contacts, there is a "correspondence history" icon (available on the form view), which displays all communication (letters and emails) linked to that record.

Correspondence History

From	To	Text	Date	Time	Capsule	Outgoing
	CARDINAL.JOAN	Subject: Body: {} {} {} {} {}...	February 4, 2013	11:03	EmailHistory	Yes
	CARDINAL.JOAN	Subject: Body: {} {} {} {} {}...	September 10, ...	10:24	EmailHistory	Yes
	CARDINAL.JOAN	Subject: Body: YesNoNYNA...	May 14, 2012	11:39	EmailHistory	Yes
	CARDINAL.JOAN	Subject: Body: SVS100-N B...	April 23, 2012	15:57	EmailHistory	Yes
	CARDINAL.JOAN	Subject: Body: SVS100-N B...	April 23, 2012	15:57	EmailHistory	Yes
AMJXT	AMJXT	Subject: GENERAL reminder...	March 7, 2012	18:52	EmailHistory	Yes

Subject: GENERAL reminder: March 6, 2012 at 18:51
Body: Rem Notes: test
Rem Descr.:
December 1, 2012

Work Status: TEST1
Work Type: SIGNAGE
Work #: 0004
Work Project: FAKEPROJ

Purchase Entered By: {}