

TOPS PROFESSIONAL™
FORM LETTER MANUAL
Version 4.2

By
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It is also assumed that the user of this guide is familiar with basic windows functionality and navigation tools. Refer questions regarding the use of Windows Explorer to your system administrator.

Form Letters

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Form Letters

Form Letters are templates that use merge codes to insert owner information into the letter resulting in a letter that looks like it was individually typed. In addition to the owner name and address, there are merge codes for virtually ALL the data being tracked for an owner including their current account balance. There are also merge codes for community info and the management company, where applicable. Letters can either be printed and sent to owners, emailed to owners as email attachments, or sent to SouthData electronically for Certified, Certified + First Class or just standard First Class Mail delivery.

Form Letters can also be used to create ballots, billing statements or any form you can think of to send owners. Form Letters are a powerful and flexible tool that you can use in a variety of ways. Whenever you print, email or use SouthData to electronically send a Form Letter, it automatically updates the owner Communication History . You can mark any mailing through Form Letters as one that you “Bill to Community” so you can recover your mailing expense.

Although there are many features and options when creating form letters, the steps for generating an owner form letter are very easy:

1. Select the Letter
2. Select the Recipients
3. Generate the Letter
4. Select the Delivery Method
5. Process the Letters

The rest of the manual section on Form Letters will cover all the features and options available in detail, but you should keep in mind these 5 simple steps for generating Form Letters for owners.

Collection & Violation Letters

If you generate *collection letters* through the **Letters** button on the Owner Maintain screen or through the general Form Letter program, you will NOT have a full history of the letters like you would using Collection Action (AR Module) for collection letters. Therefore, we do NOT recommend generating these letters from the Owner Maintain screen or anywhere else in the Owner module. Instead, use Collection Action (AR Module) so the owner records are properly updated for the collection actions taken.

CCR Violation letters containing CCR Merge Codes cannot be printed through the **Letters** button on the Owner Maintain screen or through the general Form Letter program. Letters containing CCR Merge Codes may only be printed when a CCR record is opened or through Violation Action (CCR Module) so a proper history of violation letters is kept in each CCR record.

Certified Mail & Electronic Mail

TOPS interfaces with SouthData’s SignatureMail™ and CertMail™ systems so you can electronically generate First Class or Certified Letters wherever you use TOPS Form Letters. This service will save you significant time and effort since you can do a mailing right from your desk without needing to print the letter, copy it, stuff envelopes, or take it to the Post Office.

You can do Certified Mail without having to manually fill out forms. Through SignatureMail™ and CertMail™, you can see the status of any mailings and also get back the Certified Mail receipt after it is delivered—all electronically so you no longer need to keep paper copies in the file—another big time savings.


To use SouthData’s SignatureMail/CertMail™ system to automate the printing and delivery of owner mail, you will need to configure the SignatureMail/CertMail™® interface and also setup an account with SouthData. You can setup the account at:

<http://www.southdata.com/>

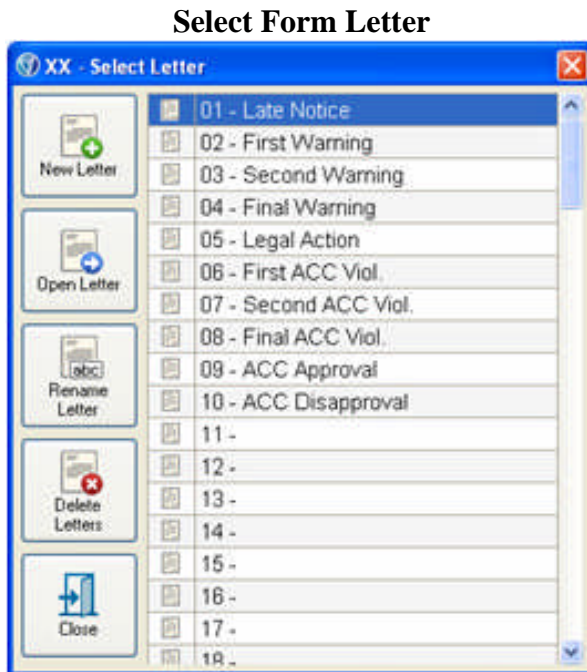
Or go to Communications on the TOPS Professional File Menu, then select “**Configure Mail Service**”. From here there is a link named “**Not registered? Sign Up**”. Detailed instructions for configuring the SignatureMail/CertMail™® interface and setting up a SouthData account are included later in this manual section under the heading “**Configuring Mail Service**”.

Form Letter Instructions

We’ll discuss setting up letter templates and using Form Letters.








	Click the Form Letter button to work with letter templates for this community.
---	---

You will see all the Form Letter templates that exist in this community:



We’ll cover each of the buttons on this screen.

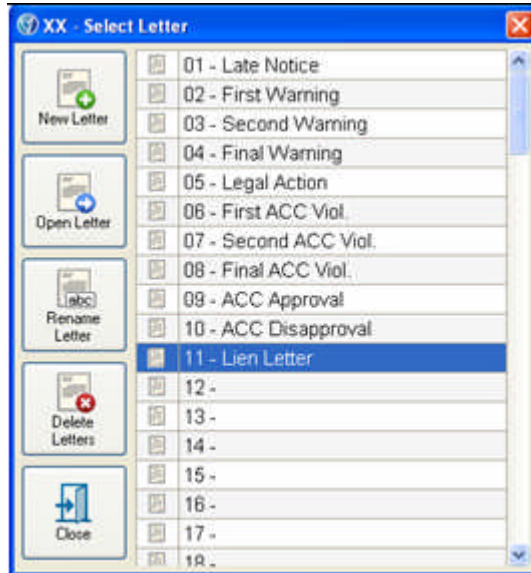
Button Menu

	<p>Click this button to Add a New Letter. We'll discuss how to add a new form letter under the Add Letter heading below.</p>
	<p>Click this button to Open a highlighted letter.</p>
	<p>Click this button to Rename a letter. Simply click to highlight the letter, then click the Rename button.</p> <div data-bbox="618 468 1118 678" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Please enter a new name for letter # 01</p> <input data-bbox="646 562 1094 600" type="text" value="Late Notice"/> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 5px;"> <input data-bbox="792 617 935 655" type="button" value="OK"/> <input data-bbox="954 617 1097 655" type="button" value="Cancel"/> </div> </div> <p>The existing letter name will be displayed. Type a new letter name.</p> <p>Click the OK button to save the new letter name.</p> <p>Click the Cancel button to exit without saving any changes.</p>
	<p>Click this button to Delete a highlighted letter. As a safeguard, you will see this confirming message:</p> <div data-bbox="573 989 1167 1213" style="border: 1px solid blue; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="color: blue; font-weight: bold;">Delete Letter</p> <div style="display: flex; align-items: center; gap: 10px;">  <p>This Action Cannot be Undone! Are You Sure You Wish to Delete Letter 11 - Lien Letter ?</p> </div> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 5px;"> <input data-bbox="740 1157 841 1188" type="button" value="Yes"/> <input data-bbox="878 1157 1000 1188" type="button" value="No"/> </div> </div> <p>To delete a letter, you must click on the YES button.</p> <p>Click the NO button to exit without deleting the letter.</p>
	<p>Click this button to Close the Form Letter menu and return to where you opened Form Letter.</p>
<p>Now we will go into detail on each major function of Form Letter.</p>	
<p>Add Letter</p>	
	<p>To create a new letter, click the Add Letter button.</p> <div data-bbox="643 1627 1094 1818" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Please enter a name for new letter # 11</p> <input data-bbox="670 1713 1073 1751" type="text" value="Lien Letter"/> <div style="display: flex; justify-content: center; gap: 10px; margin-top: 5px;"> <input data-bbox="802 1766 932 1797" type="button" value="OK"/> <input data-bbox="951 1766 1081 1797" type="button" value="Cancel"/> </div> </div> <p>Simply type a name for the new letter.</p> <p>Click the OK button to save the letter name and proceed.</p>

Click the **Cancel** button to exit without adding a new letter.

If you clicked the OK button, you will see the new letter name displayed:

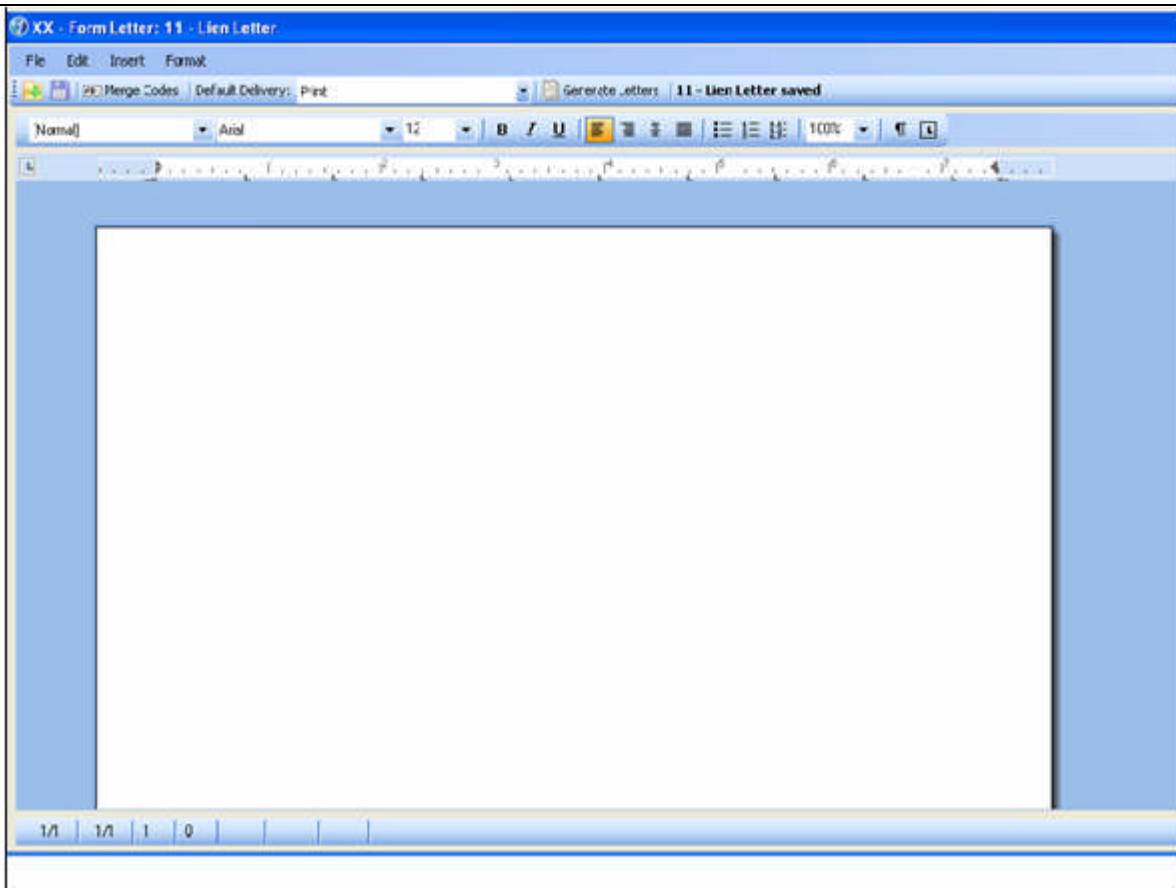
New Letter Name



Double click the highlighted letter name or click the **Open Letter** button to proceed to the letter text entry screen.

The letter text entry screen looks like this:

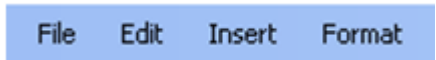
Letter Text Entry



The Form Letter in TOPS works similar to many other word processors, particularly MS Word®. We'll cover all the major functions of Form Letter.

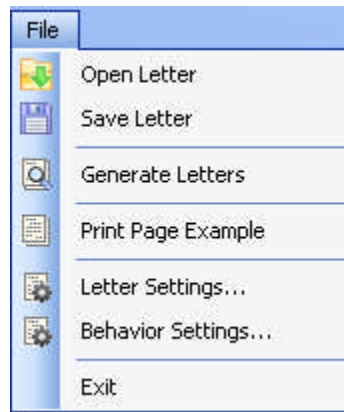
Working With Form Letters

We'll start with the File toolbar at the top of the Form Letter screen:



File

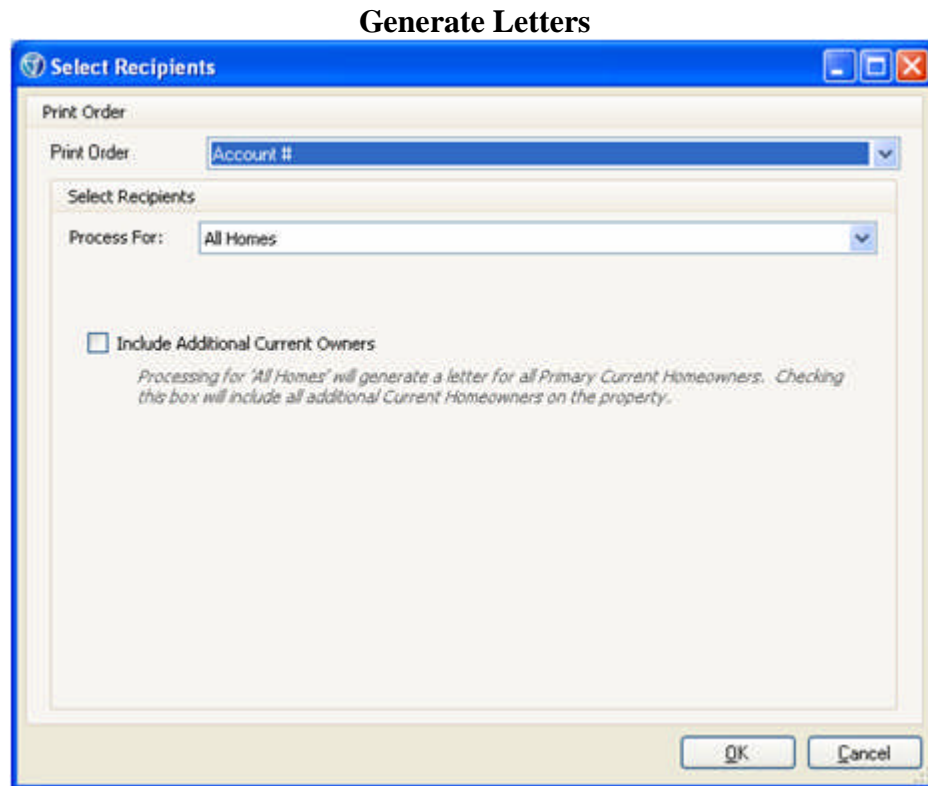
When you click on **File**, you will see this drop down menu:



Open Letter – click this menu choice to select an existing form letter in this community.

Save Letter – click this menu choice to save changes to an open form letter.

Generate Letters – click this menu choice to take an existing letter you have selected and print it for the owners you select on the following screen.



Notice you can select the print order and recipients:

Print Order – select either:

- Account #
- Lot/Unit #
- Street Address
- Sort Name
- Zip Code

Select Recipients – select who to send the letter to from these options:

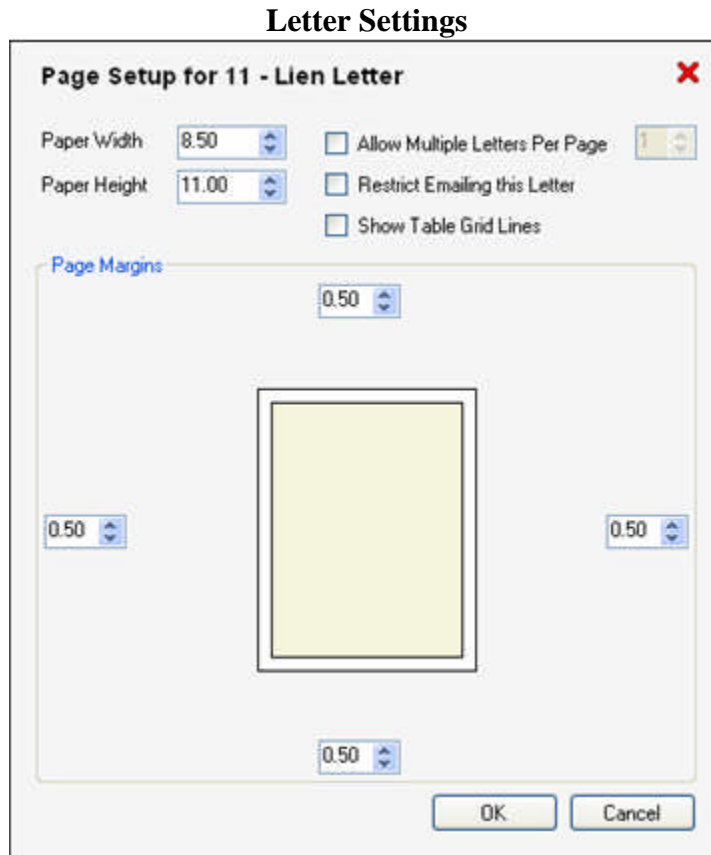
- All Homes
- Range of Homes
- Section/Building
- Selected Homes

Select Additional Current Owners – check here to generate letters for secondary owners.

Print Page Example – prints an exact copy of the form letter you have open but without owner information from the merge codes. You might use this to check the letter spacing and merge codes to make sure they are correct.

Letter Settings – lets you control the page setup for this letter. From here you can select paper size, margins and other options with the formatting of the letter.

You will see this screen:



Similar to other word processors, you can set your form size and margins. But there are some unique things on the above screen that you need to understand.

Page Width/Height – here is where you tell Form Letter the size of the paper you wish to print the letter on. The default is standard 8 ½ X 11 inches. You can define larger paper or landscape mode by changing the width and height.

Page Margins – the default is .50 inches (1/2 half inch) on all sides. You may increase or decrease each of the margins as you wish.

Allow Multiple Letters Per Page

Checkmark this option if you want to create a template that has multiple forms on a page, like a 3 per page Late Notice. You can then use this further option to specify how many forms are on a page. Typically, you would divide the page into 2 or 3 sections in order to have enough room for the verbiage and the Merge Codes that customize the form for each owner.


Restrict Emailing this Letter

Checkmark this option if this letter must be printed and cannot be emailed to an owner. Perhaps it is a collection letter that, by law, must be sent by First Class Mail. .

Show Table Grid Lines

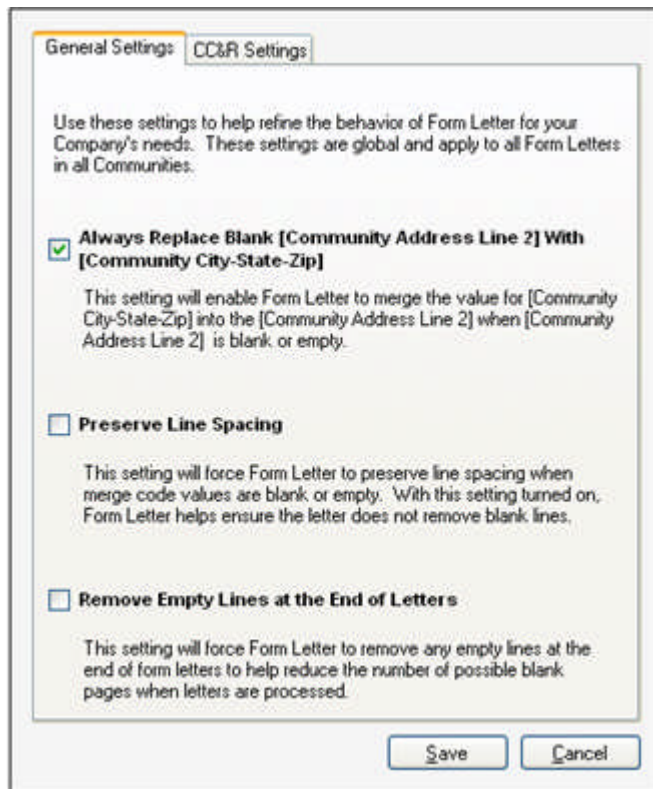
Checkmark this option if you have a table inserted into

the letter and want to have the table grid lines printed.

OK – click this button to save the Settings and return to the open Form Letter. As an alternative, you can also click on the  box at the top right corner of the screen to exit from the Page Setup screen.

Cancel – click this button to scratch any changes made to the Letter Settings and exit from the screen. The Letter Settings will revert to their previous settings.

Behavior Settings – globally sets some parameters for generation of form letters. That means these settings will apply to ALL form letters in ALL communities. When you click this menu item, you will see this screen:



General Settings – these apply to ALL form letters generated in TOPS.

Always Replace Blank <<Community Address Line 2>> with <<Community City-State-Zip>> – by default, this is check marked. It will make sure there is no blank line left in a printed form letter if the Merge Code for Community Address Line 2 is not needed and contains blank information.

Preserve Line Spacing – by default this is unchecked. If checked, it will insert a blank line in place of a Merge Code that contains no information because the field it pulls information from in TOPS is blank. You might need this blank line in order to keep the proper spacing of the form letter.

Remove Empty Lines at the End of Letters – By check marking this setting, if there are empty lines at the end of a form letter that would generate a blank page, this would ignore those lines so the blank page is not generated.

CCR Settings – clicking this tab displays settings that only apply to form letters that contain CC&R Merge Codes. The CC&R Settings screen looks like this:



Image Scaling – this setting is used when inserting pictures into CC&R letters. The higher the pixels, the better the picture image printed in the letters. However, the higher the pixels the slower the printing speed and the more space the letter takes to store.

You can set the scale from 100 to 800 pixels using the slide bar:

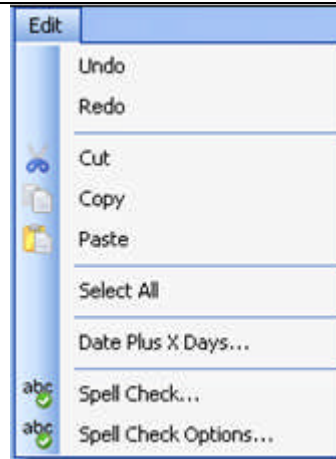


Save – Saves the Behavior Settings.

Cancel – scratches the changes made to the Behavior Settings and exits the user back to Form Letter.

Edit

When you click on **Edit**, you will see this drop down menu:



Undo – rolls back changes made to the form letter displayed on the screen while editing the letter in this session. If you save or close the letter, the Undo function will no longer be able to rollback changes made.

Redo – inserts changes back into the form letter that were undone through use of the Undo menu choice.

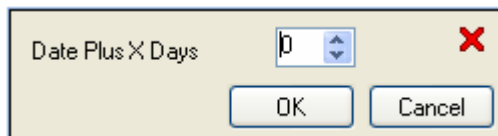
Cut – removes the highlighted letter text. It will then be available on the clipboard to be inserted elsewhere until the next time the Cut or Copy function is used which then overwrites anything stored on the clipboard.

Copy – stores a copy of the highlighted letter text on the clipboard to be inserted elsewhere until the next time the Cut or Copy function is used which then overwrites anything stored on the clipboard.

Paste – takes what is stored on the clipboard and inserts it into the letter where the cursor is positioned.

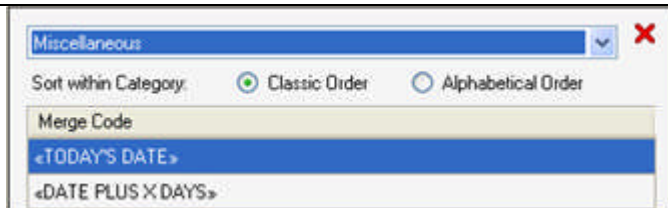
Select All – selects the entire letter to allow the user to either Cut or Copy it. This could be used to copy an existing letter to a new form letter that will have substantially the same wording and merge codes.

Date Plus X Days – you will see this screen for entering the + days:



This specifies the number of days for the Merge Code titled <<DATE PLUS X DAYS>> that can be useful for giving owners a grace period to send payment or resolve a CC&R violation.

This merge code is found under the Miscellaneous merge code category and look like this:

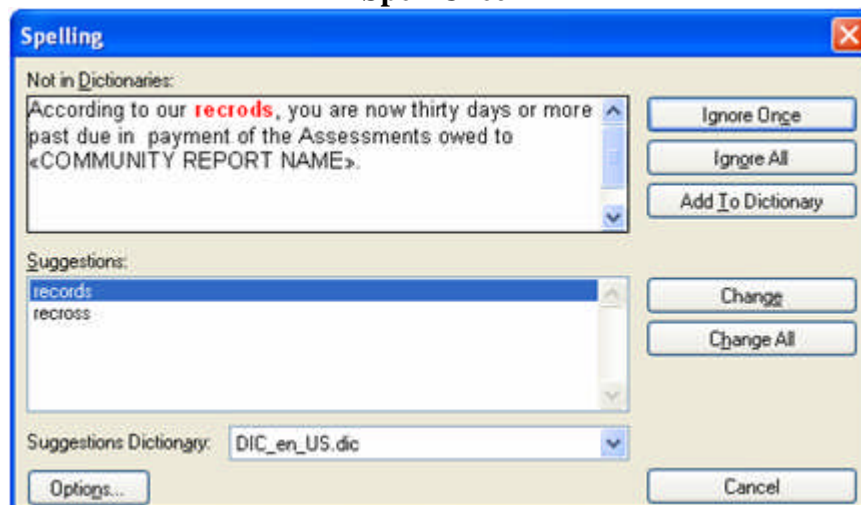


Spell Check – the TOPS Form Letter contains a full featured spell check to catch errors in spelling and punctuation. As you type or as it displays the letter on the screen the spell checker is always reviewing the text for misspellings. It underlines any potential misspelling with a wavy red line like this:

recrods.

When you click the Spell Check on the Edit menu it opens the full spell checker that looks for misspellings.

Spell Check



You have these options with each highlighted word that the spell checker thinks is misspelled:


Ignore Once – ignores the highlighted word this time only.

Ignore All – ignored each use of the highlighted word in the letter text.

Add to Dictionary – adds the highlighted word to the dictionary. This is handy when you want to add slang or a term you have coined that is not in a standard dictionary.

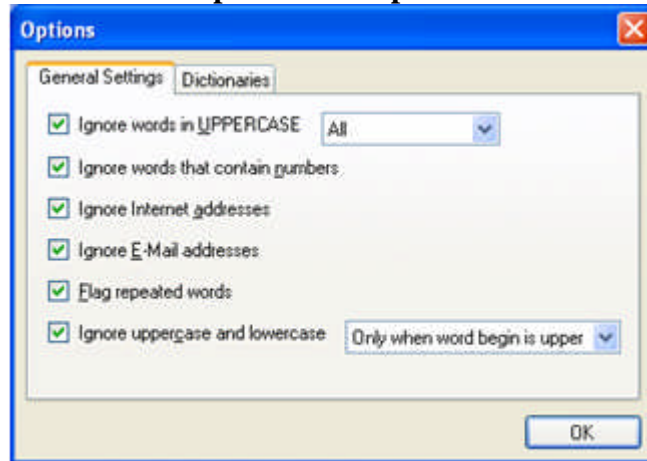
Change – click this button to change the highlighted word to the suggested correction word.

Change All – click this button to change the highlighted word to the suggested correction word throughout the letter displayed on the screen.

 The Options button on Spell Check lets you configure how Spell Check works. When you click the Options button, you will see this

screen:

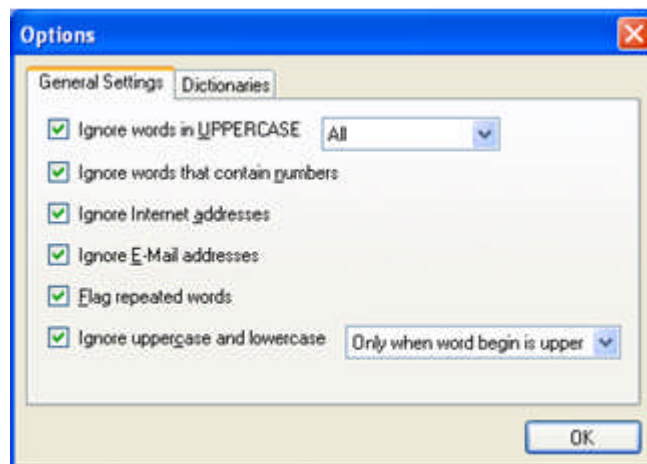
Spell Check Options



By default, all these options are check marked. We suggest leaving these options in their default state so that the spell checker will not flag as misspellings each of the items listed under options.

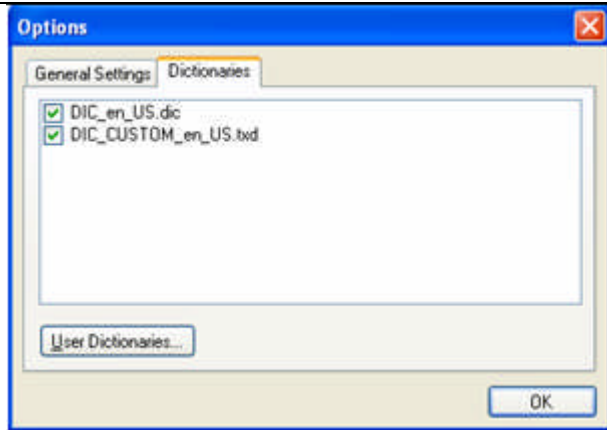
Spell Check Options – this Edit menu choice opens the same Options as above.

General Settings – We suggest leaving these options in their default state so that spell checker will not flag as misspellings each of the items listed.

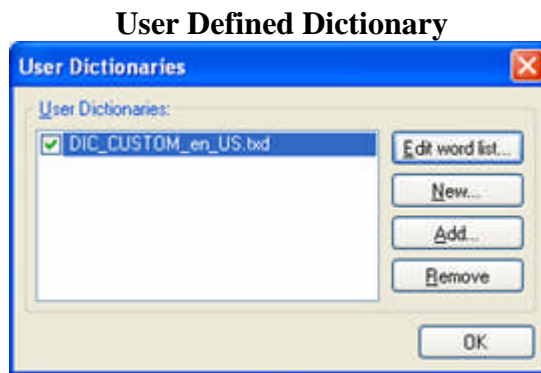


Dictionaries – this menu tab tells spell checker what online dictionaries to use.

Dictionaries Used



You could add your own dictionary to this list or add special words into the existing dictionaries through the **User Dictionaries** button. If you click the User Dictionaries, you will see this screen with several buttons:



Edit word list – change spellings of words in the dictionary.

New – add another dictionary to the ones that already exist. Spell checker will use all the dictionaries on file when reviewing letter texts and highlighting possible misspellings.

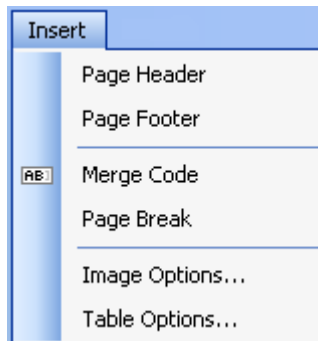
Add – add a word to the existing dictionary.

Remove – delete a word from an existing dictionary.

This completes the instructions for the **Edit** menu under Form Letter.

Insert

When you click on **Insert**, you will see this drop down menu:



included on each page of the form letter. Typical uses of a header are to include a logo or return mail address at the top of each letter.



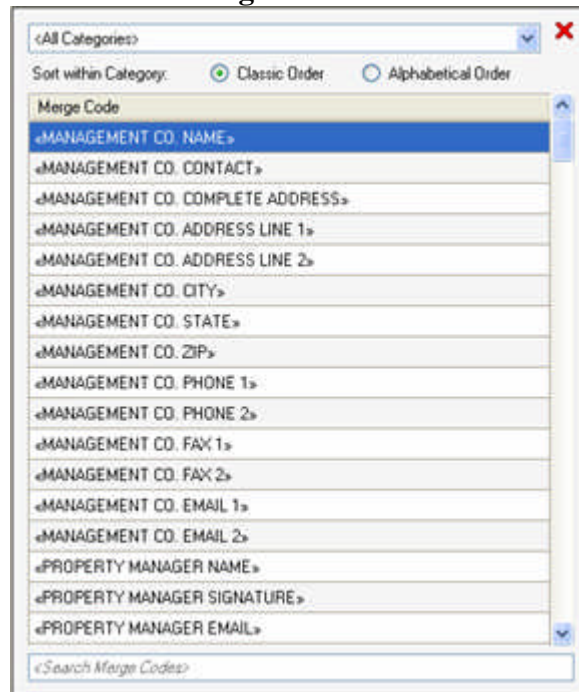
Page Footer – inserts a footer at the bottom of the page. The footer is then included on each page of the form letter. Typical uses of a footer are to include a page # or standard reference, like the letter name or data path on each letter.



Merge Code – there are hundreds of merge codes available in TOPS. There is a merge code for almost every piece of data stored in TOPS concerning the owners and the community in general.

Click this menu choice to insert a Merge Code at the cursor position in the form letter. The Merge Code browser pops-up for selecting the Merge Code to insert.

Merge Codes List



It defaults to showing *All Categories* of Merge Codes, but you can narrow the list by selecting one of these categories:

Merge Code Categories

- Management Company
- Community Fact Sheet
- Community
- Owner
- Owner Financial
- Charge Tables
- Miscellaneous Charges
- Flex Data
- CC&R
- Miscellaneous

Double click on the Merge Code you wish to insert it into the Form Letter. See the Merge Code section below for more details on Merge Codes in Form Letters.

Page Break – click this Insert Menu option to insert a page break where the cursor is positioned in the Form Letter.

Image Options – click this Insert Menu option to insert an image or picture in the Form Letter. You can then browse to select the image to insert.

Table Options – click this Insert Menu option to insert a table in the Form Letter. Tables are a great way to organize data into orderly rows and columns. When you click **Tables** you will see this settings screen:

Insert Table

Insert Table

of Columns: 2

of Rows: 3

Insert Close

Table Options

Add Rows / Columns:
BEFORE currently selected row / column

Add: Row Column

Remove: Row Column

Delete Selected Table

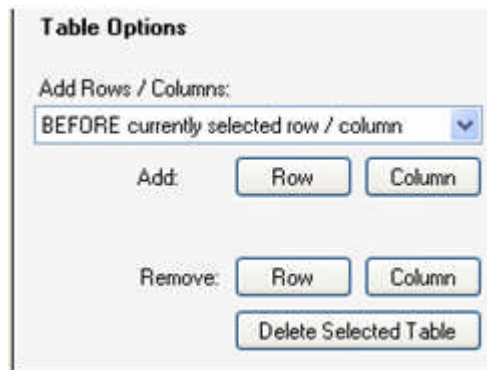
Set the # of Columns and the # of Rows for the Table, then click the **Insert** button. It will insert the table at the cursor position with the number of columns and rows you specified.

A table is a grid of rows and columns which looks like this:

Each “cell” in the table can be separately controlled with different fonts, justification and tab stops.

Table Options:

Once a table is created, you can click on it to make changes. It will show with the Table Options active:



Inserting/Deleting Rows/Columns

You can insert additional rows or columns or delete rows or columns through the Table Options area.

Column - A *column* is a vertical set of cells in the table.

Row – A *row* is a horizontal set of cells in the table.

Add Rows/Columns

You have 2 choices for where to insert additional rows or columns:

- Before currently selected row / column
- After currently selection row / column

Position the cursor where you want to insert a row or column based on the above choice, then click either **Row** or **Column** to insert a new one into the table.

Delete Rows/Columns

Simply position the cursor in the row or column you wish to Delete, then click either **Row** or **Column** to delete it.

Note: You cannot delete a Row or Column that has Merge Codes in it. You must delete the Merge Codes first, then you can delete the Row or

Column.

Delete Selected Table

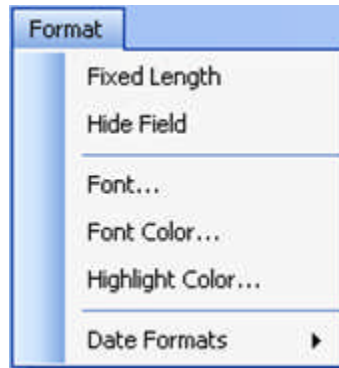
To delete a table entirely, first position the cursor in the table, then click the Delete Selected Table button.

Note: You cannot delete a Table that has Merge Codes in it. You must delete the Merge Codes first, then you can delete the table itself.

This completes the instructions for the **Insert** menu under Form Letter.

Format

When you click on **Format**, you will see this drop down menu:



Fixed Length Field – click this menu choice to fix the position of a Merge Code field. Since Merge Codes can have data of varying lengths, making them a Fixed Length Field lets you control the alignment of the Merge Code data.

For example, if you wish to itemize owner balances in a form letter using individually Merge Codes for each balance due, you would want to make them Fixed Length Fields so the dollars and cents line up in a column like this:

<u>Merge Code</u>	<u>w/o Fixed Length</u>	<u>w/Fixed Length</u>
<<(FL)A1 Balance Due>>	250.00	250.00
<<(FL)Late Fee Due>>	15.00	15.00
<<(FL)Othr Chrg>>	40.00	40.00
<<(FL)TOT AMT DUE>>	305.00	305.00

When you make a Merge Code a Fixed Length Field, it places and “FL” in front of the normal Merge Code like this:

<<(FL)Owner's Name >>	Maintenance <<(FL)A1 Balance Due>>
<<(FL)Mailing Address Line 1 >>	Late Fees <<(FL)Late Fee Due>>
<<(FL)Mailing Address Line 2 >>	Other <<(FL)Othr Chrg>>
<<(FL)Mailing City-State-Zipcode >>	TOTAL DUE<<(FL)TOT AMT DUE>>

Fixed Length Fields can be used to keep either a LEFT or RIGHT alignment of Merge Code data.

Hide Field – click this menu choice to hide a Merge Code field so that it does not print in the form letter. If the hidden field is a dollar amount, the amount in the

hidden field will still be included in a subtotal.

Font – click this menu choice to select a Font for the form letter text:



The font you select will change based on the cursor position within the form letter or for highlighted text. Click the **OK** button to complete the change.

Attributes – sets the text font with the following effects:

- **Normal**
- **Bold**
- **Italics**
- **Strikeout**
- **Underlining**

Font Color – click this menu choice to change the color of the text for the highlighted text or for background color.

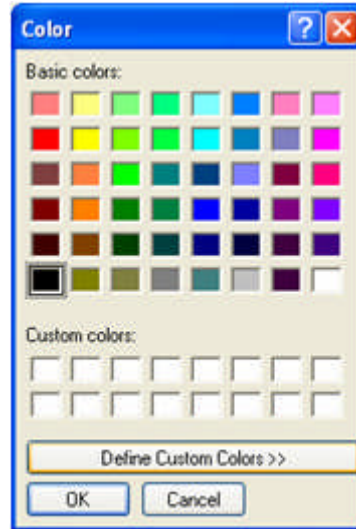
Text or Text Background

Select from among these colors:



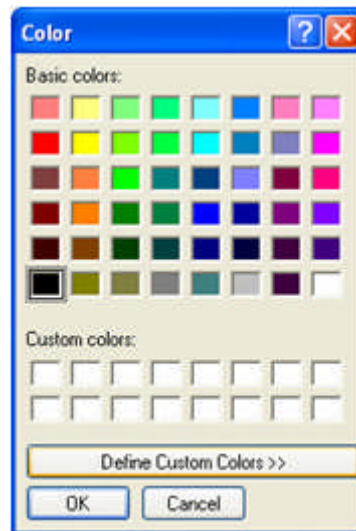
The color you select will change the text based on the cursor position within the form letter or for highlighted text. Click the **OK** button to complete the change.

Click the **Other** button to see more color choices or to select a custom color for text or backgrounds. The color selector is displayed.



Select a special color or define a custom color, then click **OK**.

Highlight Color – You can highlight text in the form letter with color to make it stand out. Once you have highlighted the text, click Highlight Color on the Format menu. You will see the color selector:



Select the color to highlight text of use the Define Custom Colors option.

Date Formats – when inserting a date merge code into a letter, you have the following options for how the date is presented in the letter:

	<div style="border: 1px solid blue; padding: 5px; width: fit-content; margin: 0 auto;"> <p>MM/DD/YYYY - example: 09/28/2012</p> <p>MM/DD/YY - example: 09/28/12</p> <p>Full - example: September 28, 2012</p> <p>Long - example: Friday, September 28, 2012</p> <p>Month - example: September</p> <p>Month (Number) - example: 9</p> <p>Day - example: Friday</p> <p>Day (Number) - example: 28</p> <p>Year - example: 2012</p> </div> <p>Simply click the date format you wish from this list of options.</p> <p>This completes the instructions for the Format menu under Form Letter.</p>
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Steps for Producing Form Letters

Although there are many features and options when creating form letters, the steps for generating an owner form letter are very easy:




1. Select the Letter
2. Select the Recipients
3. Generate the Letter
4. Select the Delivery Method
5. Process the Letters

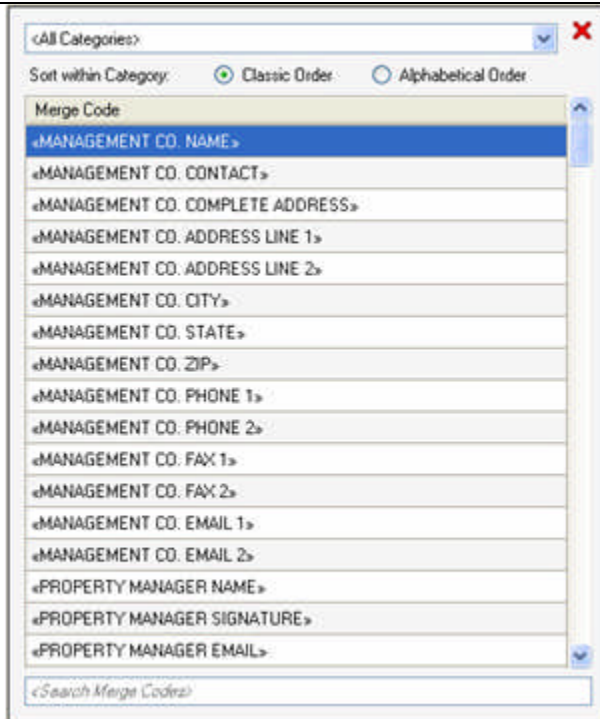
This next section on Form Letters discusses steps 3 – 5.

Notice the second row of Form Letter functions:



We'll review what each of these functions does.

	Use this button to open the Form Letter Selector where you can select another letter. If there have been changes made to the open Form Letter, it will prompt you to save the changes before it closes the letter.
	Use this button to Save changes made to the open Form Letter.
	Use this button to open the Merge Code Selector . It will look like this: Merge Code List



Clicking on a merge code will insert it into the Form Letter at the cursor position. Read more about Merge Codes later in this manual section.

Default Delivery:

Use this button to select the **Default Delivery** method for this Form Letter. This can be very handy when you wish a letter to be sent by Certified Mail or one of the other delivery methods available. Choose from among these Default Delivery methods.

- **Print** – will always print this letter for all owners selected.
- **Email** – will email this letter if an owner has “Opted-In” to receive email.
- **Print & Email** – will print this letter for those owners who have NOT “Opted-In” to receive email and email those owners who have “Opted-In”.
- **Certified Mail** – generates an electronic mail file that uploads to SouthData’s SignatureMail™® mailing system. You must have a SouthData account setup for each community where you wish to use this service.
- **Certified Mail + First Class** – generates an electronic mail file that uploads to SouthData’s SignatureMail™® mailing system. SouthData will then send this letter by certified mail with another copy of the letter sent by standard, first class mail. You must have a SouthData account setup for each community where you wish to use this service. Instructions for configuring the SignatureMail™® interface and creating a new SouthData account are included at the end of this manual section.
- **First Class Mail** – generates an electronic file that uploads to

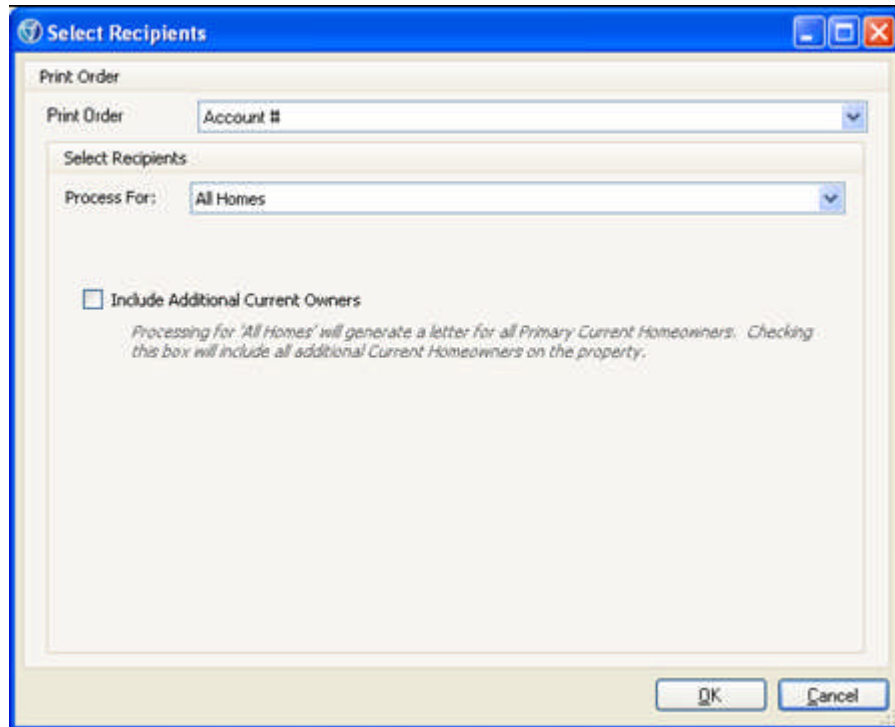
SouthData's SignatureMail™® mailing system. SouthData will then send this letter to the owners by standard, first class mail. You must have a SouthData account setup for each community where you wish to use this service.

Select the **Default Delivery** method for this letter. When you Generate Letters as described below, it will use this Delivery method for each of the Form Letters selected.

 **Generate Letters**

The **Generate Letters** function is the way letters are printed or sent to owners, based on the Delivery Method selected. You will see this screen for selecting the options for this batch of Form Letters:

Generate Form Letters



Notice you can select the Print Order and Select Recipients.

Print Order – select from these choices:

- Account #
- Lot/Unit #
- Street Address
- Owner Name (uses the Sort Name)
- Zip Code (for bulk mail discounts)

Select Recipients – select who gets letters from these choices:

- All Homes
- Range of Homes (select the starting and ending homes)
- Section/Building (select the Section or Building)
- Selected Homes (individually select homes)

Include Additional Current Owners You can checkmark this option to generate letters for additional owners, like secondary owner records, in addition to the Primary Owner.

OK – click this button to proceed with Generate Letters.

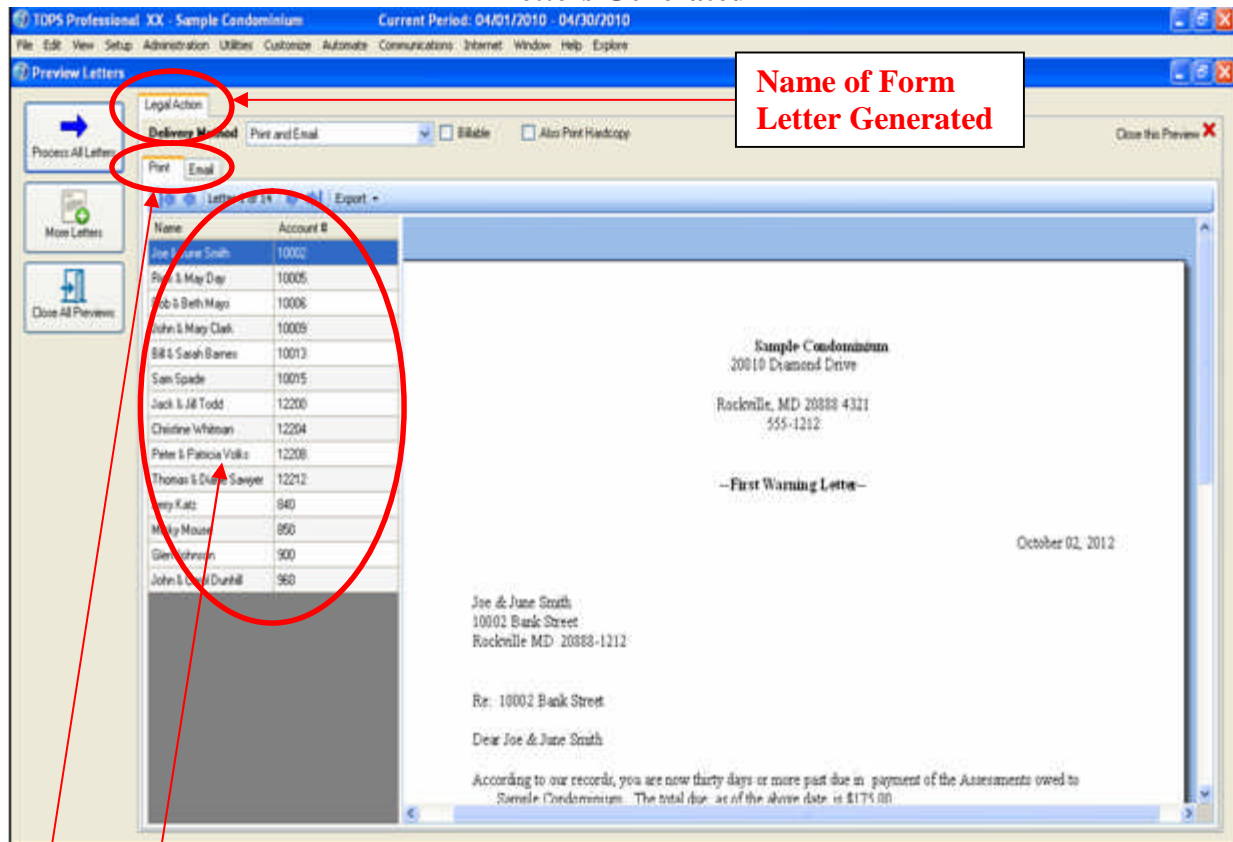
Cancel – click this button to exit from Generate Letters.

After clicking OK, you will see this screen showing it is Generating Letters according to the options you selected:



Once TOPS is done Generating Letters, it will display the letter and recipient list like this:

Letters Generated

A screenshot of the TOPS Professional software interface. The window title is "TOPS Professional XX - Sample Condominium" and the current period is "04/01/2010 - 04/30/2010". The interface shows a "Preview Letters" window. On the left, there is a table of recipients with columns for "Name" and "Account #". A red circle highlights this table. On the right, a preview of a letter is displayed. A red box with the text "Name of Form Letter Generated" points to the "Legal Action" dropdown menu in the top left of the preview window. The letter preview shows the address "Sample Condominium, 20010 Diamond Drive, Rockville, MD 20888 4311, 555-1212" and the subject "First Warning Letter". The date "October 02, 2012" is also visible. The letter content includes the recipient's name and address, and a message about a payment due.

Notice it shows the first letter generated in a preview display. It also shows the following:

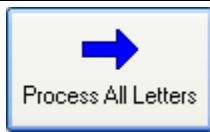
Recipients List – shows the list of recipients according to the Delivery Method.

Delivery Method – organizes the recipients into tab according to the Delivery Methods.

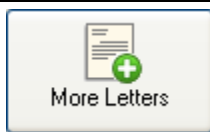
In the example shown above, it will print this form letter for a group of recipients and create an email with the letter attached for those owners who have “Opted-In” to receive email using TOPS iMail®.

Billable Checkmark the **Billable** option if this letter is a reimbursable expense to the management company. The number of letters generated will be recorded in the community’s Communication History is “Billable” so it can be included on a printed report showing all the Billable communications for a range of dates.

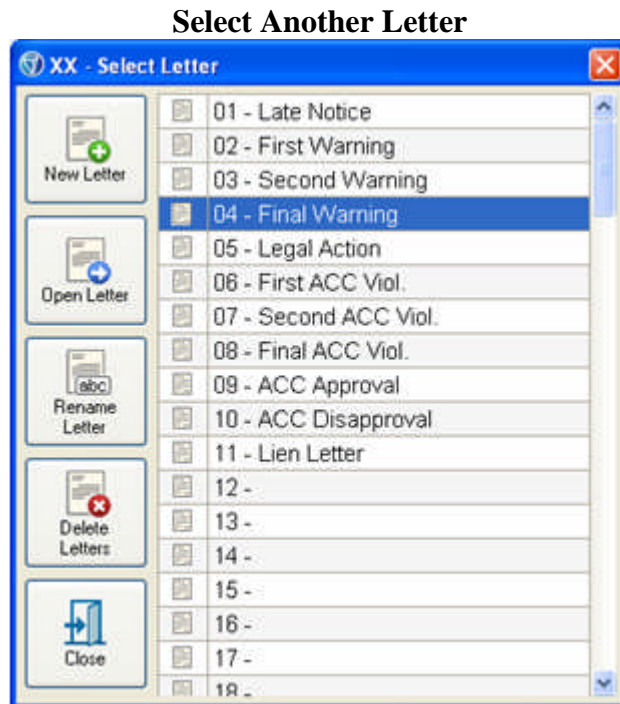
Also Print Hardcopy Checkmark the **Also Print Hardcopy** option to print a letter that was emailed or sent electronically to SouthData through their SignatureMail™ system. You can then take the hardcopy and send it or file it.



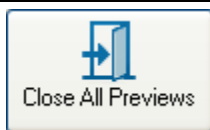
Click the **Process All Letters** button to proceed with creating the letter output – either printing, emailing or sending to SouthData through their SignatureMail™ system. Until you click Process All Letters and complete printing or sending the letters, the owner’s Communication History is not updated for these letters.



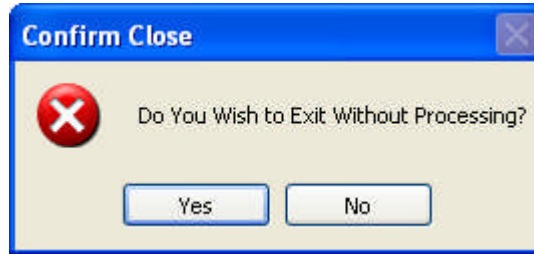
Click the **More Letters** button to select additional form letters to generate. It will take you back to the Form Letter Selector:



Select the additional Form Letter to generate and proceed through the same steps as described above. It will then add these additional letters to the ones already generated so you can Process them all at the same time.



Click the **Close All Previews** button to exit from Form Letter without processing the Form Letter for the owners listed. You will then see this warning message:



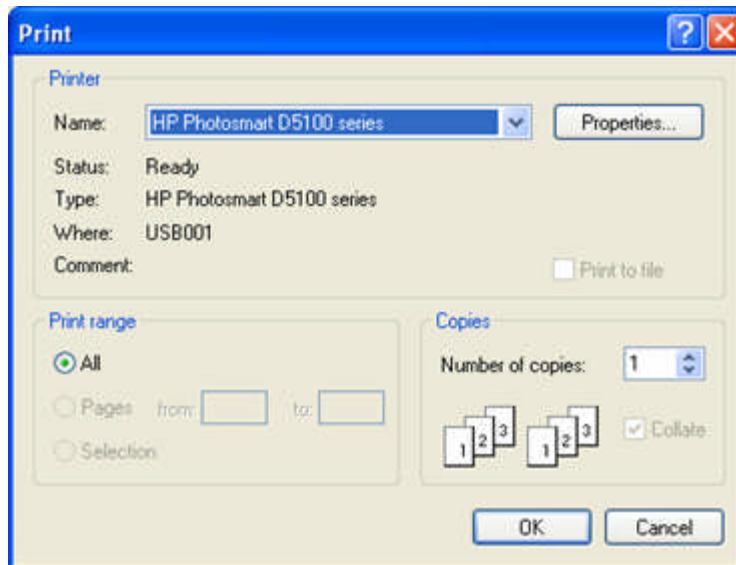
Yes – answer Yes if you wish to exit without doing the letter processing. It will leave the owners as pending if you wish to come back to finish processing these letters.

No – answer No if you wish to proceed with processing the letters.

Printing Letters

For printed letters, when you click “Process All Letters”, you will see the printer selection:

Printer Selection



It will show the default printer for your computer, but you can select a different printer if you have others available.

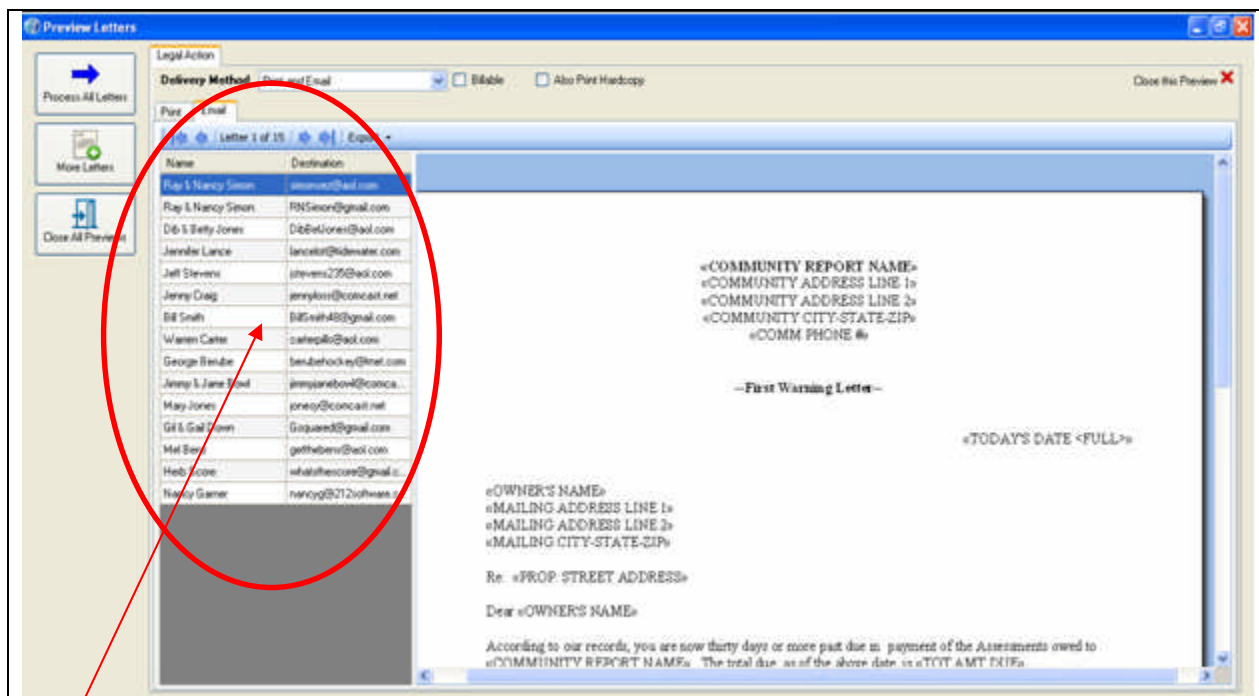
OK – click OK to proceed with the letter printing to the selected printer. When it is done printing the letters, it will update the Communication History for those owners.

Cancel – click Cancel to exit from the letter printing. The letters will still be generated, but will not update the Communication History for those owners until they are Processed.

Emailing Letters

If emailing a Form Letter to owners, you will see the Email tab and below it a list of those owners who will be receiving the emailed letter.

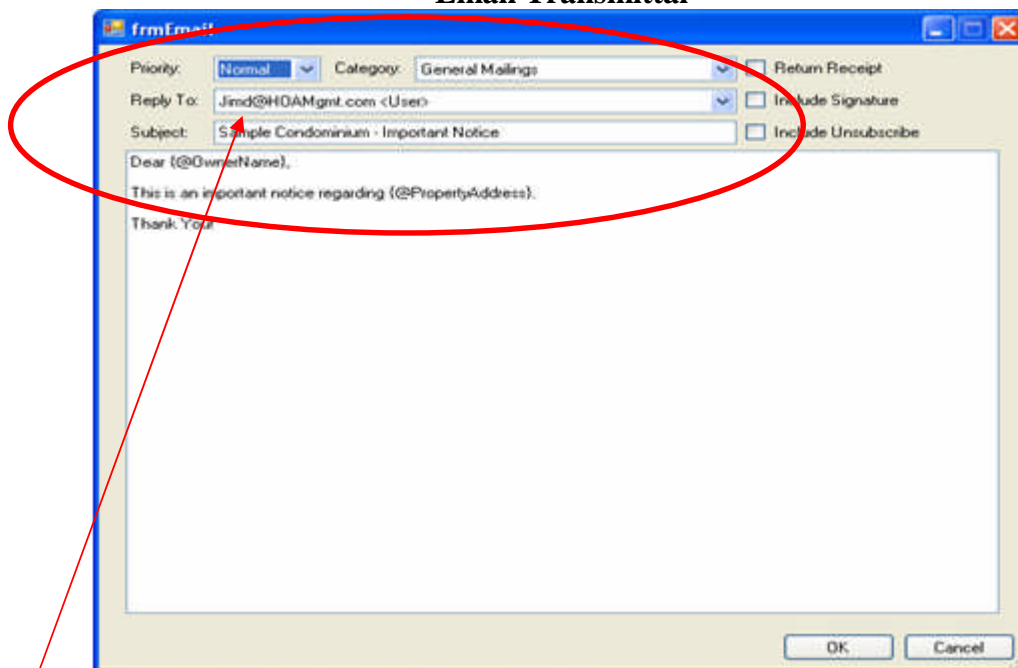
Emailed Letters



Email Recipients – lists those owners who have “Opted-In” to receive an email with this Form Letter attached.

If you choose to email form letters to an owner(s), you will see the default email transmittal with the form letter attached like this:

Email Transmittal



Email Options

Notice these email options at the top of the above screen:

Priority – the default is *Normal*, but you may also select *Low* or *High*.

Category – You can change the category if you wish using the down browse arrow. The

choices are:

- General Mailings
- Letters & Notices
- Bills & Statements

Depending on where you are working with Form Letter, it will apply what should be the correct category. For example, if you are generating Form Letters through Collection Action on the AR Menu, it will categorize the letters in the “Letters & Notices” category.

Reply To – use the down browse arrow to select a different return email address.

Subject – you may change the default to a Subject that more closely describes the Form Letter being sent if you wish. Simply type over the Subject to change it.

Return Receipt Checkmark if you wish to get a **Return Receipt** from the owner meaning they acknowledge they got the email and opened it. The Return Receipt will be sent to the Reply To address.

Include Signature Checkmark if you wish to include your signature on the email transmittal. Your email signature comes from Communications > Configure TOPS iMail > User Settings Preferences > Edit My Signature.

Include Unsubscribe Checkmark if you wish to include a link for the owner to **Unsubscribe** to receiving future Letters by email.

OK – click **OK** when the email transmittal is setup the way you wish. The Form Letter will be generated for each owner and attached to this email transmittal. The Communication History will be updated for these owners.

Cancel – click **Cancel** to erase any changes made to the email transmittal. It will exit you from the email transmittal screen. It will not update the Communication History for these owners until the emails are processed.

Certified & Electronic Mail

TOPS offers the ability to generate Certified and First Class Mail electronically through SouthData’s SignatureMail™ and CertMail™ system. This has many time saving advantages, such as, eliminating the need to fill out certified mail forms, take mail to the Post Office, file hardcopy letters in the Owner’s file, and attach delivery receipts to filed hardcopy letters.

In order to send Certified and First Class Mail electronically through SouthData, each community will need a SouthData customer account #. You can setup the account at:

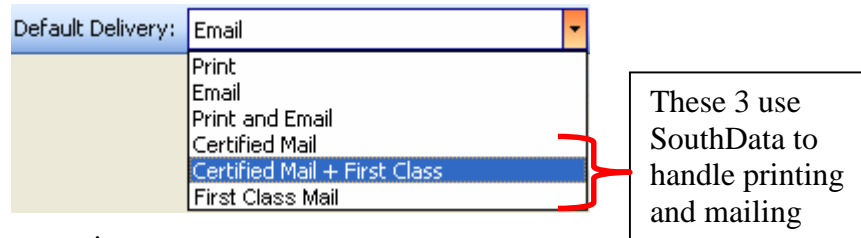
<http://www.southdata.com/>

Use the “Getting Started” menu choice on their home page to setup the required account. Detailed instructions for configuring the SignatureMail™ and CertMail™ interface and creating a new SouthData account are included at the end of this manual section.

To send any letter Certified or First Class Mail using SouthData's Signature/CertMail™ system, start in the Form Letter you want to send Certified and follow these steps:

Delivery Method

Click the Delivery Method button with the Form Letter open you wish to send Certified or by SouthData First Class mail. You will see these Delivery options:



Select one of these Delivery options:

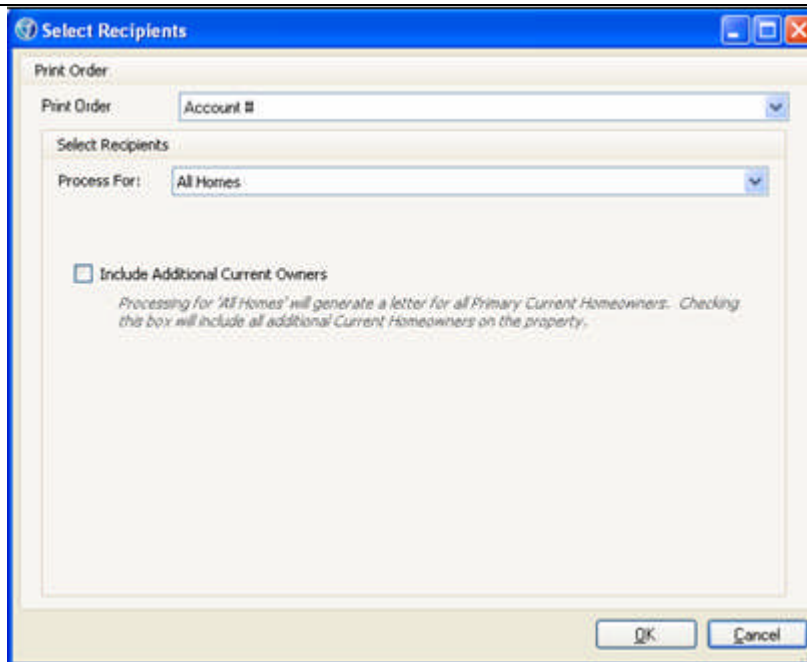
- **Certified Mail** – sends the letter through the Post Office using Certified Mail with a return receipt. You will get the return receipt electronically from SouthData when the mail is delivered to complete the proof of delivery.
- **Certified Mail + First Class** – sends the letter as above but also sends a second copy of the letter by First Class Mail through the Post Office. This makes sure that, if the owner refuses to sign the Certified Mail receipt when delivered, that you have also delivered the letter by regular first class mail which should provide delivery.
- **First Class Mail** – sends the letter by regular First Class Mail through the Post Office.

In each of the cases above where you are using SouthData to send the mail to an owner, you are electronically transmitting a copy of the letter exactly as it looks with the owner information filled in through the Merge Codes so each letter is complete. If you have letterhead in the letter header, the letterhead will be included. SouthData will then print each letter EXACTLY as received and send by one of the 3 delivery options above.

Generate Letters

Once you have selected the Delivery option, the next step is to click the Generate Letters button. This step actually produces each letter. You will see this screen for selecting the print order and also which owners get the letter.

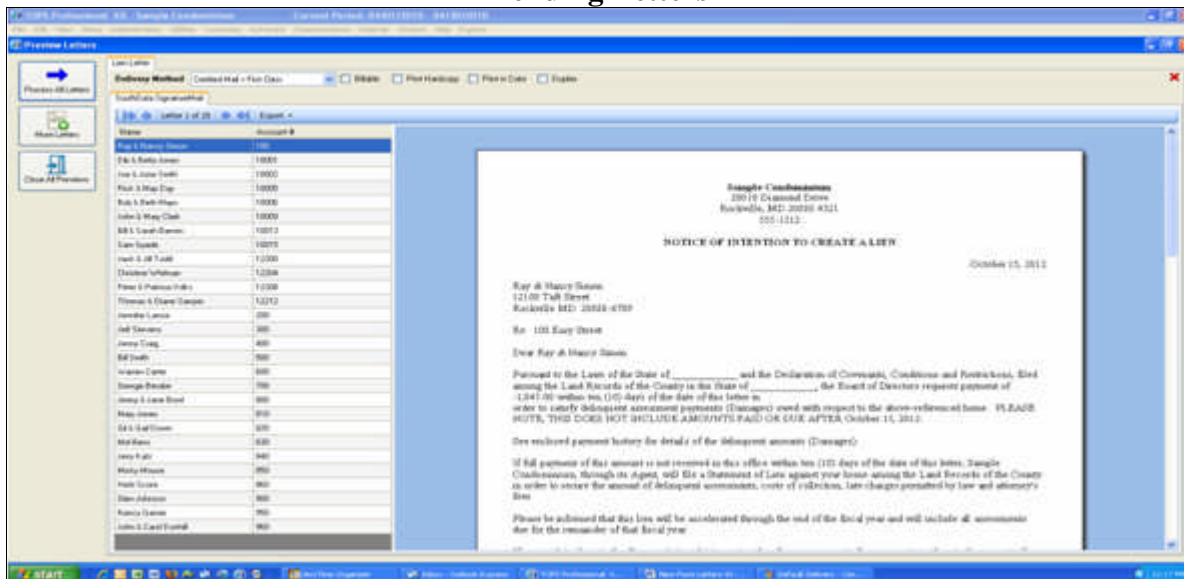
Generate Form Letters



Select the Print Order, then select the Recipients. If these are Collection Letters in the AR Module or Violation Letters from the CCR Module and you are using the automatic actions in these modules, you will not need to select the Recipients, they will be found for you as you categorize the owners into the action steps.

Once the Form Letter has been generated, you will see this screen showing the results:

Pending Letters



Notice it lists the Recipients on the left side next to the Form Letter. This is so you can review the list to make sure it is complete.

There are some options above the Form Letter that should be noted:



Billable – checkmark this box if this mailing is going to be billed to the community. It will then be recorded in the Communication History as “Billable” so you can print a report to back-

up charging the community for the mailing.

Print Hardcopy – checkmark this box if you wish to print a copy of the letter in-house even though you are sending it to SouthData for printing and mailing.

Print in Color – checkmark this box if you wish SouthData to print this letter in color, such as, if you have colored letterhead. There is an extra charge from SouthData for color printing.

Duplex – checkmark this box if your letter has multiple pages for each owner and you wish SouthData to print the letters back-to-back so it saves on the printing charges.

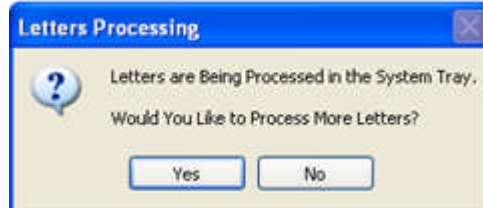
Process All Letters

The final step after selecting the Recipients and the Delivery Method is to “*Process*” the Form Letter.



Click the **Process All Letter** button.

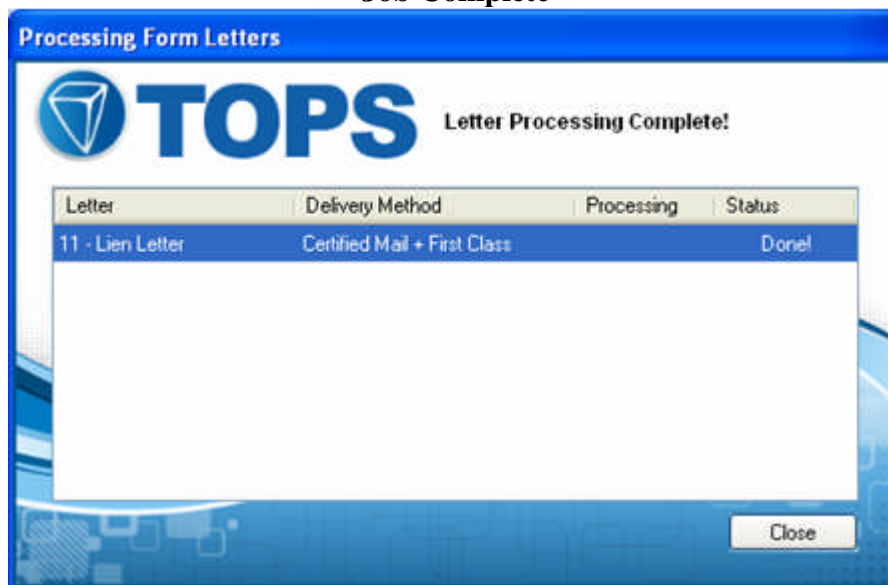
As it is processing the letters and getting them ready to transmit to SouthData, you will see this message:



If you want to select another letter to either print, email or send through SouthData, then answer Yes. If you are done with generating letters, answer No.

Lastly, you will see this confirming message showing that your Form Letter job is complete and sent to SouthData for printing and mailing:


Job Complete



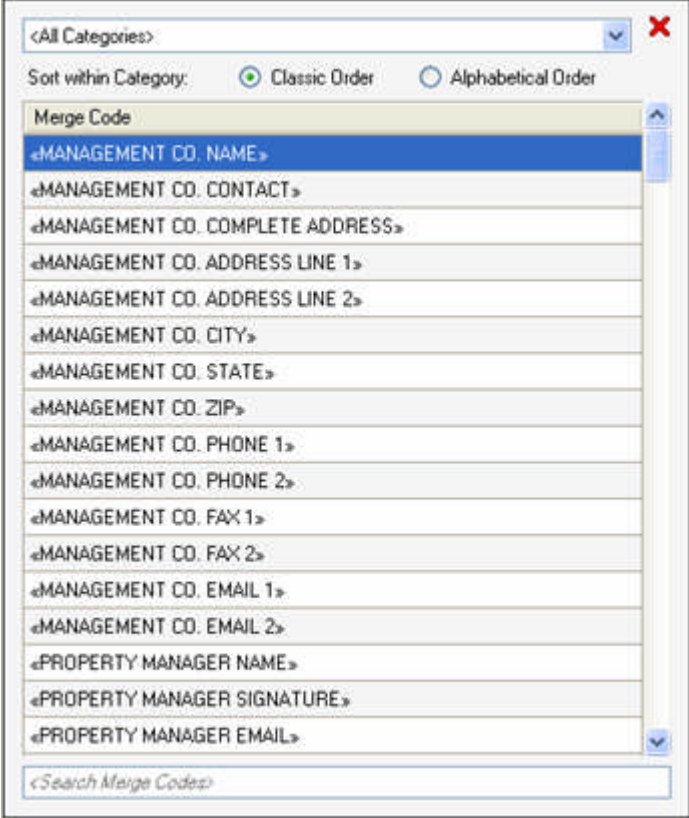
When the Status is **Done**, click the **Close** button to clear this message and exit the job QUE..


This completes the steps for sending a printing and mailing job to SouthData.

Merge Code Overview

Notice the Merge Codes button  at the top of the Form Letter screen below the File toolbar. Place the cursor where you wish to insert a Merge Code into the Form Letter, then click the Merge Code button. The Merge Code browser will open like this:

Merge Code List



<All Categories> 

Sort within Category: Classic Order Alphabetical Order

Merge Code

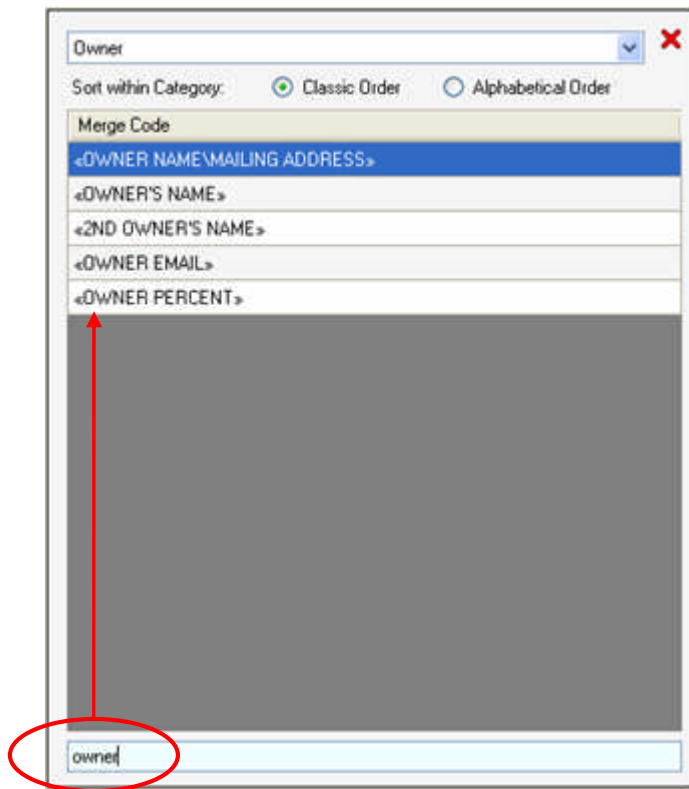
- «MANAGEMENT CO. NAME»
- «MANAGEMENT CO. CONTACT»
- «MANAGEMENT CO. COMPLETE ADDRESS»
- «MANAGEMENT CO. ADDRESS LINE 1»
- «MANAGEMENT CO. ADDRESS LINE 2»
- «MANAGEMENT CO. CITY»
- «MANAGEMENT CO. STATE»
- «MANAGEMENT CO. ZIP»
- «MANAGEMENT CO. PHONE 1»
- «MANAGEMENT CO. PHONE 2»
- «MANAGEMENT CO. FAX 1»
- «MANAGEMENT CO. FAX 2»
- «MANAGEMENT CO. EMAIL 1»
- «MANAGEMENT CO. EMAIL 2»
- «PROPERTY MANAGER NAME»
- «PROPERTY MANAGER SIGNATURE»
- «PROPERTY MANAGER EMAIL»

<Search Merge Codes>

Locate the Merge Code you wish to insert. There are two ways to locate a Merge Code:

Search

Use the Search Merge Code function at the bottom of the Merge Code list. Simply start typing what merge code you are looking for to narrow the list of results like this:

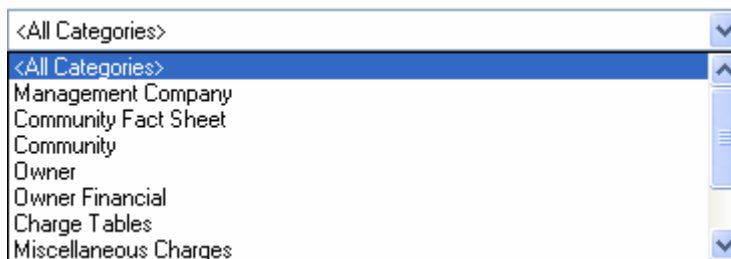


Merge Code Categories

Use the Merge Code categories option to help you narrow your search:



By default, ALL Merge Codes are displayed. But to make them more manageable so you can easily find the Merge Code you want to insert into a form letter, use the down browse arrow to open up the Merge Code Categories like this:



The following is a complete list of the Merge Code Categories:

- Management Company
- Community Fact Sheet
- Community
- Owner
- Owner Financial
- Charge Tables
- Miscellaneous Charges
- Flex Data

- CC&R
- Miscellaneous

Select the Merge Code Category to see just those Merge Codes to select from.

The Merge Codes inserted into letter templates are bracketed abbreviations of the Merge Code name, like this:

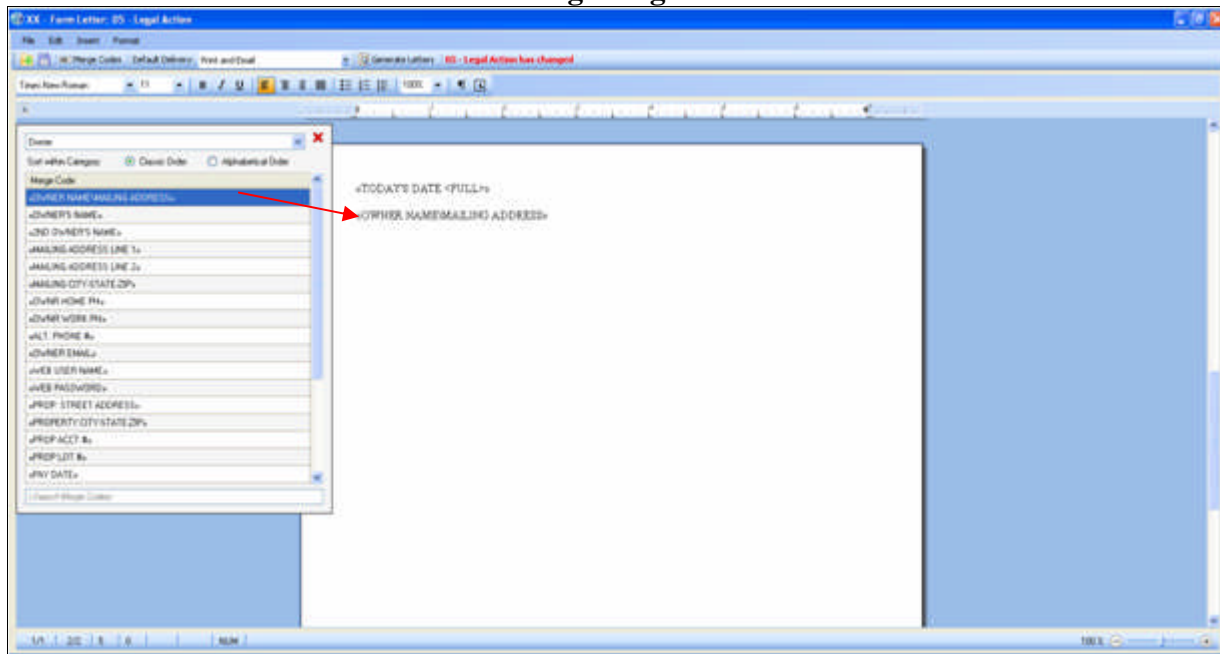
Owners Name <<Owner's Name>>

See the example below showing how Merge Codes are inserted into Form Letter templates.

Inserting Merge Codes

Merge Codes are inserted into the Form Letter at the cursor position like this:

Inserting Merge Codes



Double click on the Merge Code you wish to insert it into the Form Letter at the cursor position. The Merge Codes inserted into letter templates are bracketed abbreviations of the Merge Code name, like this:

Owners Name/Mailing Address <<Owner's Name\Mailing Address>>

Merge Code Effects

You can have Merge Codes print with the same effects as the regular letter text. The means you can have Merge Codes print with these effects:

- Font Size & Style
- Bold
- Italics
- Alignment (left, center, right, justified)

We'll list all the available Merge Codes in detail below.

Collection Letter--Template

«COMMUNITY REPORT NAME»
«COMMUNITY ADDRESS LINE 1»
«COMMUNITY ADDRESS LINE 2»
«COMMUNITY CITY-STATE-ZIP»
«COMM PHONE #»

--FIRST WARNING LETTER--

«TODAY'S DATE <FULL>»

«OWNERS NAME»
«MAILING ADDRESS LINE 1»
«MAILING ADDRESS LINE 2»
«MAILING CITY-STATE-ZIP»

Re: «PROP. STREET ADDRESS»

Dear «OWNER'S NAME»

According to our records, you are now thirty days or more past due in payment of the Assessments owed to «COMMUNITY REPORT NAME». The total due, as of the above date, is «TOT AMT DUE».

A Late Notice was sent to you previously in case you had overlooked making payment to the Community. Now we must request that you make immediate payment of the above amount.

The Community's legal documents (Declaration of Covenants), which you agreed to abide by when you purchased your home, requires prompt payment of Assessments or the Community has the authority to enforce collection through various legal means including filing a Lien against your home. We do not wish to take collection action but your continued delay in paying the Assessment may force us to do so.

If there is a reason that you are withholding payment or if you are experiencing some financial hardship, please contact our office above to discuss the matter. If you do not make immediate payment or contact our office to discuss the matter, we will follow the collection procedure approved by «COMMUNITY REPORT NAME».

We urge you to make full payment immediately or contact this office to avoid further collection action.

Sincerely,

Agent for
«COMMUNITY REPORT NAME»

Collection Letter--Printed

Sample Condominium
20010 Diamond Drive
Rockville MD 20888-1212
301-555-1212

--FIRST WARNING LETTER--

June 29, 2009

Jenny Craig
11500 E. Lake Drive
Chicago IL 60105

Re: 400 Easy Street

Dear Jenny Craig:

According to our records, you are now thirty days or more past due in payment of the Assessments owed to Sample Condominium. The total due, as of the above date, is **\$190.00**.

A Late Notice was sent to you previously in case you had overlooked making payment to the Community. Now we must request that you make immediate payment of the above amount.

The Community's legal documents (Declaration of Covenants), which you agreed to abide by when you purchased your home, requires prompt payment of Assessments or the Community has the authority to enforce collection through various legal means including filing a Lien against your home. We do not wish to take collection action but your continued delay in paying the Assessment may force us to do so.

If there is a reason that you are withholding payment or if you are experiencing some financial hardship, please contact our office above to discuss the matter. If you do not make immediate payment or contact our office to discuss the matter, we will follow the collection procedure approved by Sample Condominium.

We urge you to make full payment immediately or contact this office to avoid further collection action.

Sincerely,

Agent for
Sample Condominium

We'll list all the Merge Codes by category starting on the next page.

Merge Code List

Management Company

These Merge Codes pull information from the Management Company File:

Management Company Info

Description	Merge code	Sample
Management Co. Name	<<MANAGEMENT CO. NAME>>	Management Company Inc.
Management Co. Contact	<<MANAGEMENT CO. CONTACT>>	President
Management Co. Complete Address	<<MANAGEMENT CO. COMPLETE ADDRESS>>	12001 N 102 nd Street Suite 100 Phoenix, AZ 85003
Management Co. Address Line 1	<<MANAGEMENT CO. ADDRESS LINE 1>>	12001 N 102 nd Street
Management Co. Address Line 2	<<MANAGEMENT CO. ADDRESS LINE 2>>	Suite 100
Management Co. City	<<MANAGEMENT CO. CITY>>	Phoenix
Management Co. State	<<MANAGEMENT CO. STATE>>	AZ
Management Co. Zip	<<MANAGEMENT CO. ZIP>>	85003
Management Co. Phone 1	<<MANAGEMENT CO. PHONE 1>>	602-999-8888
Management Co. Phone 2	<<MANAGEMENT CO. PHONE 2>>	602-555-4444
Management Co. Fax 1	<<MANAGEMENT CO. FAX 1>>	602-777-8888
Management Co Fax 2	<<MANAGEMENT CO. FAX 2>>	602-999-8881
Management Co. Email 1	<<MANAGEMENT CO. EMAIL 1>>	xyx@communitymanagement.com
Management Co. Email 2	<<MANAGEMENT CO. EMAIL 2>>	abc@communitymanagement.com

Community Fact Sheet

These Merge Codes pull information from the Community Fact Sheet file:

Community Fact Sheet

Description	Merge code	Sample
Property Manager Name	<<PROPERTY MANAGER NAME>>	Joe Manager
Property Manager Signature	<<PROPERTY MANAGER SIGNATURE>>	
Property Manager Email	<<PROPERTY MANAGER EMAIL>>	jmanager@communitymanagement.com
Property Manager Home #	<<PROPERTY MANAGER HOME #>>	602-897-8887
Monthly Meeting Date	<<MONTHLY MEETING DATE>>	1 st Tuesday of each month
Common Area Responsibility	<<COMMON AREA RESPONSIBILITY>>	Common area grass maintenance, parking lot lights, snow removal, Tot Lot, Pool
What Association Fees Cover	<<WHAT ASSOCIATION FEES COVER>>	Common Area Maintenance, Street Repair
Nearest cross Street/Intersection	<<NEAREST CROSS STREET/INTERSECTION>>	Happy Valley Rd and Jomax
Directions to Community	<<DIRECTIONS TO COMMUNITY>>	From I-17 take first right
Community Access Info	<<COMMUNITY ACCESS INFORMATION>>	Type 1234 on the security key pad
Late Payment Policy	<<LATE PAYMENT POLICY>>	Payments received after the 15 th are subject to a 10% Late Fee.
Screening/Orientation Policy	<<SCREENING/ORIENTATION>>	Prospective purchasers must meet

	POLICY>>	with the Board of Directors prior to settlement for a community orientation.
Architectural Approval Policy	<<ARCHITECTURAL APPROVAL POLICY>>	45 days or disapproved
Leasing Policy	<<LEASING POLICY>>	Copies of the lease must be sent to the management office. The lease must state that renters are subject to all community Rules & Regulations.
Violation Policy	<<VIOLATION POLICY>>	The community has the right to enforce architectural violations and violations of the Rules & Regulations. Fines are levied for non-compliance to the community Rules & Regulations.

Community

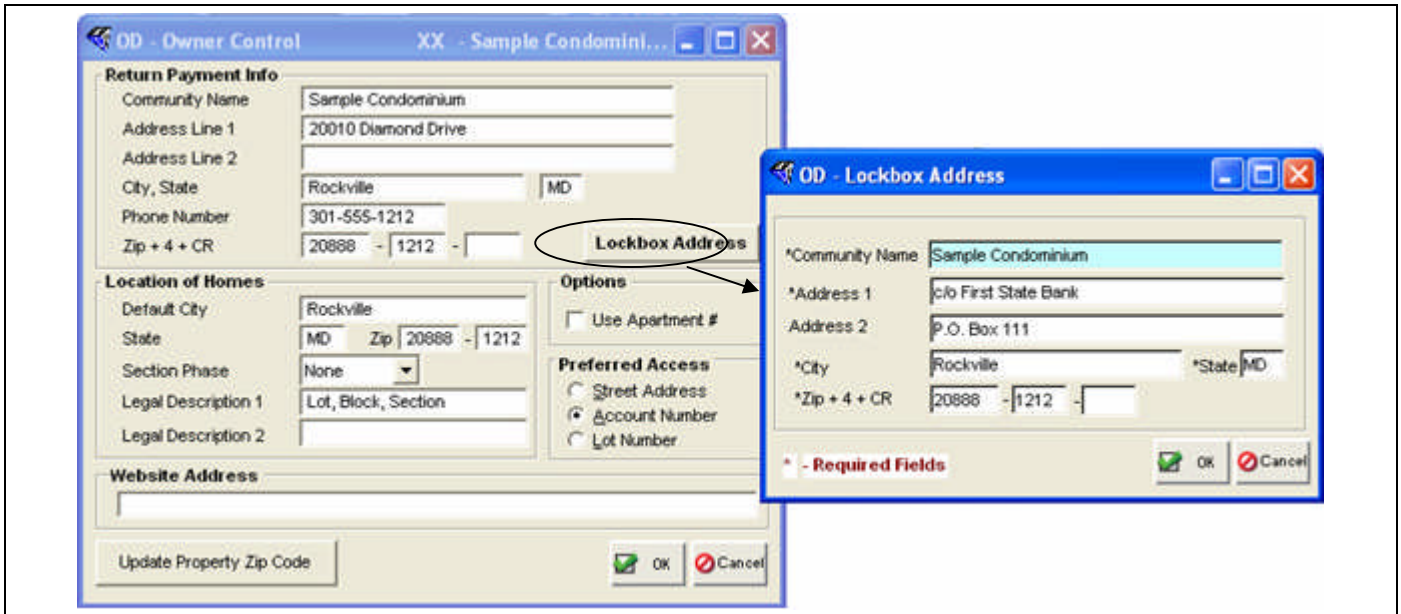
These Merge Codes pull information from the Community File and Owner Control File:

Community File

Description	Merge code	Sample
Community ID	<<COMMUNITY ID>>	C01
Community Report Name	<<COMMUNITY REPORT NAME>>	Circle Community Ranch HOA
Community Display Name	<<COMMUNITY DISPLAY NAME>>	Circle Community Ranch
Community Address Line 1	<<COMMUNITY ADDRESS LINE 1>>	P.O. Box 777
Community Address Line 2	<<COMMUNITY ADDRESS LINE 2>>	optional second line of address
Community City-State-Zip Code	<<COMMUNITY CITY-STATE-ZIP>>	Phoenix, AZ 85302
Community Phone Number	<<COMM PHONE #>>	602-999-8888

The following Merge Codes pull info from the Owner Control File:

Owner Control File



Lockbox Community Name	<<LOCKBOX COMMUNITY NAME>>	Sample Condominium
Lockbox Address 1	<<LOCKBOX ADDRESS 1>>	c/o First State Bank
Lockbox Address 2	<<LOCKBOX ADDRESS 2>>	Bank address 2
Lockbox CSZ	<<LOCKBOX CSZ>>	Rockville MD 20888-1212
Other Community Name	<<OTHER COMMUNITY NAME>>	Sample Condominium (from Owner Control File)
Other Address 1	<<OTHER ADDRESS 1>>	20010 Diamond Drive (from Owner Control File)
Other Address 2	<<OTHER ADDRESS 2>>	Will be skipped in the form letter if blank.
Other CSZ	<<OTHER CSZ>>	Rockville MD 20888 -1212 (from Owner Control File)
Community Web Site	<<COMMUNITY WEB SITE>>	Address for community website

Owner

These Merge Codes pull information from the Property & Owner data:

Owner Info

The screenshot displays a software window titled "OO - Maintain owners" for "CCR - Circle Community Ranch". The interface includes a toolbar with icons for navigation and actions like Add, Property, History, Charges, Letters, Notes, Flex Data, Flags, Owner Recall, CCR, Web Ord, and Print. The main area is divided into several sections:

- Select Property, F4 - Browse:** Fields for Account # (1001), Lot/Unit (001), and Street (123 Happy Valley Road). Buttons for Street Address (F2) and Name Search (F5) are present.
- Select Owner:** Fields for Owner (Sally Smith, SMITH) and 2nd Owner.
- Alt. Mailing Addr.:** Fields for Address 1, Address 2, City, State, Zip Code, and Carrier. Checkboxes for Use Alt, Foreign Addr, and 2nd Alt. Addr are also visible.
- Multiple Owners:** Record Type (Owner) and Record # (001).
- Status:** Balance (50.00), Notes (NO), Collection, Hold Action, Settled Date, and Move Out.
- Contact Info.:** Home (602-111-1111), Work (602-222-2222), and Alt (602-333-3333) phone numbers. Unlisted checkboxes, Fax, Disable Web Interface?, and E-Mail (ssmith@cox.net) fields are included.

 At the bottom, there are Mort. Co (000) and Owner (1 of 1 for this home) fields, along with OK, Cancel, Delete, and Close buttons.

Description	Merge code	Sample
Owner Name/Mailing Address	<<OWNER NAME/MAILING ADDRESS>>	Sally Smith 123 Happy Valley Road Happy Valley, AZ 85302
Owner's Name	<<OWNER'S NAME>>	Sally Smith
2nd Owner's Name	<<2ND OWNER'S NAME>>	display name 2 if used
Owner Mailing Address Line 1	<<MAILING ADDRESS LINE 1>>	123 Happy Valley Road
Owner Mailing Address Line 2	<<MAILING ADDRESS LINE 2>>	Will be skipped if field not used in owner address
Owner Mailing City-State-Zip	<<MAILING CITY-STATE-ZIP>>	Happy Valle, AZ 85302
Home Phone #	<<OWNR HOME PH>>	602-111-1111
Owner Work Phone #	<<OWNR WORK PH>>	602-222-2222
Alt. Phone #	<<ALT. PHONE #>>	602-333-3333
Owner Email Address	<<OWNER EMAIL>>	johnsmith45@aol.com
TOPS Web Site User Name	<<WEB USER NAME>>	Johnjsmith45
TOPS Web Site Password	<<WEB PASSWORD>>	10johnsy10
Property Street Address	<<PROP. STREET ADDRESS>>	123 Happy Valley Road

Property City-State-Zip	<<PROPERTY CITY-STATE-ZIP>>	Happy Valle, AZ 85302
Property Account #	<<PROP ACCT #>>	1001
Property Lot #	<<PROP LOT #>>	001
Owner's Last Payment Date	<<PAY DATE>>	04/05/07
Property Assessed Value	<<PROP. ASSESSED VALUE>>	\$265,000
Property GL Cost Center	<<PROPERTY G/L COST CENTER>>	200
Last Recurring Charge Date	<<LAST ASSESSMENT DATE>>	04/01/07
Percent of Ownership	<<OWNER PERCENT>>	.0147
Legal Description 1	<<LEGAL DESCRIPTION 1>>	Plat Book 7, Section 8, Lot 001
Legal Description 2	<<LEGAL DESCRIPTION 2>>	Optional
Building\Section\Phase #	<<SEC#>>	5
List All Outstanding CC&R Violations	<<OUTSTANDING CCR VIOLATIONS ALL>>	Lists them all in a letter

Owner Financial

These Merge Codes calculate owner balance breakdowns from the payment history files:

Owner Balances

Prepaid Balance		
		0.00
Bal Due:		
A1	Maintenance Fee	180.00
01	Late Fees	10.00
	TOTAL	190.00

Description	Merge code	
Itemized Balances - Not Including Prepaid	<<ITEMIZED BALANCES-NOT INCLUDING PREPAID>>	Itemizes the owner balances but excludes any Prepaid Credit balance.
Itemized Balances - Including Prepaid	<<ITEMIZED BALANCES-INCLUDING PREPAID>>	Itemizes the owner balances but includes any Prepaid Credit balance.
A1 Balance Due - simple	<<A1 DUE>>	These 4 codes are designed to be used together for a simple owner balance breakdown
Late Fee Due - simple	<<LATE FEE DUE>>	
Total Other Charges Due – simple (this code calculates the difference between the TOTAL AMOUNT DUE and the A1 & Late Fee balances)	<<OTHER CHARGES (SIMPLE).>>	
TOTAL AMOUNT DUE	<<TOT AMT DUE>>	
Prepaid (Credit) Balance	<<PREPAID (CREDIT) AMT>>	
Totals All Itemized Balances Into a Total Due	<<TOTAL ITEMIZED.>>	Totals All Itemized Balances Into a Total Due
A “plug” figure to make sure your itemized balances add to the Total Due merge code	<<OTHER CHARGES (PLUS DIFFERENCE)>>	

Place a + sign after any Merge Code that pulls an owner balance or charge amount to activate the accumulator so that you can calculate a total due using the following Sub-Total levels. There are 8 Sub-Total levels available so you can construct the breakdowns of owner balances and total them however you wish.

1st subtotal of +'s	<<1 ST SUBTOT +>>	<p>Used with the Subtotals below to make sure the Merge Codes itemizing owner balances added to the TOTAL OF SUBTOTALS below.</p> <p>Example –</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><<A1 DUE>>+</td> <td style="text-align: right;">60.00</td> </tr> <tr> <td><<C1 DUE>>+</td> <td style="text-align: right;">25.00</td> </tr> <tr> <td><<C3 DUE>>+</td> <td style="text-align: right;">30.00</td> </tr> <tr> <td><<MISC CHG. (01)>>+</td> <td style="text-align: right;">6.00</td> </tr> <tr> <td><<MISC CHG. (04)>>+</td> <td style="text-align: right;">3.85</td> </tr> <tr> <td><<MISC CHG. (05)>>+</td> <td style="text-align: right;">125.00</td> </tr> <tr> <td style="border-top: 1px solid black;"><<OTHER CHGS (PLUS DIFF)>></td> <td style="text-align: right; border-top: 1px solid black;">13.00</td> </tr> <tr> <td style="border-top: 1px solid black;"><<TOT ALL SUB>></td> <td style="text-align: right; border-top: 1px solid black;">259.85</td> </tr> </table>	<<A1 DUE>>+	60.00	<<C1 DUE>>+	25.00	<<C3 DUE>>+	30.00	<<MISC CHG. (01)>>+	6.00	<<MISC CHG. (04)>>+	3.85	<<MISC CHG. (05)>>+	125.00	<<OTHER CHGS (PLUS DIFF)>>	13.00	<<TOT ALL SUB>>	259.85
<<A1 DUE>>+	60.00																	
<<C1 DUE>>+	25.00																	
<<C3 DUE>>+	30.00																	
<<MISC CHG. (01)>>+	6.00																	
<<MISC CHG. (04)>>+	3.85																	
<<MISC CHG. (05)>>+	125.00																	
<<OTHER CHGS (PLUS DIFF)>>	13.00																	
<<TOT ALL SUB>>	259.85																	
2nd subtotal of +'s	<<2 ND SUBTOT +>>																	
3 rd subtotal of +'s	<<3 RD SUBTOT +>>																	
4 th subtotal of +'s	<<4 TH SUBTOT +>>																	
5 th subtotal of +'s	<<5 TH SUBTOT +>>																	
6 th subtotal of +'s	<<6 TH SUBTOT +>>																	
7 th subtotal of +'s	<<7 TH SUBTOT +>>																	
8 th subtotal of +'s	<<8 TH SUBTOT +>>																	
Totals of All Subtotals 1 – 8 or any merge codes with a + that are NOT in a Subtotal	<<TOT ALL SUBS>>	Totals all the +'s or all the Subtotal levels 1 – 8.																

Charge Tables

These Merge Codes pull information from the Charge Tables:

Charge Tables

Description	Merge code	Sample
A1 Balance Due	<<A1 BALANCE DUE>>	Accumulated total for owner A1 charge
A1 Charge Table Name	<<A1 CHARGE NAME>>	Maintenance Fee
A1 Charge Description	<<A1 CHARGE DESC>>	Duplex
A1 Charge Table Amount	<<A1 CHARGE AMT>>	60.00
A1 Late Fee Charge	<<LAT FEE AMT>>	5.00
C1 Balance Due	<<C1 BALANCE DUE>>	
C1 Charge Table Name	<<C1 CHARGE NAME>>	
C1 Charge Description	<<C1 CHARGE DESC>>	
C1 Charge Table Amount	<<C1 CHARGE AMT>>	
C1 Late Fee Charge	<<C1 LATE FEE AMT>>	
C2 Balance Due	<<C2 BALANCE DUE>>	

C2 Charge Table Name	<<C2 CHARGE NAME>>	
C2 Charge Description	<<C2 CHARGE DESC>>	
C2 Charge Table Amount	<<C2 CHARGE AMT>>	
C2 Late Fee Charge	<<C2 LATE FEE AMT>>	
C3 Balance Due	<<C3 BALANCE DUE>>	
C3 Charge Table Name	<<C3 CHARGE NAME>>	
C3 Charge Description	<<C3 CHARGE DESC>>	
C3 Charge Table Amount	<<C3 CHARGE AMT>>	
C3 Late Fee Charge	<<C3 LATE FEE AMT>>	
C4 Balance Due	<<C4 BALANCE DUE>>	
C4 Charge Table Name	<<C4 CHARGE NAME>>	
C4 Charge Description	<<C4 CHARGE DESC>>	
C4 Charge Table Amount	<<C4 CHARGE AMT>>	
C4 Late Fee Charge	<<C4 LATE FEE AMT>>	
C5 Balance Due	<<C5 BALANCE DUE>>	
C5 Charge Table Name	<<C5 CHARGE NAME>>	
C5 Charge Description	<<C5 CHARGE DESC>>	
C5 Charge Table Amount	<<C5 CHARGE AMT>>	
C5 Late Fee Charge	<<C5 LATE FEE AMT>>	
C6 Balance Due	<<C6 BALANCE DUE>>	
C6 Charge Table Name	<<C6 CHARGE NAME>>	
C6 Charge Description	<<C6 CHARGE DESC>>	
C6 Charge Table Amount	<<C6 CHARGE AMT>>	
C6 Late Fee Charge	<<C6 LATE FEE AMT>>	
C7 Balance Due	<<C7 BALANCE DUE>>	
C7 Charge Table Name	<<C7 CHARGE NAME>>	
C7 Charge Description	<<C7 CHARGE DESC>>	
C7 Charge Table Amount	<<C7 CHARGE AMT>>	
C7 Late Fee Charge	<<C7 LATE FEE AMT>>	

C8 Balance Due	<<C8 BALANCE DUE>>	
C8 Charge Table Name	<<C8 CHARGE NAME>>	
C8 Charge Description	<<C8 CHARGE DESC>>	
C8 Charge Table Amount	<<C8 CHARGE AMT>>	
C8 Late Fee Charge	<<C8 LATE FEE AMT>>	
C9 Balance Due	<<C9 BALANCE DUE>>	
C9 Charge Table Name	<<C9 CHARGE NAME>>	
C9 Charge Description	<<C9 CHARGE DESC>>	
C9 Charge Table Amount	<<C9 CHARGE AMT>>	
C9 Late Fee Charge	<<C9 LATE FEE AMT>>	

Miscellaneous Charges

These Merge Codes pull information from the Misc. Charges Table:

Misc. Charges Table

Charge Code	Description	GL Acct. #	Description
01	Late Fees	6340-000	Late Fee Income
		1340-000	Late Fees Receivable
02	NSF charges	6380-000	Owner Admin. Fees Income
		1380-000	Owner Admin. Fees Receiv.
03	Admin. Fees	6380-000	Owner Admin. Fees Income
		1380-000	Owner Admin. Fees Receiv.
04	Interest	6390-000	Owner Interest Income
		1390-000	Owner Interest Receiv.
05	Attorney Fees	6350-000	Legal Fees Reimbursement
		1350-000	Legal Fees Receivable

All fields in red are required

Accounting Method: ACCRUAL

Description	Merge code	Sample
Late Fees	<<MISC CHG. (01)>>	Balance Due
NSF charges	<<MISC CHG. (02)>>	Balance Due
Admin Fee	<<MISC CHG. (03)>>	Balance Due
Interest	<<MISC CHG. (04)>>	Balance Due
Attorney Fees	<<MISC CHG. (05)>>	Balance Due
Work Order	<<MISC CHG. (06)>>	Balance Due
Misc. Charges	<<MISC CHG. (07)>>	Balance Due
Special Assmts	<<MISC CHG. (08)>>	Balance Due
User Defined 9	<<MISC CHG. (09)>>	Balance Due
User Defined 10	<<MISC CHG. (10)>>	Balance Due
User Defined 11	<<MISC CHG. (11)>>	Balance Due
User Defined 12	<<MISC CHG. (12)>>	Balance Due
User Defined 13	<<MISC CHG. (13)>>	Balance Due

User Defined 14	<<MISC CHG. (14)>>	Balance Due
User Defined 15	<<MISC CHG. (15)>>	Balance Due
User Defined 16	<<MISC CHG. (16)>>	Balance Due
User Defined 17	<<MISC CHG. (17)>>	Balance Due
User Defined 18	<<MISC CHG. (18)>>	Balance Due
User Defined 19	<<MISC CHG. (19)>>	Balance Due
User Defined 20	<<MISC CHG. (20)>>	Balance Due
Continues the above pattern through User Defined Misc. Charge Code 60.		
Note: Will only show the Misc. Charge Codes that are active in a community.		

Flex Data

These Merge Codes pull information from the Flex Data Fields that are defined for each community:

Flex Data

First Flex Data Field Data	<<FLEX 1:(TEXT) FLEX 1 NAME	Inserts the flex data into a form letter
Second Flex Data Field Data	<<FLEX 2:(TEXT) FLEX 2 NAME	Inserts the flex data into a form letter
Third Flex Data Field Data	<<FLEX 3:(TEXT) FLEX 3 NAME	Inserts the flex data into a form letter

Continues the above pattern for each Flex Data field you define. With the new Unlimited Flex Data Fields, you can have as many Flex Data Fields setup as you wish in each community.

Note: Will only show the Flex Data Fields that are setup (defined) in a community.

CCR Data

These Merge Codes pull information from the CCR Codes and owner CCR Records:

CCR Codes

Action Level	Alter ? Days	Admin. Fees	Violation Action	Notice Template
1	0	\$ 0.00	1st Letter	23 First Violation
2	10	\$ 50.00	50 - Initial Fine	24 Second Viol.
3	10	\$ 100.00	100 - 1st Add Fine	25 Third Viol- 100
4	10	\$ 250.00	250 - 2nd Add Fine	26 Final Viol.
5				

CCR Records

Next Action	Date	Description	Amount
Next Action	5/25/2009	50 - Initial Fine - 24:Second Viol.	\$ 50.00
Last Action	5/15/2009	1st Letter - 23:First Violation	

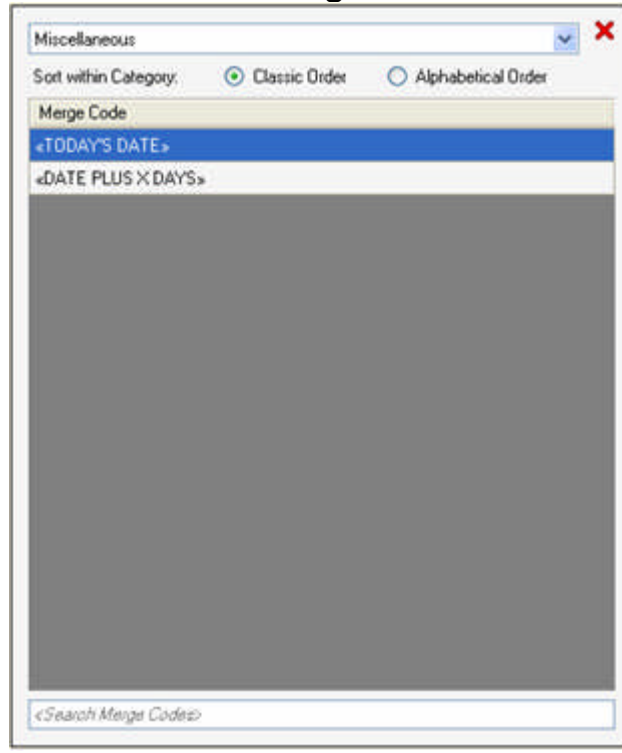
Description	Merge code	Explanation
CCR Creation Date	<<CCR CREATION DATE>>	
CCR Request Date	<<CCR REQUEST DATE>>	
CCR Close Date	<<CCR CLOSE DATE>>	

CCR Approval Type	<<CCR APPROVAL TYPE>>	
CCR Summary Description	<<CCR SUMMARY DESCRIPTION>>	
CCR Detailed Description	<<CCR DETAILED DESCRIPTION>>	
CCR Status	<<CCR STATUS>>	
CCR Owner Resolution Action	<<CCR OWNER RESOLUTION ACTION>>	
CCR Reason For Rejection	<<CCR REASON FOR REJECTION>>	
CCR Next Inspection Date	<<CCR NEXT INSP. DATE>>	
CCR Last Inspection Date	<<CCR LAST INSP. DATE>>	
CCR Respond by Date for ACC Request	<<CCR RESPOND BY. DATE>>	
CCR Current Action Date	<<CCR CURRENT ACTION DATE>>	
CCR Current Action Description	<<CCR CURRENT ACTION DESCRIPTION>>	
CCR Last Action Date	<<CCR LAST ACTION DATE>>	
CCR Last Action Description	<<CCR LAST ACTION DESCRIPTION>>	
CCR Violation Fee	<<CCR VIOLATION FEE>>	
CCR Code and Description	<<CCR CODE AND DESCRIPTION>>	
CCR Article Cited	<<CCR ARTICLE CITED>>	
CCR Photo Image	<<CCR RECORD'S IMAGE>>	
CCR # Days Level 1	<<CCR # DAYS LVL1>>	
CCR # Days Level 2	<<CCR # DAYS LVL2>>	
CCR # Days Level 3	<<CCR # DAYS LVL3>>	
CCR # Days Level 4	<<CCR # DAYS LVL4>>	
CCR # Days Level 5	<<CCR # DAYS LVL5>>	
CCR # Days Level 6	<<CCR # DAYS LVL6>>	
CCR # Days Level 7	<<CCR # DAYS LVL7>>	
CCR # Days Level 8	<<CCR # DAYS LVL8>>	
CCR # Days Level 9	<<CCR # DAYS LVL9>>	
CCR # Days Level 10	<<CCR # DAYS LVL10>>	
CPS Coordinates	<<CCR GPS COORDINATES>>	This is captured if you use TOPS Go! to enter violations
Data CPS Coordinates are Captured	<<CCR GPS CAPTURE DATE>>	
Outstanding CCR Violations - ALL Open List all open violations	<<OUTSTANDING CCR VIOLATIONS - ALL>>	

Miscellaneous

These Merge Codes let you format dates in Form Letters:

Misc. Merge Codes



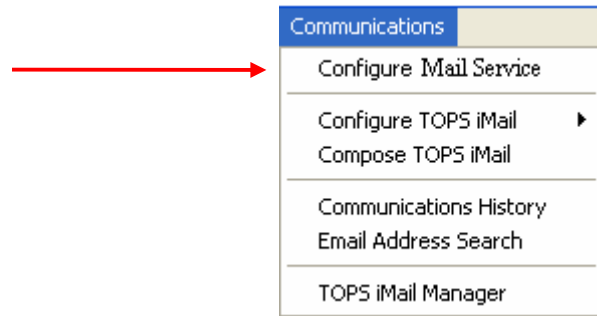
Description	Merge code	Sample
Today's Date (Full)	<<TODAY'S DATE>>	May 15, 2012
<p>When you insert the <<TODAY'S DATE>> Merge Code in a letter, you can then right click on the <<TODAY'S DATE>> Merge Code in the letter to select any of the following date formats.</p>		
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <ul style="list-style-type: none"> MM/DD/YYYY - example: 10/12/2012 MM/DD/YY - example: 10/12/12 Full - example: October 12, 2012 Long - example: Friday, October 12, 2012 Month - example: October Month (Number) - example: 10 Day - example: Friday Day (Number) - example: 12 Year - example: 2012 </div>		
<p>Simply click on any of these date formats to have the date printed in the selected format.</p>		
Date (MM/DD/YY)	<<DATE PLUS X DAYS>>	05/15/09

Configuring Mail Service

If you wish to use SouthData's SignatureMail™ or CertMail™ systems to send Certified, Certified + First Class Mail or just standard First Class Mail, you must first complete some setup steps. Follow these steps to complete the setup:

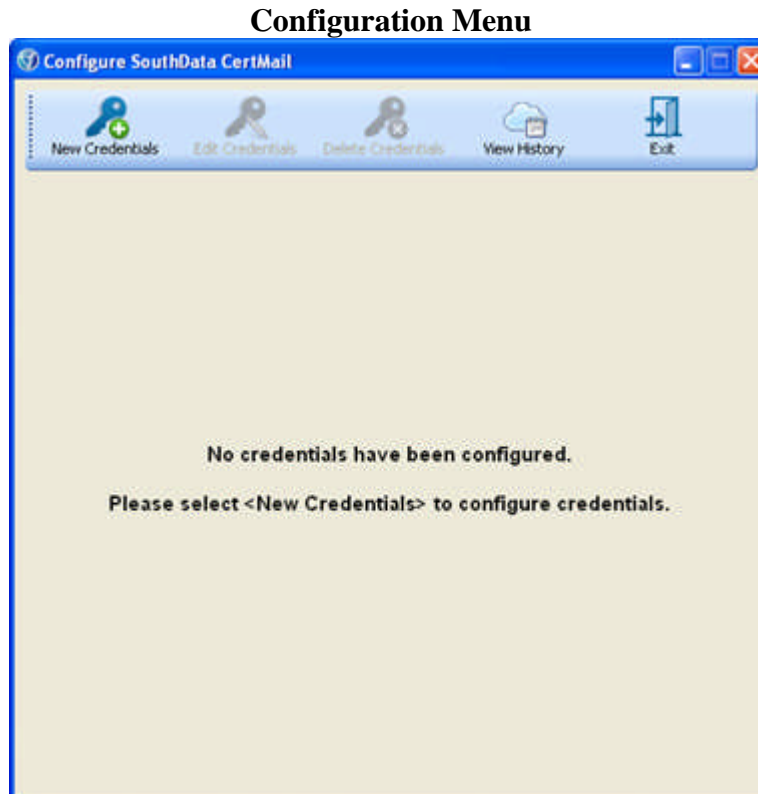
Configure Mail Service

In TOPS, go to the **Communications** menu on the File toolbar. You will see the Communications menu:



Select **Configure Mail Service** from this menu.

You will see the Configuration menu:



If you see the message:

**No credentials have been configured.
Please select <New Credential> to configure credentials.**

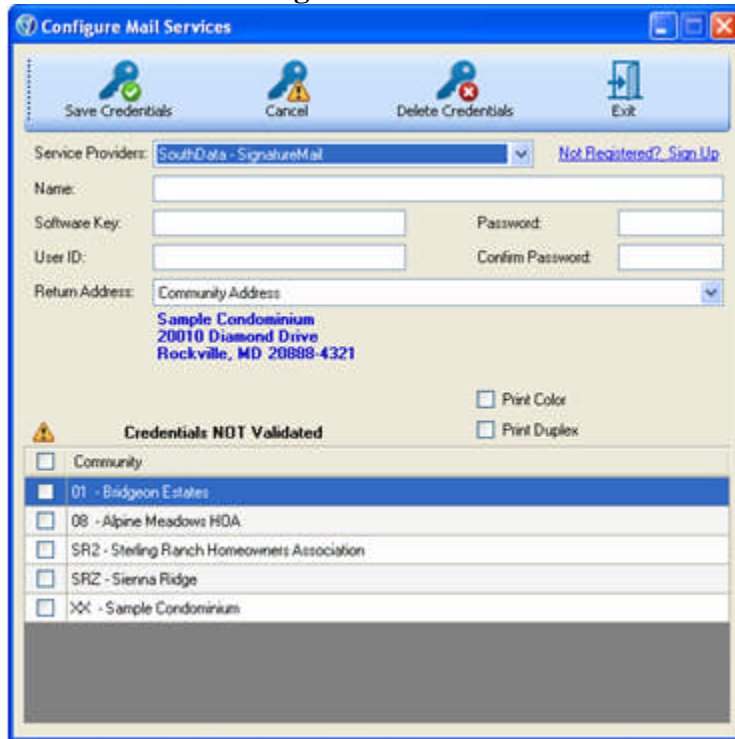
It means TOPS has detected that this community needs to create a SouthData account in order to use the SignatureMail/CertMail system to send electronic mail. You must start the setup by clicking on the **New Credentials** button.



Click the **New Credentials** button.

You will see the screen for completing the setup in TOPS:

Configure Mail Service



This is where you are activating the SouthData SignatureMail™ and also their CertMail™ interface in TOPS. This makes it so you can easily forward any Form Letter generated in TOPS to SouthData for printing and sending through SignatureMail™ or CertMail™..

Service Provider

At this time, the only Service Provider that TOPS can interface with to send Certified, Certified + First Class Mail or just standard First Class Mail is SouthData through their SignatureMail/CertMail™ system.

Accept the default of:

SouthData – SignatureMail

Follow these instructions to get setup with SouthData so you can use their Signature/CertMail™ system.

Existing SouthData Account

If you have an account with SouthData already, then you simply need to complete the fields on the screen.

Name – the name of your organization. If a management company, then enter the management company name. You need to enter organization name to help SouthData

identify your print jobs.

Software Key – here you enter your existing SouthData customer account #.

User ID – enter a login ID that you wish to use to access SouthData’s Signature/CertMail™ system. This User ID is used when you transmit print jobs to SouthData or when you wish to download Certified Mail Receipts back into TOPS.

Password – enter a Password to use with the User ID to complete the login into SouthData’s system.

Confirm Password – enter the Password a second time to make sure you entered it correctly.

Return Address – enter an address, either the community’s or the management company, to use for any returned mail sent by SouthData. This Return Address will be printed on each envelope sent by SouthData.

Print Options

Although you can set this print options for each Form Letter as you generate them, for your convenience, you can set the defaults you typically want to use here.

Print in Color – checkmark this box if you wish SouthData to print letters in color, such as, if you have colored letterhead. There is an extra charge from SouthData for color printing.

Duplex – checkmark this box if a letter has multiple pages for each owner and you wish SouthData to print the letters back-to-back so it saves on the printing charges.

Select Communities

You will see a list of communities like this:

<input type="checkbox"/>	Community
<input checked="" type="checkbox"/>	01 - Bridgeon Estates
<input type="checkbox"/>	08 - Alpine Meadows HOA
<input type="checkbox"/>	SR2 - Sterling Ranch Homeowners Association
<input type="checkbox"/>	SRZ - Sienna Ridge
<input type="checkbox"/>	XX - Sample Condominium

Checkmark which communities you wish to activate SouthData’s Signature/CertMail™ services for. If you are a management company, you only need to register your management company, not each community. SouthData will bill each community separately for mailing services using the TOPS Community ID.



When you have completed the screen, click the Save Credentials button. This will save your information and also “Validate” that you have an account with SouthData. If it cannot Validate your account, you will receive a message. That means that the Software Key does not match a valid SouthData account # for your organization.

No SouthData Account

If you need to setup a new SouthData account, starting on the screen below:

Configure Mail Service

Configure Mail Services

Save Credentials Cancel Delete Credentials

Service Provider: SouthData - SignatureMail [Not Registered? Sign Up](#)

Name: _____

Software Key: _____ Password: _____

User ID: _____ Confirm Password: _____

Return Address: Community Address
Sample Condominium
20010 Diamond Drive
Rockville, MD 20888-4321

Print Color Print Duplex

Credentials NOT Validated

- Community
- 01 - Bridgeon Estates
- 08 - Alpine Meadows HOA
- SR2 - Sterling Ranch Homeowners Association
- SRZ - Sienna Ridge
- >>> - Sample Condominium

Notice this link on the above screen. Click the “*Not Registered? Sign Up*” link. Then complete the customer registration screens on SouthData’s web site as follows:

Setup SouthData Account

Welcome Page

SouthData
INNOVATIVE SOLUTIONS
Billing • Scanning • Networking

Beyond Billing
Secure Client Login
Call our Sales Team for a no-obligation quote at 800.549.4722.

GETTING STARTED • PRODUCT SOLUTIONS • ABOUT US • NEWS & INFO • CONTACT US • Search Website

Mailing letters has never been easier!

SouthData, Inc. and TOPS Software have teamed up to provide you the best of both worlds – TOPS Software’s next generation property management solution and SouthData’s industry leading mail services rolled into one click of a button. From TOPS Software, you can now send files directly to SouthData to be printed and mailed without the need to upload files manually to SouthData or go to the Post Office.

How does it work?
Simply sign up with SouthData and create a new account. Within minutes, you will receive an email containing your username and password. Plug your login info into TOPS application, and you’ll be ready to go.

Sign up today and start sending out your Signature Mail and Certified Mail Letters immediately.

[Create an account now](#)

TOPS
SignatureMail
CertMail

Call our Sales Team for a no-obligation quote at 800.549.4722.
Create An Account
Log In | Site Map | Privacy Policy | Terms of Use | SouthData, Inc. 301 Technology Lane, Mount Airy, NC 27030
Copyright © SouthData, Inc. All rights reserved.

Click the “*Create an account now*” link.

When you click the “*Create an account now*” link you will see the next page for setting up a SouthData account #.

Setup SouthData Account – Page 1

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Beyond Billing
Secure Client Login
Create An Account. Forget your password?
Call our Sales Team for a no-obligation quote at 800.549.4722.

GETTING STARTED ▾ PRODUCT SOLUTIONS ▾ ABOUT US ▾ NEWS & INFO ▾ CONTACT US ▾

Search Website

Create a SouthData.com Account

We're glad that you want to do business with us. But before we can get started, we first need to learn a little more about you.

You will need to complete the following forms with your client information in order to receive your client number and login information to SouthData.com.

To start the new client process, please fill out all of the following basic information about your company and press the "Next" button.

Organization Information

Organization Name: *Red = Required

Organization Type:

Software Used:

[Next](#)

Communicate & Bill the Smart Way!

Combine your communication and your billing needs. Add a letter, newsletter, budget, announcement or brochure to your monthly, quarterly or annual billing.

SouthData is the Smarter Way to Communicate & Bill.

With us as your partner, you will:

- Save time
- Reduce your hassle
- Lower your billing costs
- Focus on your customers
- Communicate more effectively

Call 800.549.4722 to ask us about the Smarter Way to Communicate & Bill.

Call our Sales Team for a no-obligation quote at 800.549.4722.
[Create An Account](#)

[Log In](#) | [Site Map](#) | [Privacy Policy](#) | [Terms of Use](#) | SouthData, Inc. 201 Technology Lane, Mount Airy, NC 27030
Copyright © SouthData, Inc. All rights reserved.

Organization Name – enter the name of your organization here.

Organization Type – use the drop down list to select the one that best fits.

Software Used – use the drop down list until you find *TOPS Software*



Click the **Next** button to proceed.

Proceed to the next page.

Setup SouthData Account – Page 2

SouthData
INNOVATIVE SOLUTIONS
Billing • Scanning • Networking

Beyond Billing
Secure Client Login
Create An Account. Forget your password?
Call our Sales Team for a no-obligation quote at 800.549.4722.

GETTING STARTED ▾ PRODUCT SOLUTIONS ▾ ABOUT US ▾ NEWS & INFO ▾ CONTACT US ▾

Search Website **GO**

[Create a SouthData.com Account](#)

Address Information
Please fill out your address information.

Billing Address:
Company: ABC Management Inc.
Attention:
Street/PO Box:
City:
State: (Please Select) ▾
Zip:

My Mailing Address is different than my Billing Address
 My Shipping Address is different than my Billing Address

Communicate & Bill the Smart Way!
Combine your communication and your billing needs. Add a letter, newsletter, budget, announcement or brochure to your monthly, quarterly or annual billing.

SouthData is the Smarter Way to Communicate & Bill.
With us as your partner, you will:

- Save time
- Reduce your hassle
- Lower your billing costs
- Focus on your customers
- Communicate more effectively

Call 800.549.4722 to ask us about the Smarter Way to Communicate & Bill.

Call our Sales Team for a no-obligation quote at 800.549.4722.
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Complete your billing address info:

Attention – the name of the person on your staff that bills should be addressed to.

Street/PO Box – enter the first line of your billing address

City – enter your city.

State – enter your state.

Zip – enter your zip code. There is room for the + Four code if you know it.



Click the **Next** button to proceed.

Proceed to the next page.

SouthData
INNOVATIVE SOLUTIONS
Billing • Scanning • Networking

Beyond Billing
Secure Client Login
Create An Account. Forget your password?
Call our Sales Team for a no-obligation quote at 800.549.4722.

GETTING STARTED ▾ PRODUCT SOLUTIONS ▾ ABOUT US ▾ NEWS & INFO ▾ CONTACT US ▾

Search Website **GO**

[Create a SouthData.com Account](#)

Contact Information

Please fill out the following contact information for the account administrator. All proofs and other correspondence will be sent to the account administrator by default, but the account administrator will be able to create new user accounts and assign the correspondence to be sent to other users.

If you have any other additional contact information, please use the additional information form on the next page to supply it.

Account Administrator

First Name:

Last Name:

Title:

Email:

Phone: Ext:

Account information

Your password must fit the following requirements:

- Must not contain your name, username, or organization name
- Must be at least 8 characters long
- Must have the following character types:
 - Uppercase Letters
 - Lowercase Letters
 - Numerals
 - Special Characters

UserID:

Password:

Confirm:

Other information

Switchboard:

Fax:

Call our Sales Team for a no-obligation quote at 800.549.4722.
[Create An Account](#)

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Communicate & Bill the Smart Way!

Combine your communication and your billing needs. Add a letter, newsletter, budget, announcement or brochure to your monthly, quarterly or annual billing.

SouthData is the Smarter Way to Communicate & Bill.
With us as your partner, you will:

- Save time
- Reduce your hassle
- Lower your billing costs
- Focus on your customers
- Communicate more effectively

Call 800.549.4722
to ask us about the Smarter Way to Communicate & Bill.

Account Administrator – this is the person on your staff who is authorized to as the SouthData contact and who also can make changes to your SouthData account.

First Name

Last Name

Title

Email Address

Phone #

Login Info – for the Account Administrator

User ID

Password

Confirm Password

Other Info

Switchboard

Fax

Next

Click the **Next** button to proceed.

Proceed to the next page.

Setup SouthData Account – Page 4

SouthData
INNOVATIVE SOLUTIONS
Billing • Scanning • Networking

Beyond Billing
Secure Client Login
Create An Account. Forget your password?
Call our Sales Team for a no-obligation quote at 800.549.4722.

GETTING STARTED ▾ PRODUCT SOLUTIONS ▾ ABOUT US ▾ NEWS & INFO ▾ CONTACT US ▾

Search Website GO

Create a SouthData.com Account

Additional Information

How did you hear about SouthData?

Please select all that apply:

- Word of mouth or referral
- Tradeshaw
- SouthData account executive contacted you
- SouthData sample or product
- Direct mail piece from SouthData
- Found via Search Engine:
- Advertisement:

Link from another website:

- Facebook
- Twitter
- Other:

Please enter any comments:

Please estimate your anticipated volume for the next 12 months.

Coupon Volume:

Statement Volume:

Primary Lockbox:

Additional Information:

Call our Sales Team for a no-obligation quote at 800.549.4722.
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How did you hear about SouthData?

Checkmark any that apply

Anticipated Volume – this information is for coupon or statement printing. We suggest just entering the total number of homes under management.

Primary Lockbox – if you use a bank lockbox system, use the drop down to select your bank.

Additional Information – enter any special information you wish to notify SouthData about.

Click the **Next** button to proceed.

Proceed to the next page.

Setup SouthData Account – Page 5

The screenshot shows the SouthData website's account setup page. At the top, the SouthData logo is displayed with the tagline 'INNOVATIVE SOLUTIONS' and services listed: 'Billing • Scanning • Networking'. A navigation menu includes 'GETTING STARTED', 'PRODUCT SOLUTIONS', 'ABOUT US', 'NEWS & INFO', and 'CONTACT US'. A search bar is located in the top right corner. The main content area is titled 'Create a SouthData.com Account' and features a 'Terms and Conditions' section with a scrollable list of terms. Below the terms is a checkbox labeled 'By clicking the Agree button, you agree to these terms and conditions.' and two buttons: 'Previous' and 'I Agree'. To the right of the terms is a promotional banner for 'Communicate & Bill the Smart Way!' which includes a list of benefits and a call to action to call 800.549.4722. At the bottom of the page, there is a footer with contact information and a copyright notice.

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Search Website GO

Create a SouthData.com Account

Terms and Conditions

- All orders are subject to a \$50 Minimum Run Charge.
- Orders are shipped FOB Mount Airy, NC.
- Postage and return shipping are in addition to the cost of the goods and services provided.
- North Carolina Sales and Use Tax apply to all orders from clients with offices in that state.
- Product specifications are subject to change without notice.
- Payment terms are NET 15 DAYS.
- Client accepts responsibility for all charges for goods and services ordered by any employee of the client organization.
- Client agrees to pay all costs related to the collection of past due balances on any account in its name, including but not limited to, collection agency fees, attorney fees and court costs.
- Postage in excess of \$300.00 per order must be paid in advance.

Limited Warranty

By clicking the Agree button, you agree to these terms and conditions.

Previous I Agree

Communicate & Bill the Smart Way!

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Call our Sales Team for a no-obligation quote at 800.549.4722.
Create An Account

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This is the **Terms and Conditions** of service page. You **MUST** click “I Agree” in order to complete setting-up the SouthData account.

I Agree

Click the “**I Agree**” button to complete setting-up your SouthData account.

Once you click “I Agree”, you will see the final page showing that you have completed setting-up a SouthData account.

Setup Complete



This page confirms that you have completed the set-up. It also gives you your new SouthData client number.

Confirming Email

A confirming email will be sent to the Account Administrator with your SouthData client number and login ID. You will need to enter this information into TOPS on the Configure Mail Services screen below:

Configure Mail Services

Configure Mail Services

Save Credentials Cancel Delete Credentials Exit

Service Provider: SouthData - SignatureMail [Not Registered? Sign Up](#)

Name:

Software Key: Password:

User ID: Confirm Password:

Return Address: Community Address

Sample Condominium
20010 Diamond Drive
Rockville, MD 20888-4321

Print Color
 Print Duplex

Credentials NOT Validated

Community

01 - Bridgion Estates

08 - Alpine Meadows HOA

SR2 - Sterling Ranch Homeowners Association

SR2 - Sienna Ridge

XX - Sample Condominium

Follow the instructions under “*Existing SouthData Account*” to enter the information from the confirming email into the fields above.

The ends the manual section on Form Letters