



Corporate Welcome Packet

Process Overview:

1. Confirm that the sale has closed: Make note of the estimated close date when the 6(d) is received and contact the owner or site manager to confirm the closing as taken place.
2. Contact AR and coordinate the resale within the system.
3. AR will move the new owner into the system which will trigger a “report” in the file queue for the next morning to be mailed or emailed.
4. Coordinate with the site staff to have the corporate packet delivered or send it to the new owner directly (if applicable).

System Settings: Save the Welcome Letter template for each association and upload any relevant documents.

1. Select **Setup/Association Setup**.
2. Choose an association.
3. On the **Association Information** screen, select the “Welcome Letter Template – Corporate” from the Welcome Letter drop down and click save.

Association Information

The screenshot shows the 'Association Information' form. At the top left are 'Save' and 'Cancel' buttons. The form contains fields for 'Association Code' (with value 'TEST'), 'Name' (with value '*Test Training Association'), and 'Short Name'. On the right, there is a 'Welcome Letter' dropdown menu with the value 'Welcome Letter Template - Corporate' selected. Below this is an 'Active' checkbox. A 'Dashboard' button is in the top right corner. A red box highlights the 'Save' button, and a red circle highlights the dropdown arrow on the 'Welcome Letter' menu.

4. Scroll down to the bottom and click on the **Notes** tab.

The screenshot shows a row of navigation tabs: 'Info', 'Addr', 'Streets', 'Sections', 'Notes', 'Directory', 'Invoicing', 'Users', '1099', 'Sub Assoc', and 'Misc'. The 'Notes' tab is highlighted with a red box.

4. Click **New**.

Correspondence History - ABC Condo association

The screenshot shows a row of buttons: '+ New', 'Delete', 'Refresh', and 'Cancel'. The '+ New' button is highlighted with a red box.

5. Enter the following fields and click **Save**:

- **Description:** Enter a description for the new note (ie. Welcome Packet Attachments)
- **Corr Type:** Select the welcome letter correspondence type from the dropdown.
- **Status:** Select Open from the dropdown.
- **Note Type:** Select Note from the dropdown.

Notes History - ABC Condo association

The screenshot shows the 'Notes History' form. At the top are 'Save', 'Refresh', and 'Cancel' buttons. On the right are 'Help' and 'Dashboard' buttons. Below is a table with columns: 'Date', 'Next Contact', 'Entered By', and 'Note Type'. The table is empty, with a message 'No data to display' below it. At the bottom, there are input fields for 'Description' (with value 'Welcome Aboard'), 'Status' (with value 'Open'), 'Note Date' (with value '08/25/2020'), 'Corr Type' (with value 'Welcome Letter'), and 'Note Type' (with value 'Note'). The 'Description', 'Status', 'Note Date', 'Corr Type', and 'Note Type' fields are highlighted with red boxes.



6. Once the note is saved, a fillable attachment field will appear. Click **Manage**.

Notes History - ABC Condo association

+ New Save Delete PDF Email Refresh Cancel Help Dashboard

Date	Next Contact	Entered By	Note Type
08/26/2020		Beth Still	Note

Description: Welcome Letter #2 Corr Type: Welcome Letter

Status: Open Attachments: (Select Attachment) Manage View

Note Date: 08/26/2020 Note Type: Note

Next Contact:

7. Click **Choose File** to browse to and select all of the documents to be added as part of the welcome packet.

Association Correspondence Attachments - ABC Condo association

Save Delete Refresh Cancel

Select an attachment Choose File No file chosen

Uploaded	File Name	Size	Welcome Letter
There are currently no attachments uploaded.			

8. Click **Save** after each addition.

Association Correspondence Attachments - ABC Condo association

Save Delete Refresh Cancel Dashboard

Select an attachment Choose File No file chosen

Uploaded	File Name	Size	Welcome Letter
☐	8/27/2020 Property Resales Ownership Transfers Workbook Participant Guide.pdf	523 KB	
☐	8/27/2020 Optimal Outsource Setup Procedures 20200626.pdf	777 KB	

9. If multiple documents are added, enter the order in the **Welcome Letter** column in which the documents will appear in the packet.

10. Complete this procedure until all attachments have been added.

Association Correspondence Attachments - ABC Condo association

Save Delete Refresh Cancel Dashboard

Select an attachment Choose File No file chosen

Uploaded	File Name	Size	Welcome Letter
☐	8/27/2020 Property Resales Ownership Transfers Workbook Participant Guide.pdf	523 KB	2
☐	8/27/2020 Optimal Outsource Setup Procedures 20200626.pdf	777 KB	1

Sending the Packet:

1. Log in the following day and check the file queue.
2. Download the file and print or email it to the owner or send it to the site staff to include additional information.
 - a. If there is only one letter/packet included, you can email it from the file queue to the owner.
 - b. **Note*** that all resales that took place within the prior day for that property will be a combined into one PDF so ensure that the file is separated per owner before it is sent.