

Emailing Correspondence via CINC

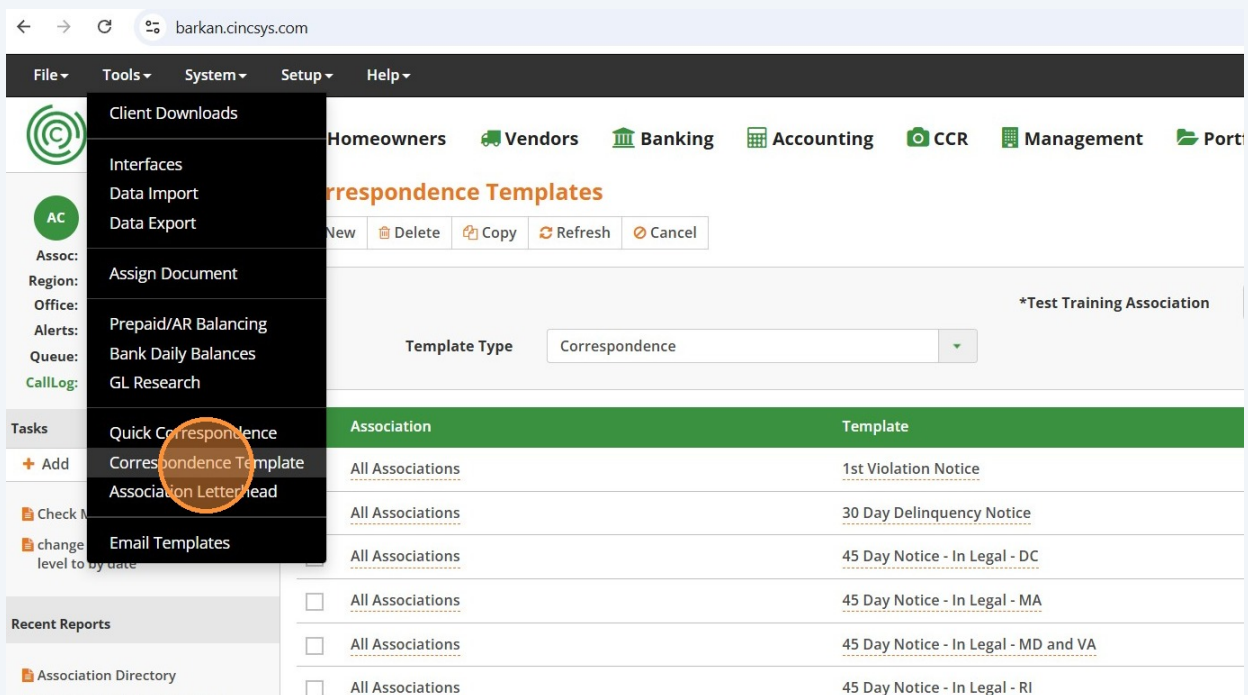
Learn how to set up a template for emailing one or multiple owners and how to send the letters using CINC email correspondence.

1

Steps 2-20 show how to generate an email using Quick Correspondence. To edit or resend an existing letter for an individual owner, skip to step 21.

2

Make sure the template is set up to generate an email. Click Tools, Correspondence Templates.



The screenshot shows the BARKAN CINC system interface. The 'Tools' menu is open, and 'Correspondence Template' is highlighted. The 'Correspondence Templates' page is displayed, showing a table of templates for associations. The table has two columns: 'Association' and 'Template'. The 'Association' column lists 'All Associations' for each row. The 'Template' column lists various notices and legal documents. The 'Quick Correspondence' option in the 'Tools' menu is circled in orange.

Association	Template
All Associations	1st Violation Notice
All Associations	30 Day Delinquency Notice
All Associations	45 Day Notice - In Legal - DC
All Associations	45 Day Notice - In Legal - MA
All Associations	45 Day Notice - In Legal - MD and VA
All Associations	45 Day Notice - In Legal - RI

3 Select the template you want to use for your email.

- If one doesn't exist, you can use or copy an existing template and change the settings to email as outlined below.

☐		
☐	*Test Training Association	Fee Increase Letter - test
☐	*Test Training Association	Fee Increase Letter - test b
☐	*Test Training Association	Fee Increase Letter TEST
☐	*Test Training Association	Fee Increase Letter test ac
☐	*Test Training Association	New Correspondence - Test
☐	*Test Training Association	Test Letter
☐	*Test Training Association	Test Letter Template - TEST
☐	*Test Training Association	Test Template
☐	*Test Training Association	Transition Letter 491
☐	*Test Training Association	WebAxis info and login
☐	*Test Training Association	WebAxis Log In Instructions - 123
☐	*Test Training Association	WebAxis Log In Instructions - test
☐	*Test Training Association	Welcome Letter Template

4 Click into the template and select "Email" as the Paper Source.

Vendors **Banking** **Accounting** **CCR** **Management** **Portfolio** **Reports** **Cephai+**

nce Template

raining Association **Template Name:** Test Template

pondence **Paper Source:**

es New Roma 3 (12pt) **B** **I** **U** **S** **Insert**

er, Re: Test Letter

ed....

DD^]

ieAddress^]

5

Change the name of the template if necessary so you can easily locate it on the quick correspondence page.

Template Name: * Test Email Template

Paper Source: Email

er,

Re: Test Letter

ed...

00ID^]

ieAddress^]

6

Type and format your email in the body below.

Assoc: TEST

Region:

Office:

Alerts: 41 Alerts waiting

Queue: 0 / 1875

CallLog: 0 / 0

Tasks

+ Add View Fee

Check Manager App Requests

change payment posting from by level to by date

Recent Reports

Association Directory

Website Registrations By Cor...

Quick Correspondence Report

Quick Correspondence Report

Statement

Quick Links

66°F Cloudy

Search

Association: *Test Training Association

Template Name: * Test Email

Template Type: Correspondence

Paper Source: Email

Template:

Dear Homeowner,

Re: Test EmailLetter

Please be advised....

[^txtPropertyHOMD^]

[^txtOwnerNameAddress^]

[^TodayLong^]

7 Click "Save"

The screenshot shows the 'Edit Correspondence Template' page in the CINC Systems application. The left sidebar contains user information for Annie Caldon (AC), association details (TEST), and a list of tasks. The main content area has a title 'Edit Correspondence Template' and three buttons: 'Save' (circled in orange), 'Save & New', and 'Cancel'. Below the buttons are fields for 'Association' (set to '*Test Training Association'), 'Template Name' (set to 'Test Email'), 'Template Type' (set to 'Correspondence'), and 'Paper Source' (set to 'Email'). A rich text editor follows, containing the text: 'Dear Homeowner, Re: Test EmailLetter', 'Please be advised...', and a placeholder '[^txtPropertyHOID^]'. The browser's address bar shows 'barkan.cincsys.com'.

8 To generate your emails, go to Tools, Quick Correspondence.

The screenshot shows the CINC Systems application with the 'Tools' menu open. The 'Quick Correspondence' option is highlighted with an orange circle. The background shows the 'Edit Correspondence Template' page, which is partially obscured by the menu. The menu options include: Client Downloads, Interfaces, Data Import, Data Export, Assign Document, Prepaid/AR Balancing, Bank Daily Balances, GL Research, Quick Correspondence, Correspondence Template, Association Letterhead, and Email Templates. The 'Quick Correspondence' option is the one to be selected according to the instruction.

9

Click the search icon to select the homeowner you want to email. You can use the top box to select all owners, or check off the ones you need. There are additional filters at the top to narrow down by section, owner status, etc.

Quick Correspondence

Post Refresh Cancel

*Test Training Association

Homeowner

Blocked Accounts Blocked Association Accounts

Section (All Sections) Status (All except Previous and Blocked) Billing Type (Select Billing Type)

Save (3/24) Close

Account	Homeowner	Status	Address	Billing Type
☒ *TEST1100SFL	James Smith Mary Smith	Owner	1100 Sunny Field Lane # 114	Coupons
☒ *TEST1175SHD	Barbara Miller	Owner	1175 Sunhill Drive	Coupons
☒ *TEST1250SFL	John Johnson	Owner	1250 Sunny Field Lane	Coupons
☒ *EST1575SGC	David Garcia	Owner	1575 Sunny Glenn Court	Coupons
☒ *TEST1630SFC	Jennifer Rodriguez	Owner	1630 Sunny Field Court # 122	Coupons
☐ *TEST1770SHC	Charles Martin	Owner	1770 Sunhill Court # 124	Coupons
☐ *TEST1850HNL	Matt Kelly	Owner	1850 Hickory Nut Lane	Coupons

10

Hit Save to apply the selected owners.

Correspondence

Cancel Dashboard

*Test Training Association

Homeowner

Blocked Association Accounts

Save (5/24) Close

(All Sections) Status (All except Previous and Blocked) Billing Type (Select Billing Type)

Account	Homeowner	Status	Address	Billing Type
*TEST1100SFL	James Smith Mary Smith	Owner	1100 Sunny Field Lane # 114	Coupons
*TEST1175SHD	Barbara Miller	Owner	1175 Sunhill Drive	Coupons
*TEST1250SFL	John Johnson	Owner	1250 Sunny Field Lane	Coupons
*EST1575SGC	David Garcia	Owner	1575 Sunny Glenn Court	Coupons
*TEST1630SFC	Jennifer Rodriguez	Owner	1630 Sunny Field Court # 122	Coupons
*TEST1770SHC	Charles Martin	Owner	1770 Sunhill Court # 124	Coupons
*TEST1850HNL	Matt Kelly	Owner	1850 Hickory Nut Lane	Coupons

11 Select the template you created from the dropdown.

The screenshot shows the 'Quick Correspondence' form in a software application. At the top, there is a navigation bar with icons for Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, Reports, and Cepha. Below the navigation bar, the 'Quick Correspondence' section has buttons for Post, Refresh, and Cancel. The form itself has a header with '*Test Training Association' and a search bar. The 'Homeowner' field is set to 'Multiple Homeowners...'. The 'Template' dropdown menu is open, showing a list of templates. The 'Test Email Template' is highlighted with a blue bar and an orange circle. Other templates in the list include 'Test Letter', 'Test Letter Template', 'Test Letter Template - TEST', 'Test photo error', 'Transition Letter 491', 'Transition Letter Template 2025', 'WebAxis info and login', 'WebAxis Log In Instructions - 123', 'WebAxis Log In Instructions - Monthly Fees', 'WebAxis Log In Instructions - Quarterly Fees', 'WebAxis Log In Instructions - test', and 'Welcome Letter Template'.

12 Use status "open".

The screenshot shows the 'Quick Correspondence' form with the 'Status' dropdown menu open. The 'Homeowner' field is 'Multiple Homeowners...' and the 'Template' is 'Test Email Template'. The 'Status' dropdown menu is open, showing a list of status options. The 'Open' status is highlighted with a blue bar and an orange circle. Other status options include 'Closed', 'Approved', 'Approved - Awaiting Pinehills', 'Approved with Conditions', 'Denied', 'More Information Requested', and 'Pending'. The form also includes a rich text editor with a toolbar and a preview area. The preview area shows the following text: 'Dear Homeowner,', 'Please be advised....', '[^txtPropertyHOID^]', '[^txtOwnerNameAddress^]', and '[^TodayLong^]'. The bottom of the screenshot shows a Windows taskbar with various application icons.

13 Click "Post" at the top to generate the email.

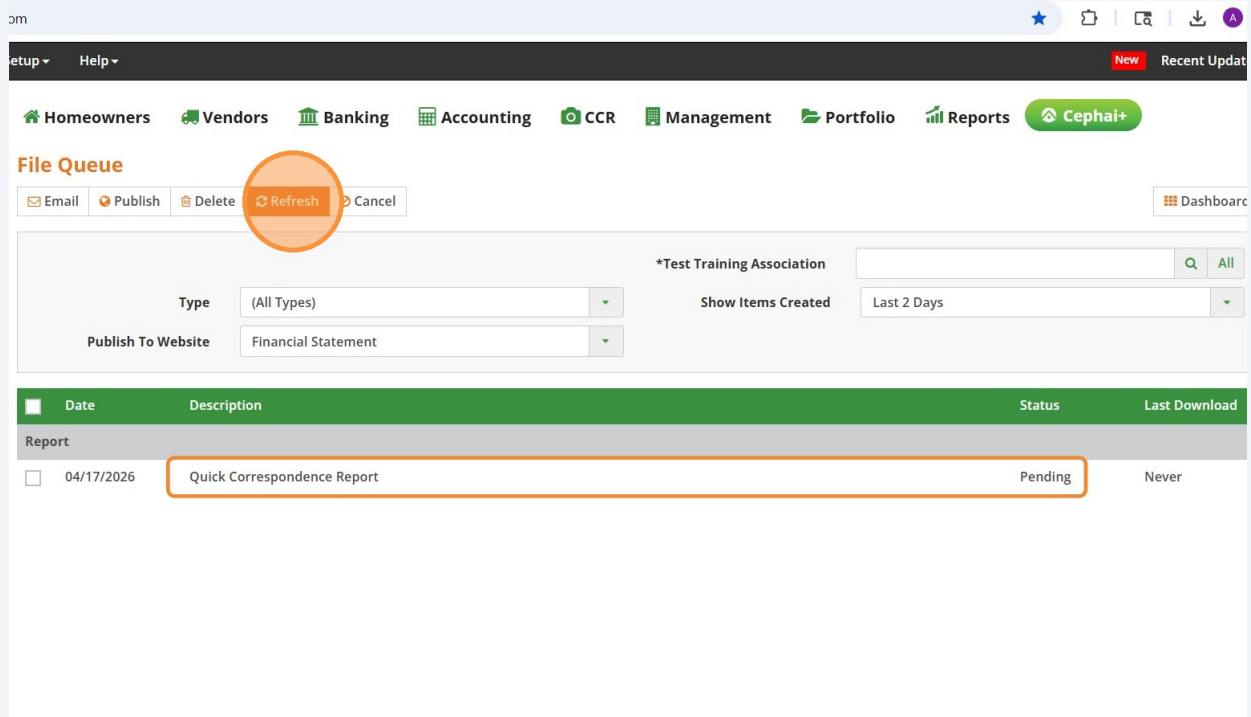
The screenshot shows the CINC Systems web application. The left sidebar displays user information for Annie Caldon (AC), including her association (TEST), region, office, and alert/queue status (41 Alerts waiting, 0 / 1875). The main area is titled 'Quick Correspondence' and features a 'Post' button circled in orange, along with 'Refresh' and 'Cancel' buttons. Below these are input fields for 'Homeowner' (Multiple Homeowners...), 'Template' (Test Email Template), and 'Status' (Open). A message box at the bottom indicates 'Your correspondence is currently being generated. Please check the queue for the status.' The email body text is visible, starting with 'Dear Homeowner,' and 'Please be advised....'.

14 Click the queue to the left of the screen to check the status of the correspondence.

The screenshot shows the CINC Systems web application. The left sidebar displays user information for Annie Caldon (AC), including her association (TEST), region, office, and alert/queue status (41 Alerts waiting, 0 / 1875). The main area is titled 'Quick Correspondence' and features a 'Post' button circled in orange, along with 'Refresh' and 'Cancel' buttons. Below these are input fields for 'Homeowner' (Multiple Homeowners...), 'Template' (Test Email Template), and 'Status' (Open). A message box at the bottom indicates 'Your correspondence is currently being generated. Please check the queue for the status.' The email body text is visible, starting with 'Dear Homeowner,' and 'Please be advised....'.

15

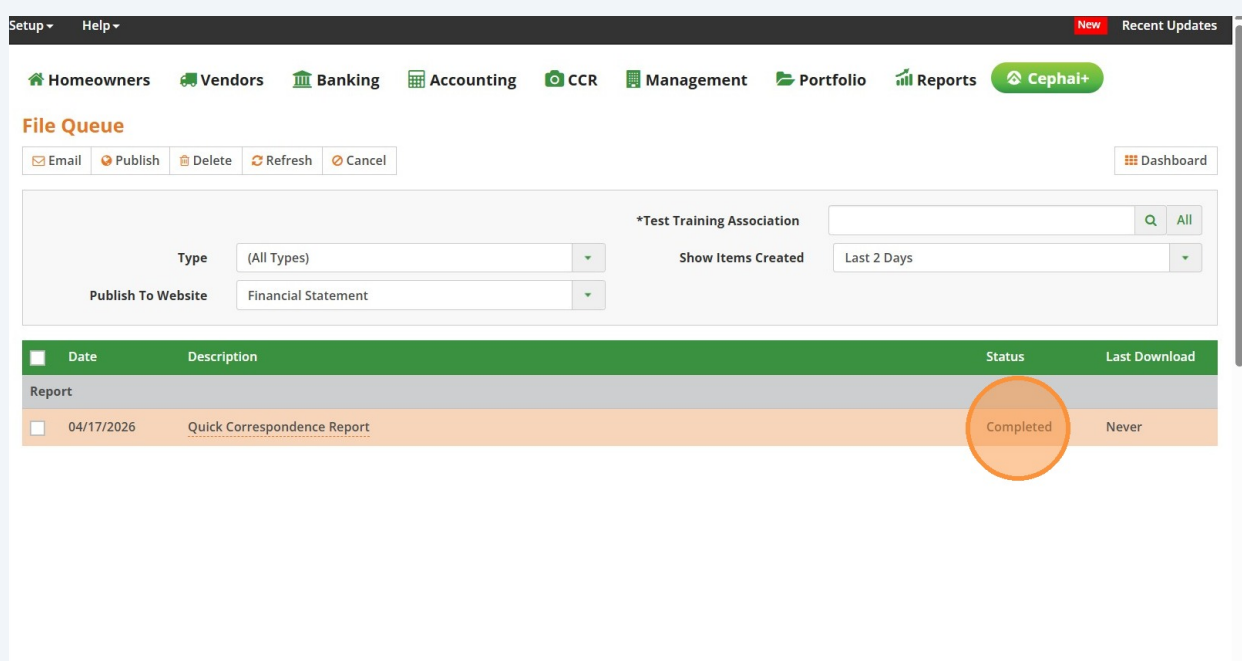
The email will show as a "Quick Correspondence Report" and will show pending while it generates. Give it a minute or so and click "refresh" until it shows as complete. Note* larger correspondences may take longer to generate. You may need to wait several minutes.



16

When it's done generating it will show "Completed". Click on the "Quick Correspondence Report" to download a preview of the letter or email.

- Note* a completed report is not automatically sent to the owner. You still need to email it at this point.



17 To send it, go to Homeowners, "Email Correspondence".

The screenshot shows the CINC Systems interface. The top navigation bar includes Homeowners, Vendors, Banking, Accounting, CCR, Management, and Portfolio. The left sidebar shows the user profile for Annie Caldon (AC) with details: Assoc: TEST, Region: , Office: , Alerts: 41 Alerts waiting, Queue: 1 / 1875, and CallLog: 0 / 0. Below the profile are sections for Tasks (Add, View, Fee) and Recent Reports (Quick Correspondence Report, Association Directory, Website Registrations By Cor..., Quick Correspondence Report). The main content area shows a dropdown menu for Homeowners with options: Homeowners, Post Adjustments, Post Charges, Pending Payments, Unmatched Payments, Pending Closing Checks, Pending Scanned Checks, Batch Posting, Email Statements, Email Correspondence (highlighted with an orange circle), Export Print Jobs, Print Queue, Transaction History, Payment Search, Resale, Generate Billing, Generate Coupons, and Print Statements. The background shows a form for *Test Training Association with fields for (All Types) and Financial Statement, and a button for Show Items Created.

18 Find the job from the drop down. It will likely be towards the top and will show the property number and "Correspondence" as the job name.

The screenshot shows the Email Correspondence page in the CINC Systems interface. The top navigation bar includes Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. The left sidebar shows the user profile for Annie Caldon (AC) with details: Assoc: TEST, Region: , Office: , Alerts: 41 Alerts waiting, Queue: 1 / 1875, and CallLog: 0 / 0. Below the profile are sections for Tasks (Add, View, Fee) and Recent Reports (Quick Correspondence Report, Association Directory, Website Registrations By Cor..., Quick Correspondence Report). The main content area shows a dropdown menu for Email Correspondence Jobs with options: (Select Job), (Select Job), 04/17/2026 [TEST] 5 Correspondence (highlighted with an orange circle), 04/16/2026 [403] 1 Collection, 04/16/2026 [TEST] 25 Auto-Registration, 04/06/2026 [403] 1 Collection, 04/02/2026 [600] 1 Collection, 04/01/2026 [403] 1 Collection, 04/01/2026 [600] 9 Collection, 03/25/2026 [583] 1 Violation, 03/24/2026 [439] 1 Correspondence, 03/24/2026 [439] 1 Correspondence, 03/23/2026 [403] 1 Collection, and 03/17/2026 [403] 4 Collection. The background shows a form for Email Correspondence with fields for Account #, Name, Status (Unsent), and Email Address. A message "No Letters found." is displayed.

19 Click the checkbox at the top to select all owners, or you can choose a select few.

The screenshot shows the CINC Systems web application. The left sidebar contains user information for Annie Caldon (AC), including her association (TEST), region, office, and alert/queue status. The main content area is titled 'Email Correspondence' and features a toolbar with 'Email', 'Delete', 'Refresh', and 'Cancel' buttons. Below the toolbar, there's a section for 'Email Correspondence Jobs' showing a date filter and a status dropdown. A table lists email correspondence jobs with columns for 'Account #', 'Name / Address', and 'Email Address'. The first row is highlighted with a green header, and a checkbox is visible next to the account number. The table lists four entries for the 'Test Training Association'.

Account #	Name / Address	Email Address
*TEST1100SFL	James Smith Sunny Field Lane	fbursucanu@gmail.com lynnsimpson81032@gmail.com
*TEST1250SFL	John Johnson Sunny Field Lane	hhomeowner.1250@mail.com bfunnell035@gmail.com
*TEST1175SHD	Barbara Miller Sunhill Drive	hhomeowner.1175@mail.com
*TEST1575SGC	David Garcia Sunny Glenn Court	hhomeowner.1575@mail.com sgregory@barkan.com sgregory@barkanco.com

20 Click "Email".

This screenshot shows the same CINC Systems web application, but with the 'Email' button circled in orange. Additionally, the checkboxes in the table from the previous screenshot are now checked, indicating that all email correspondence jobs are selected.

Account #	Name / Address	Email Address
*TEST1100SFL	James Smith Sunny Field Lane	fbursucanu@gmail.com lynnsimpson81032@gmail.com
*TEST1250SFL	John Johnson Sunny Field Lane	hhomeowner.1250@mail.com bfunnell035@gmail.com
*TEST1175SHD	Barbara Miller Sunhill Drive	hhomeowner.1175@mail.com

21

To edit or create a letter and email it to an individual owner, follow the steps below.

22

Find the unit on the homeowners listing and scroll down the unit information page and click on the "Correspondence" tab.

The screenshot displays a software interface for managing unit information. On the left, a sidebar lists items: "*Test Training Association", "Robert Keith 2180 Potomac Clu...", "Version 46.2.1.36-Y", and "System Requirements". The main area contains a form with the following fields: "Mobile Phone", "Billing Type" (set to "Statements"), "Account Type" (set to "Checking"), "Routing No.", "Parking Space or Sticker #", "Storage", "Beneficial Interest", "FOB/Visitor Tag/Other", and "CINC Manager Comment". To the right of the form is an "Activity Log" section with a "Generate Prenote" button and an "Account No." field. At the bottom, a horizontal menu of tabs includes "Addresses", "Correspondence" (highlighted with an orange circle), "Fees", "Information", "Transactions", "Resale", "W/O's", "Misc", and "Consolidated Billing". The Windows taskbar at the bottom shows the date and time as 5:41 PM, the weather as 54°F Mostly cloudy, and a search bar.

23

If the letter was already generated it will show on the correspondence listing. Click on the date to open it.

- If you need to create an email, click "New" at the top and create a new correspondence note. See CINC QRG or the Generating Correspondence guide for more information.

Correspondence Listing - Robert Keith (Owner)

Buttons: + New, Delete, Close, Refresh, Cancel

Correspondence Type: (All Types)

For Dates: [] To: []

View By: Issues, Notes

Date	Status	Last Modified	Next Contact	Violation # / Descr / Type / Details
03/24/2026	Open	03/24/2026		Welcome Letter

Addresses, Correspondence, Fees, Information, Transactions, Resale, W/O's, Misc

24

Click on the Letter note and scroll down to edit the body of the letter if needed. Any attachments can be added by clicking "manage" in the attachments field. Click save at the top to keep your changes.

Notes History - Robert Keith (Owner)

Buttons: + New, Save, Delete, PDF, Email, Refresh, Cancel

Note Type: (All Types)

For Dates: [] To: []

View By: Notes, Letter

Date	Next Contact	Entered By	Note Type
03/24/2026			Letter

Description: Welcome Letter

Status: Open

Note Date: 03/24/2026

Next Contact: []

Template: (Select a Template)

Corr Type: Welcome Letter

Attachments: Letter_03-24-2026.pdf (Manage, View)

Letter

March 24, 2026

Robert Keith
2180 Potomac Club Parkway # 1
Woodbridge, VA 22191
Account Number: 123456789

Welcome to *Test Training Association and congratulations on the purchase of your home!

On behalf of the *Test Training Association, we are pleased to introduce Barkan Management Company, Inc. as the managing agent for your Association. Our firm is an Accredited Management Organization (AMO®) with the Institute of Real Estate Management and is the premier manager of condominiums and HOA's throughout New England and the Mid Atlantic.

Your dedicated Barkan representative, Annie Caldon manages *Test Training Association, provides advice and counsel to the Board, and oversees the day-to-day operations of the community. Annie Caldon can be reached at acaldon@barkanco.com or (404) 123-4567 and is supported by the Corporate Team. Please feel free to contact them regarding general matters and routine service requests.

25 Click the check box next to the letter and hit email at the top.

The screenshot shows the Barkan Management Company software interface. The top navigation bar includes links for Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, Reports, and Cephai+. The left sidebar shows the user profile for Annie Caldon, with a queue of 2159 alerts. The main area displays the 'Notes History - Robert Keith (Owner)'. A table lists notes with columns for Date, Next Contact, Entered By, and Note Type. The first note is dated 03/24/2026 and is a 'Letter'. A checkmark is visible in the first column of this row. Above the table, there are buttons for New, Save, Delete, PDF, Email, Refresh, and Cancel. The 'Email' button is highlighted with an orange circle. Below the table, there is a form for the selected note, including fields for Description (Welcome Letter), Status (Open), Note Date (03/24/2026), Next Contact, and Template. The 'Attachments' field shows 'Letter_03-24-2026.pdf'. The bottom of the screen shows a rich text editor with a toolbar and the text 'March 24, 2026'.

26 Fill in the send email box with any additional email addresses and a subject line. Select any attachments to be included and hit "E-Mail" to send.

The screenshot shows the 'Send Email' dialog box overlaid on the software interface. The dialog box has a green header with the title 'Send Email' and a close button. Below the header, there are buttons for 'E-Mail' and 'Cancel'. The 'E-Mail' button is highlighted with an orange circle. The dialog box contains fields for 'From' (Acaldon@barkanco.com), 'To' (annieejay@gmail.com), 'CC', and 'BCC'. The 'Subject' field is highlighted with an orange circle and contains the text 'Welcome!'. Below the subject field, there is a table for 'Attachments' with columns for Date and Size. The table shows one attachment: 'Letter_03-24-2026.pdf' with a date of 03/24/2026 and a size of 426 KB. The background shows the same software interface as the previous screenshot, with the 'Notes History' table and the 'Welcome Letter' form.