Communications

Communications

"Communications" is a new menu choice on the TOPS File menu bar. From here, you can setup the mass email function in TOPS which can be used for communicating with owners, vendors or community officers. We call this new service ***TOPS iMail***. When considering all the costs involved with using the US Postal Service for communications, using email offers a low-cost, very efficient way to communicate with owners, officers and vendors. Not only can you save the cost of postage, but the cost of stationary, envelopes and staff time to stuff envelopes and then take them to the mail box. Plus, emailed communication is instantaneous whereas traditional mail can take days to be received.

While TOPS iMail is a subscription service, the potential savings far outweigh the monthly costs. TOPS iMail can be used to send general notices, letters and correspondence, delinquency letters, CCR violation letters and Bills/Statements. Rather than print owner mailing labels, you can elect to email as an alternative. Beyond use with homeowners, it can also be used for communicating with vendors to solicit bids or just daily issues. Wherever you need to send something to a group of owners or vendors, TOPS iMail is there to save you time and expense.

Communication History

To keep track of the communications with owners and vendors, a community-wide Communication History is maintained. It shows all the communications with owners and vendors by date along with a description of what was sent. The history is updated for both printed and emailed communications. Attachments sent are also stored in the history. The Communication History will be invaluable as proof that communications were sent to an owner if a dispute should ever arise. This is particularly important with emailed communication because emails are a newer form of mail that does not have established legal case history when used for required notices.

The Communication History is kept for the entire community with drill-down capability showing all the recipients included in the mailing. It is also kept for individual owners and vendors where it can be viewed from the Owner Maintain or Vendor Maintain screens. That way, you can easily view all the communications with a particular owner or vendor.

Community Mail History

Another benefit of the Communication History is, it can provide you with a history of all the mass mailings, whether printed or emailed, done for a community for a range of dates. As mailings are done, the user check marks a "Bill to Community" box. From the mail History, you can view/print all the mailings that were check marked "Bill to Community". The report will assist with billing communities for mailing costs. This history will be helpful to management companies so they can recover all out-of-pocket postage, printing and mailing expenses due from a community.

The mail History will be expanded in the future to include per item costs and bundling other additional costs to provide a full billing mechanism for the management company. It will also give the option to automatically create an AP Bill in each community payable to the management company to minimize recurring entry of monthly management invoices.

So the new Communication suite with mass email adds a lot of valuable functionality to your TOPS system. But in order to use it, there are some setup steps and other things that you need to understand so you can get the maximum benefit from this powerful feature.

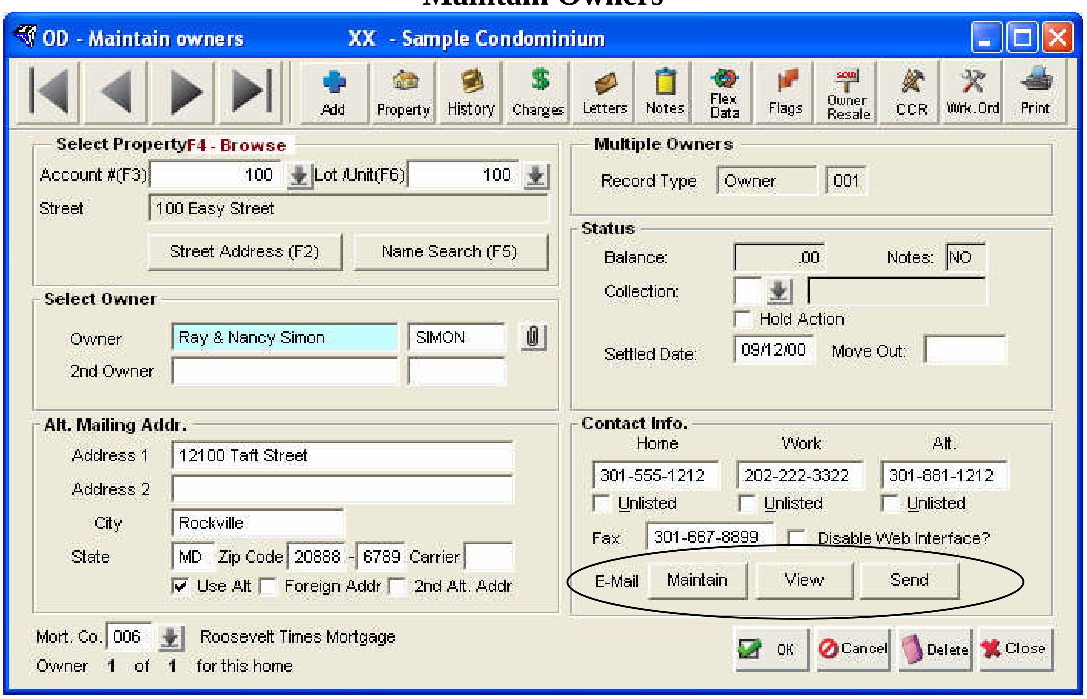
Maintain Owners

So you understand how everything ties together, we will briefly describe the new multiple owner email addresses and related owner functions which are used by the Communications system. The Maintain Owners screen has changed so that you can store multiple email addresses for each owner record. You can indicate which email addresses to use for different types of communication.

A complete Communication History is kept for each owner. So no matter whether you choose to print/send a communication by mail or use email, there is a history for each owner showing the date, time, description and whether it was printed or emailed. This can be handy for proving that a communication was sent if challenged by an owner.

The new owner screen looks like this:

Maintain Owners

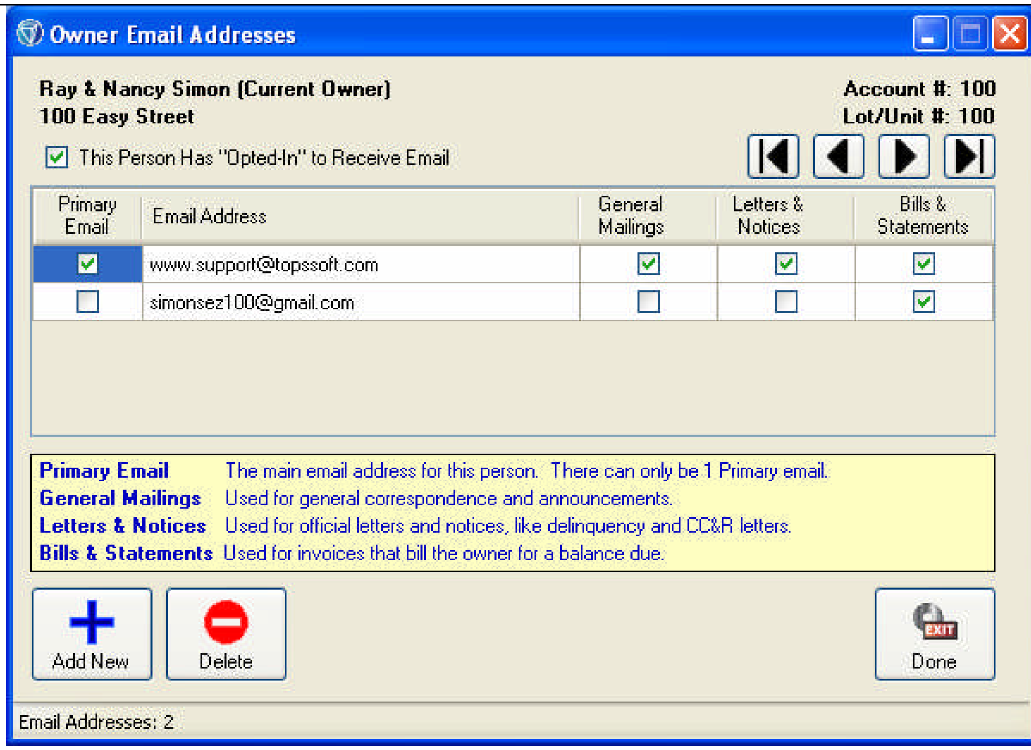


Notice under the **Contact Info** heading there are new buttons next to the **E-Mail** line where previously the owner email address was displayed.

	Click the **Maintain** button to show the email addresses for this owner. You can change or add new addresses from the Maintain screen.

If you clicked the **Maintain** button, you will see the owner email screen:

Owner Emails



There are several important email functions on this screen.

- Checkmark this option to activate email communication for this owner. If checked, then using TOPS iMail, you can send emails for various types of communication to this owner.


Click the **browse arrow** buttons to stay on the owner email screen but move to the next home or backwards to the previous home. This can be handy when updating or correcting owner emails for several homes.

Primary – This is the main email address for this owner. It should be the email address used for most types of communication. Although you can enter additional email addresses and send any type of communications to this address as well.

Note: There can be only 1 Primary email address per owner record.

Email Address – enter the owner's email address here. There can be multiple email addresses for each owner record.

General Mailings – The default email address to use for general communications, such as, the one to be used in place of a printed mailing label. An example might be, a mailing announcing the pool hours for the summer.

Letters & Notices – The default email address for sending official notifications like ones required in the community's legal documents. If you wish to use email to send letters, like Delinquency Letters or Violation Letters, you would likely use this email address. Likewise, it could be used for sending notification about the annual meeting or annual budgets.

Bills & Statements – The default email address to use for emailing Bills & Statements to an owner. This gives you an easy, low cost way to send Bills & Statements.

Whenever you do a mass email using TOPS iMail, you have the option to select any of the above 3 email address "types" to use for that particular email. So you always have complete control over which email address to use for each mailing.

Likewise, a complete Communication History is kept for each owner so you have a record of what was sent showing the date, time, description and whether it was printed or emailed.

Click the **Add New** button to add another email address for this owner. You will be positioned at the first available line where you can enter the email address and check which types of communications should be emailed to this address.

Click to highlight the email address you wish to delete, then click the **Delete** button.   It will permanently delete the owner email address.

Click the **Done** button to exit back to the Maintain Owner screen. Any changes you made to owner emails will automatically be saved.

	Click the **View** button to see the Communication History for this owner. The History shows ALL communications for this owner, both printed and emailed. For more information on viewing an owner's Communication History, see Maintain Owners in the Owner Database manuals.
	Click the **Send** button to open your default email system, or TOPS iMail if you have subscribed to it, and send a quick email to this owner.

This completes the quick instructions for working with the new, multiple email addresses for owners. Now we will turn back to continuing the manual section on the new Communications menu.

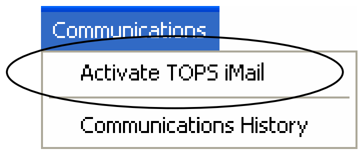
Communications Menu

This new menu choice is located on the File menu bar at the top of the screen.

This menu choice is where you can work with the mass email and access the complete Communication History for each community. We'll cover all the functions on the Communications menu next.

Activate TOPS iMail

Before you can begin to use the TOPS iMail system, you must activate it. When you first click on the new "Communications" menu choice, you will only see this menu option:



Click the **Activate TOPS iMail** menu choice.

You will see the **Activation** screen:

Activate TOPS iMail

By default, it will show the "Basic" plan which is *FREE*!

Select Plan	Use the down browse arrow to select any of the 4 plans which include: • Basic - *free* • Silver – *optional cost* • Gold – *optional cost* • Platinum – *optional cost* Each plan has email limits per day and per month. When you select the plan, you will see the limits automatically filled into these fields: **Daily Max** – the total daily number of outgoing emails allowed under your TOPS iMail plan. When it hits this limit, it will stop sending outgoing emails until the next day—unless you upgrade to the next higher plan. **Monthly Max** – the total monthly number of outgoing emails allowed under your TOPS iMail plan. When it hits this limit, it will stop sending outgoing emails until the next month—unless you upgrade to the next higher plan. **Max Attachment Size** – because of bandwith usage limits, we must limit the size of Attachments sent with emails. This line shows you the attachment size limit under your TOPS iMail plan. You will receive a warning if your attachment exceeds this size so you can make adjustments, if necessary. **Max Bandwith/Month** – because of bandwith usage limits with our email provider, each customer can only use a certain amount of bandwith each month when sending emails with attachments. This line shows you the bandwith limit allowed under your TOPS iMail plan. If you exceed that bandwith limit, TOPS reserves the right to pass on additional bandwith charges to you. **Price** – The monthly cost for the TOPS iMail plan you select. Even for the "Free" plan, you still must enter payment information, either a credit card or bank debit authorization as shown below. At anytime, you can go to the TOPS iMail Manager on the Communications Menu to view any pending or held email batches. This screen will always show you how many emails have been sent daily/monthly and how many outgoing emails can still be sent before hitting your limit. You can always change your TOPS iMail plan by calling your TOPS Account Exec at TOPS Sales 800-760-9966.
Contact Info	We need to know who the main contact is for any questions or issues with TOPS iMail. Please complete the following 3 simple info fields: **Name** – The person's name we should contact about TOPS iMail.

<table>
<tr><td></td><td>

Email – The person’s email address we should use to contact them about TOPS iMail.

Phone – The person’s email address we should use to contact them about TOPS iMail.

You must complete these 3 fields.

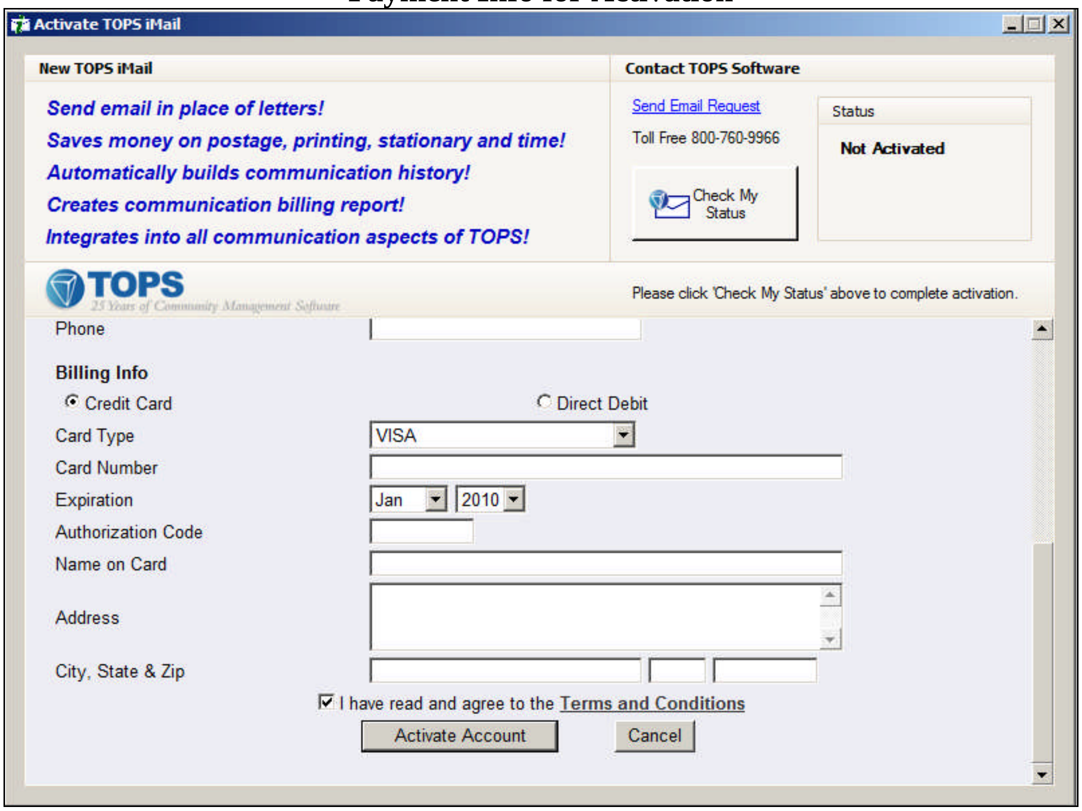
</td></tr>
<tr><td colspan="2">

Billing Info

</td></tr>
<tr><td colspan="2">

If you scroll down the Activation page, you will see these additional data fields to complete your payment info:

Payment Info for Activation



You have 2 payment options:

- **Credit Card**
- **Direct Debit**

Once you make your payment selection, proceed to fill in the information required to complete the payment section.

</td></tr>
<tr><td colspan="2">

To finish activating your TOPS iMail account, you must click to accept the Terms and Conditions.

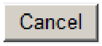
☑ I have read and agree to the Terms and Conditions

Make sure this is check marked to continue. You may click on the **Terms and Conditions** link to read the policies and Service Agreement for TOPS iMail.

</td></tr>
<tr><td>Activate Account</td><td>

Click the **Activate Account** button once all the information on the activation screen is completed.

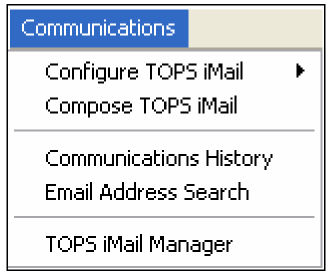
</td></tr>
</table>

	Click the **Cancel** button to exit this screen without saving any information entered.

Setup

Once you have activated TOPS iMail, your Communications menu will change and look like the one below:

Communications Menu



Before you can use the Mass Email, first you must complete two setup steps.

Configure TOPS iMail	Click the **Configure TOPS iMail** menu selection to setup the required info to use TOPS iMail.

When you click **Configure TOPS iMail**, you will see the following screen:

There are two items of setup that need to be configured:

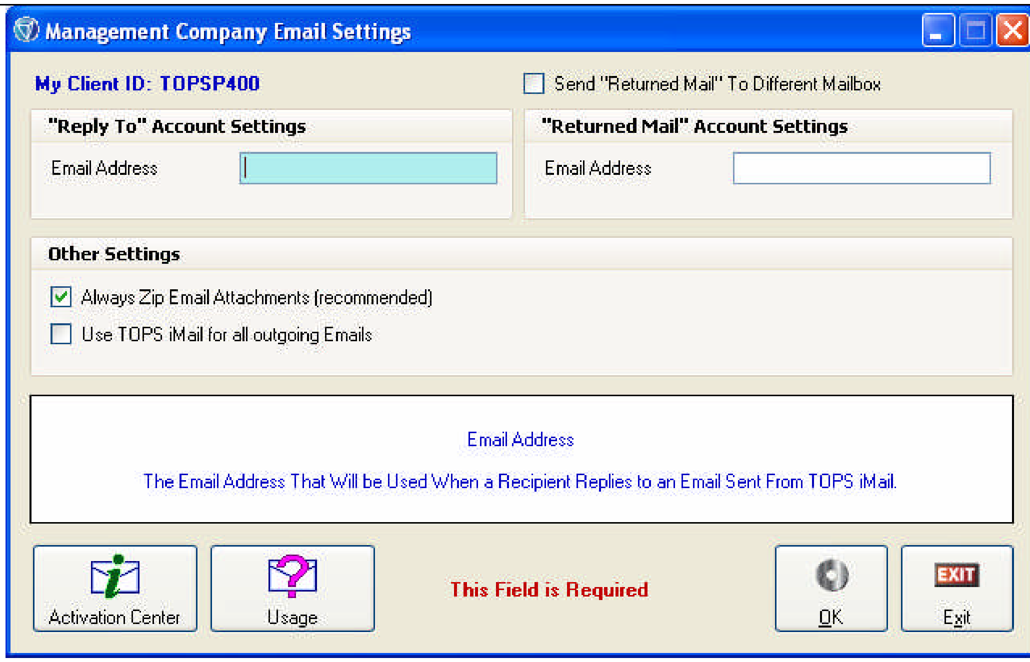
- Management Company Settings
- User Settings & Preferences

Each of these configuration steps are explained below.

Management Company Settings	Whether you are a management company managing multiple communities or a self-managed community, this is where you define general settings such as your Reply To email address and Returned Mail email address to use with the Mass Email.

The Management Company Settings looks like this:

Management Company Settings



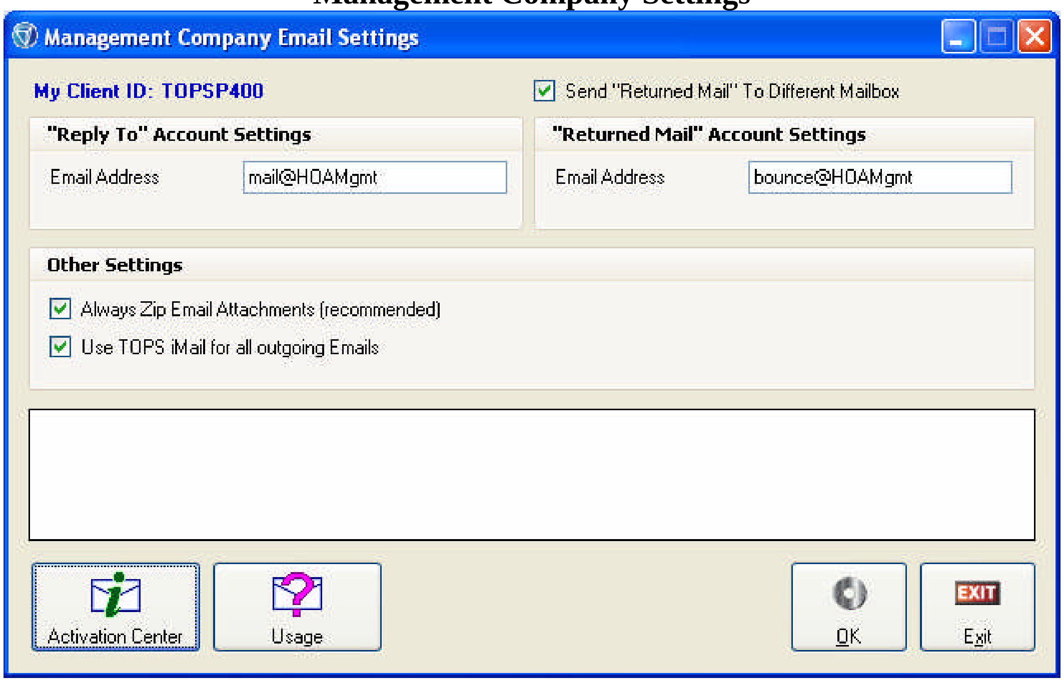
Complete the screen as follows:

"Reply To" Account Settings	Here is where you would enter the general **Reply To** email address for use with the Mass Email. **Email Address** – Usually, this is the general Email Address for your organization. This becomes *one* of the Reply To options whenever you are sending a Mass Email.
Send 'Returned Mail' to Different Address	Checkmark this box if you wish any "bounced" or returned mail to go to a different email address other than the Reply To address. For example, you might want to setup a special mailbox for returned mail so you can either keep track of it or contact the owner or vendor to update your records for the correct email address. This is an option which could be skipped if you don't wish to use it. But if you want Returned Mail to go to a different Reply To address, then fill in these fields. **<u>Returned Mail Account Settings</u>** If you checkmark this box, then the following fields become active: **Email Address** – the Email Address for the Returned Mail to be received into in your current email system. You might need to setup that address in your default email system (Ex. – Outlook® or Outlook Express®, etc) so there is a mailbox for the returned mail.
Always Zip Email Attachments	By default, this box is checked. To save time and bandwith usage (speed delivery) we recommend that all attachments be zipped into a compressed format. If you checkmark this box, then TOPS iMail will automatically compress email attachments to reduce the size of the attachment. A standard "zip" format is used so the recipient should be able to

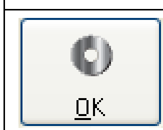
	simply open the email, click on the attachment and it will open automatically in a readable format.
Use TOPS iMail for all outgoing Emails	Checkmark this box to always use the TOPS iMail system when sending out emails. The benefit of using TOPS iMail, rather then your own company email system, is the Communication History is updated when TOPS iMail is used whereas it is NOT updated when your company email is used. We have no way of capturing the necessary info from your company email to record it in the Communication History. **Note:** TOPS iMail is a subscription based email service, there is a cost associated with its use.

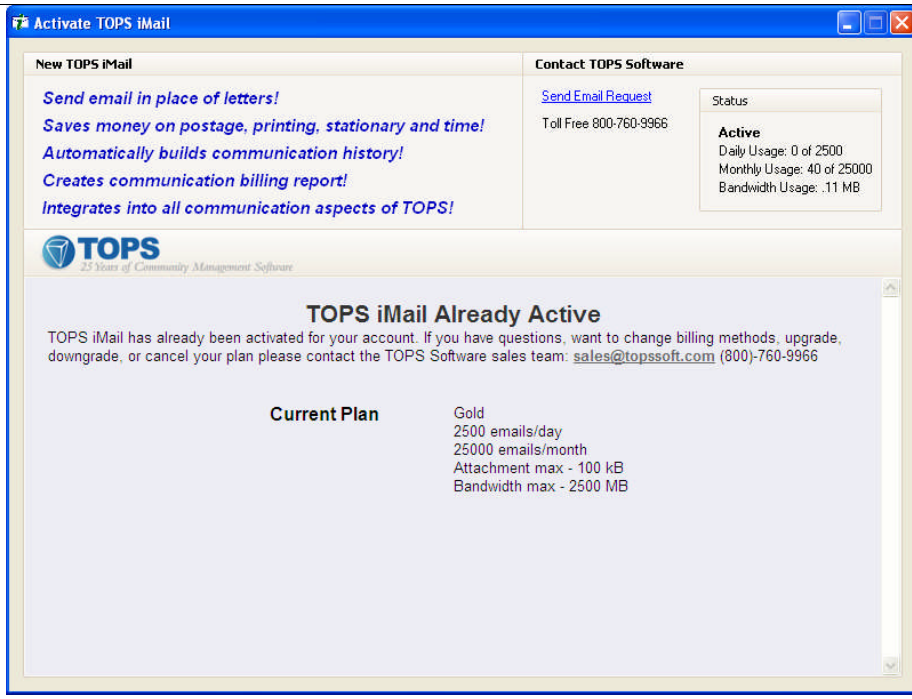
A completed screen would look like this:

Management Company Settings



The above example shows the Management Company Email Settings with the "Returned Mail" area completed. Again, this is an option which could be skipped if you don't wish to use it.

	Once you have completed the Management Company Email settings, click the **OK** button to save the changes and exit.
	Click the **Exit** button to close the screen without saving any changes.
	Click the **Activation Center** button if you have not previously activated TOPS iMail. If you have activated it, then you will see a screen like this letting you know the service is already activated:

<table>
<tr>
<td></td>
<td>


If you have activated the TOPS iMail service, but wish to make changes to your plan, please contact TOPS Sales Dept at 800-760-9966. You cannot make plan changes without speaking with your TOPS Sales representative.
</td>
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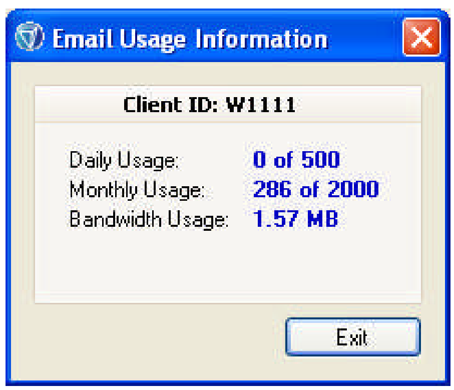
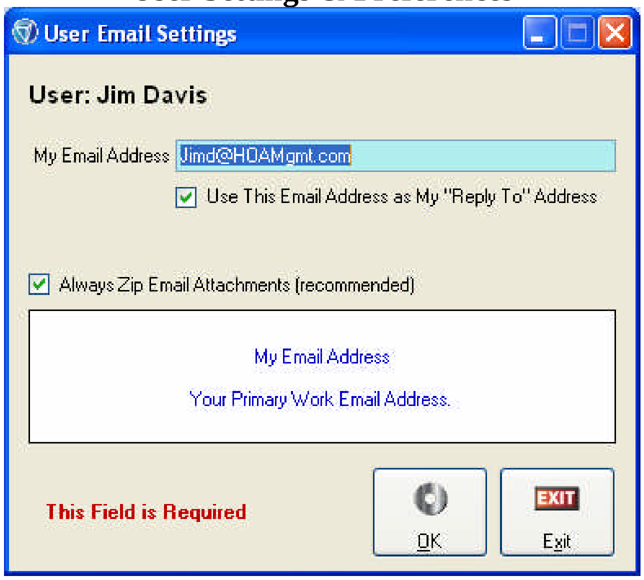
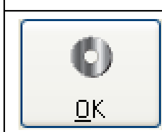
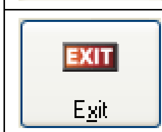
</td>
<td>
Click the Usage button to view how many emails have been sent today and this month along with your bandwith usage:


Click the Exit button to close the Usage screen.
</td>
</tr>
</table>

<table>
<tr><td>User Settings & Preferences</td><td>Click this menu choice under Configuration to setup individual user email settings.</td></tr>
<tr><td colspan="2">When you click User Settings & Preferences, you will see this screen:
User Settings & Preferences


Initially, the email address displayed on this screen is from the Users & Password setup under Administration, but you can change it here if needed.</td></tr>
<tr><td>My Email Address</td><td>The email address for this TOPS user.
When sending a mass email using TOPS iMail, you can select to use the email address entered here for each TOPS user for the “Reply To” or use a different “Reply To” email address.</td></tr>
<tr><td>Use This Email Address as My ‘Reply To’ Address</td><td>Checkmark this box ☑ to make the email address displayed above the default to use whenever you are sending TOPS iMails to owners or vendors. If you do NOT check this box, then you will have to enter a Reply To address for each mass email you send using TOPS iMail.</td></tr>
<tr><td>Always Zip Email Attachments</td><td>Checkmark this box ☑ to compress email attachments into a zip file so it takes up less space. This will speed up sending emails with attachments because it uses less internet bandwith. With zipped attachments, normally the recipient just needs to click on the attachment to unzip it into a readable format.</td></tr>
<tr><td>
</td><td>Click the OK button to save any changes made to the User Email Settings screen.</td></tr>
<tr><td>
</td><td>Click the Exit button to close the User Email Settings screen without saving any changes. It will leave the info “as is”.</td></tr>
</table>

Using TOPS iMail

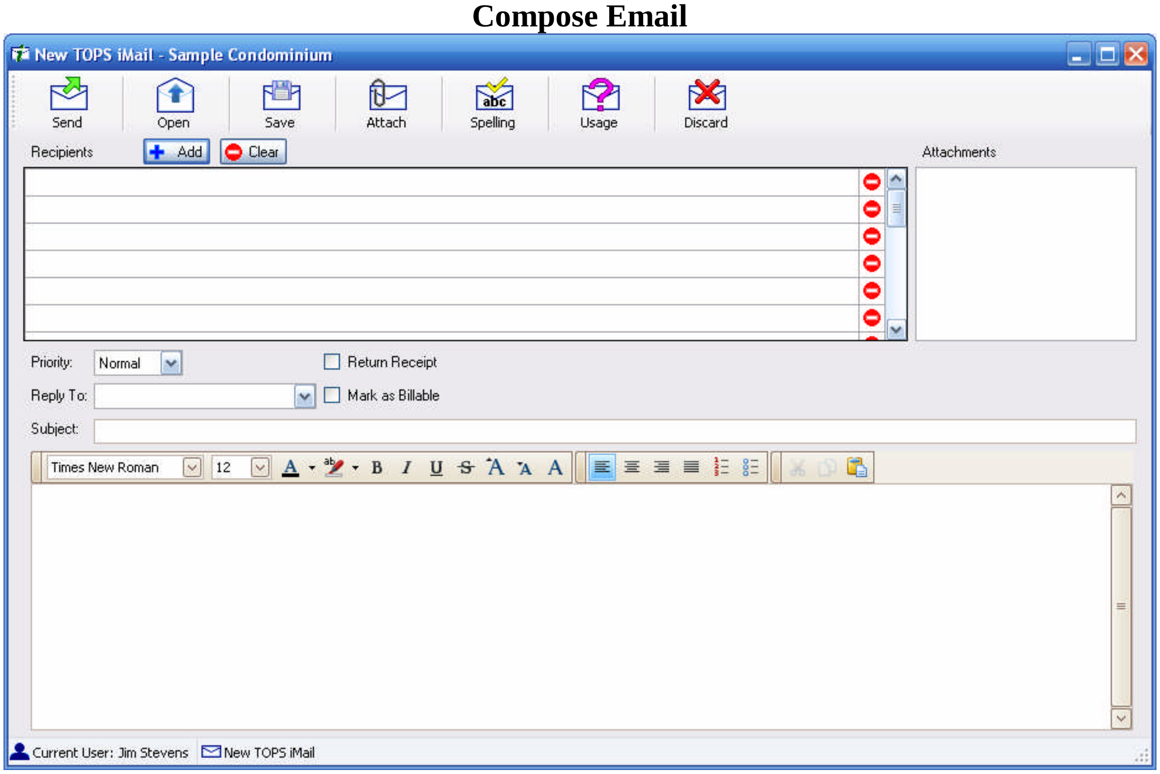
Once the setup is complete, there are a number of places throughout TOPS Professional where you can use TOPS iMail as an alternative to printed mail. TOPS iMail can be used in place of mailing labels for owner mailings, in place of printed form letters (including delinquency letters and CCR violation letters) and also for sending Bills/Statements. Generally, wherever you can print something to send to an owner, you also now have the option of using mass email as an alternative.

You must subscribe to the TOPS iMail service in order to use the mass email capabilities in TOPS Professional.

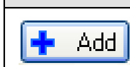
<u>Mass Emailing</u>	
Compose TOPS iMail	This is only one place you can use TOPS iMail to send a mass email to owners. As mentioned above, generally, wherever you can print something to send to an owner, you also have the option of using TOPS iMail as an alternative. To send a mass email to some or all owners or vendors in this community, click the **Compose TOPS iMail** selection on the Communications Menu.

When you choose **Compose TOPS iMail** a screen will open for writing the email and selecting the recipients:

Compose Email

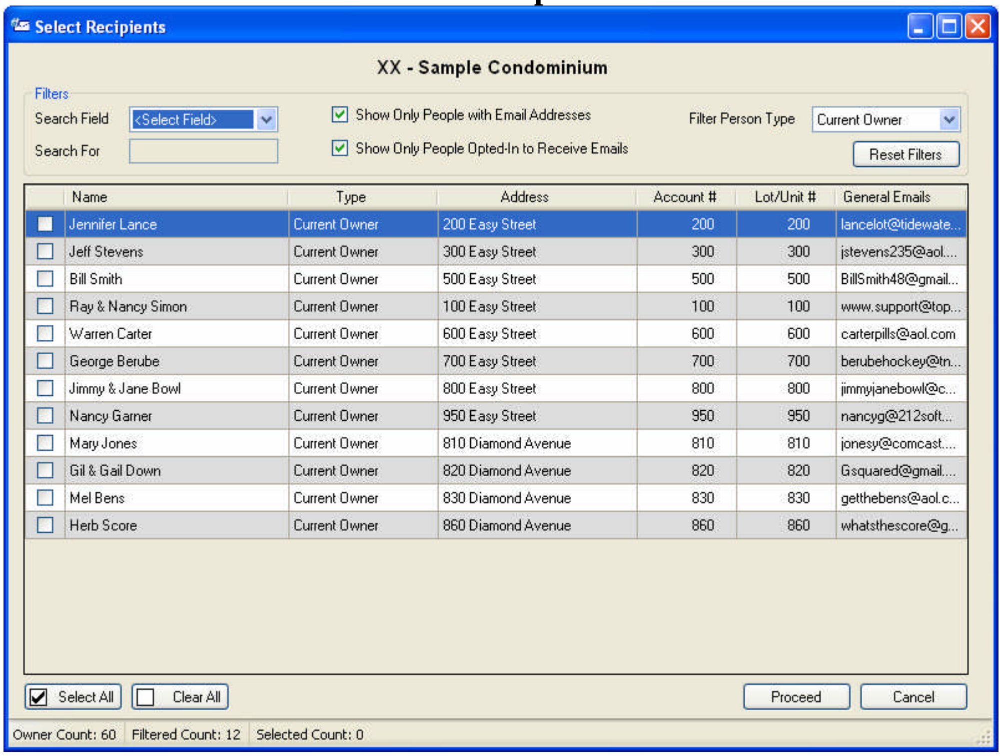


We'll cover each of the functions on the Compose Email screen.

Select Recipients	
	Click the **Add** button to select who should receive this mass email. It will

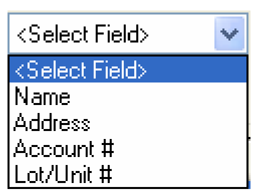
open the Recipients screen:

Select Recipients



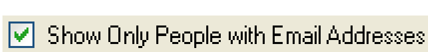
By default, it will show all Current Owners that have 'Opted In' to receive email from the community.

Search Field – By default, it will just display the Current Owners in Street Address order from lowest to highest number beginning with the first street in the community. If you want to display the Current Owners in a different order, click the down browse arrow next to **Search Field**. You will see a browse box with these search orders:



Simply click on any of these search orders to change the display order, then select your email recipients.

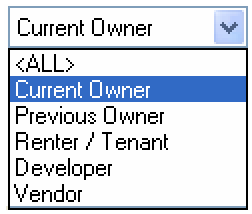
Search For – If you click the Search Field above, then the **Search For** field becomes active where you can select a particular person as a recipient. Depending on the Search Field selected, you can jump to a particular Name, Street Address, Account # or Lot/Unit # as an alternative to browsing through the entire list to select the recipient.



This box is checked by default. The list of recipients shown on the screen will only include those people who have email addresses on file in TOPS. Uncheck it to show ALL people.

This box is checked by default. The list of recipients shown on the screen will only include those people who have "Opted In" to receiving email from the community. Generally, those are the ONLY people you should send emails to using TOPS iMail. Uncheck it to show ALL people.

Filter Person Type – By default, it will display the Current Owners. If you wish to send emails to other owner types or vendors, click the down browse arrow  next to **Filter Person Type**. You will see a browse box with these Person Types:



Simply click on any of these Person Types to change the persons displayed on the screen. You can then select your email recipients.

Click the **Reset Filters** button to return the Search Field and Filter Person Type back to the defaults, which is simply all the Current Owners with email addresses on file in TOPS.

Click the **Select All** button to select all the persons displayed on the screen as recipients of this email.

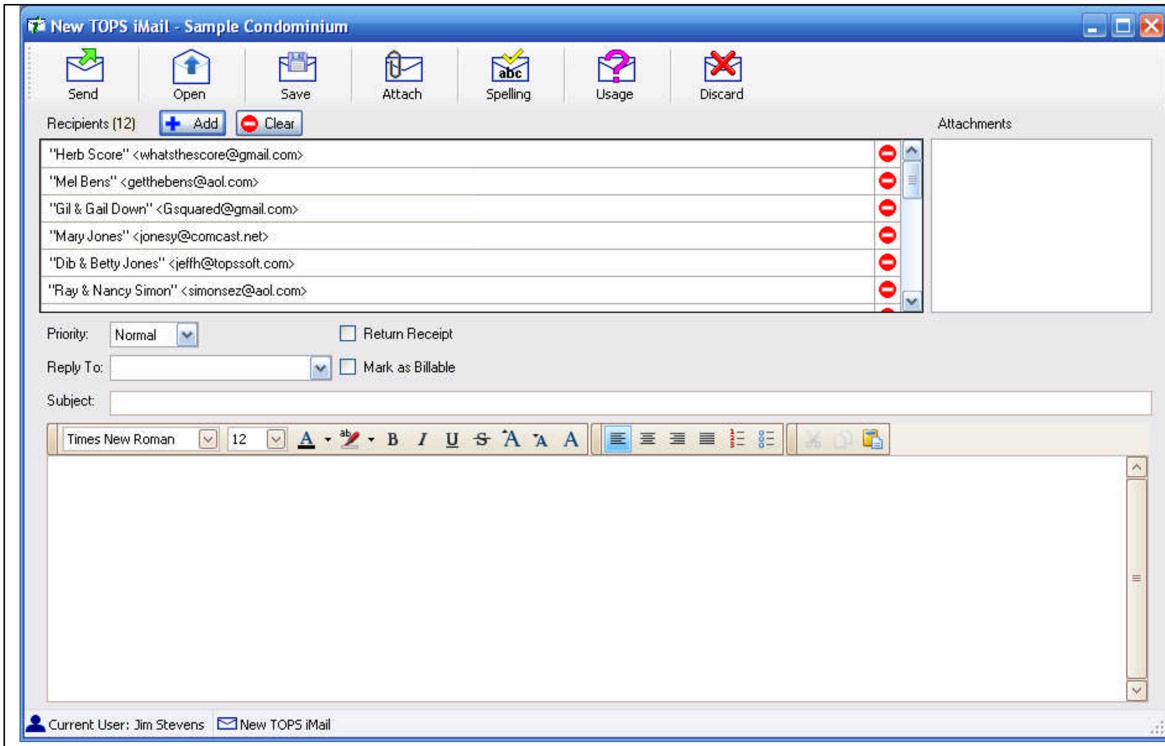
Click the **Clear All** button to delete all the recipients so you can start the selection over again.

Click the **Proceed** button after selecting the Recipients to return to the Compose Email screen where you can continue with the next steps for sending a mass email.

Click the **Cancel** button to exit from the Select Recipients screen without proceeding with the mass email.

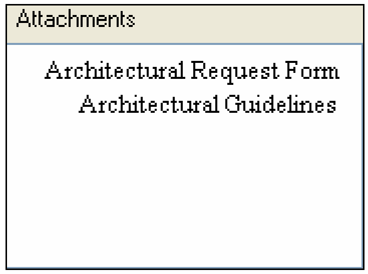
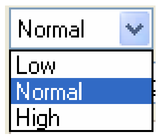
If you clicked the **Proceed** button on the Select Recipients screen, you will return to the email screen ready to complete the mass mail. It will look like this:

Recipients Selected—Compose Email



Now you are ready to complete the remaining fields on the Compose TOPS iMail screen and type in the message you wish to send.

	Click the **Clear** button to erase all the email Recipients previously selected. You can then start over selecting Recipients.

Attachments	Click the **Attachments** button to attach documents or forms to this email, they will show in the Attachments box.  This box will show you the name of any **Attachments** to the email you are getting ready to send. You can have multiple Attachments to each email that will be received by each recipient. For more details on Attachments, see the Attachment section below.
Priority	You can set a Priority level for this email. By default, the Priority level is Normal, but you can click the down browse arrow to view the other choices:  If you select the "High" priority, the recipient will see the email marked as a high in their email inbox.
Return Receipt	Checkmark this box to request a **Return Receipt** from the recipient. If the recipient allows it, the Return Receipt will be sent back to the Reply To address in the email.
Reply To	The **Reply To** will default to the email address from the User Settings & Preferences above. You can select another Reply To email addresses from the Management Company Settings by clicking on the down browse arrow . You can also manually enter a different Reply To address if you wish.
Mark as Billable	Checkmark this box if the email should be charged to the community as an expense owed to the management company. You can print a Communication Summary Report showing all the **Bill To Community** mailings for a month whether it was printed or emailed communication which can backup a reimbursement payment from each community.
Subject	Like any email, you can enter a brief summary description letting the recipient know what the email is about. The **Subject** of every mass email is stored in the Communication History for each owner or vendor.
Font Toolbar	You can put effects into the body text of the email. Notice this tool bar above the email body:

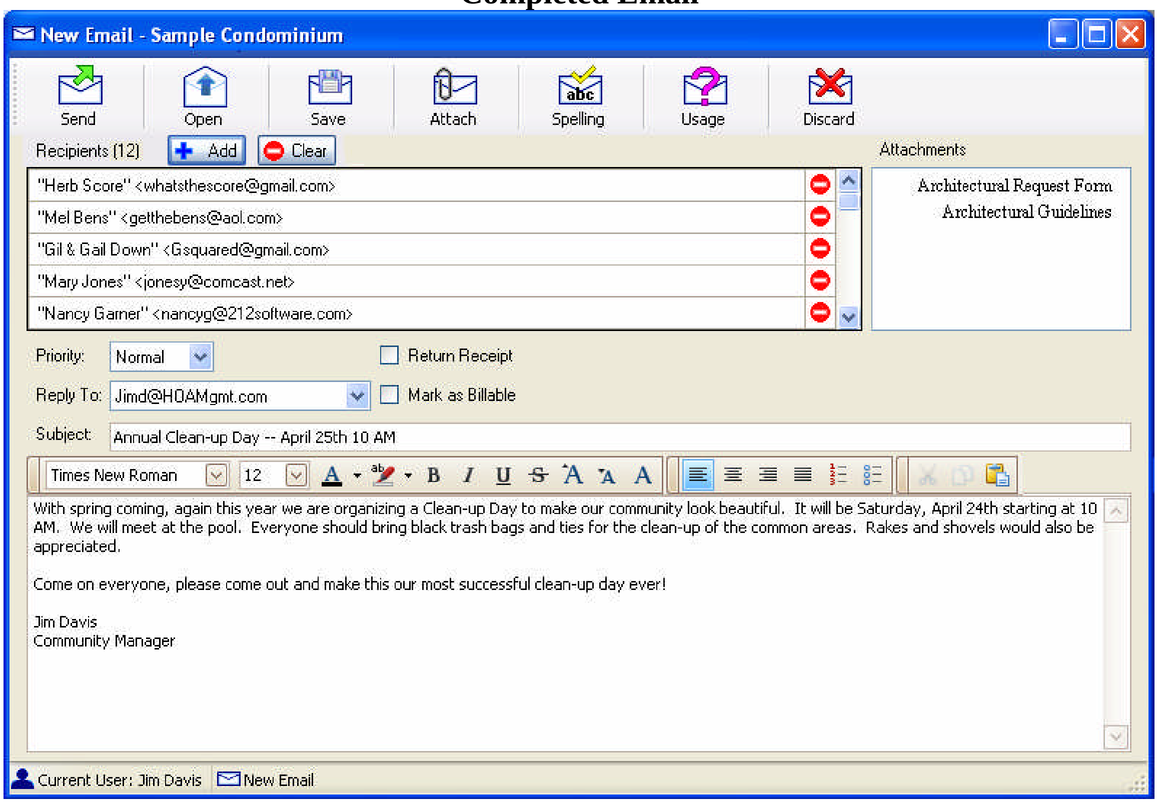
Much like a word processor, through the font toolbar you can change the font style for the body text, the point size, the text color, italics, underlining, text alignment, number lists, bullets, and editing tools like cut and paste.

Tool Tips: When you run the cursor over one of the symbols on this toolbar, a tool tip pops-up to explain the function.

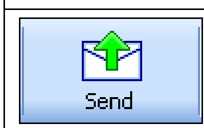
Email Body	This is where you can type the complete message you wish to send to the email recipients. It works just like any normal email. You can type a complete, free form email with any message you wish. Using the font toolbar above, you can "dress-up" the email body with different effects to make it more appealing to read. Simple highlight the body text, then use the effects from the font toolbar. Once you have completed typing the body of the email, we suggest you click the **Spelling** button to have your email "proofed" before sending it.

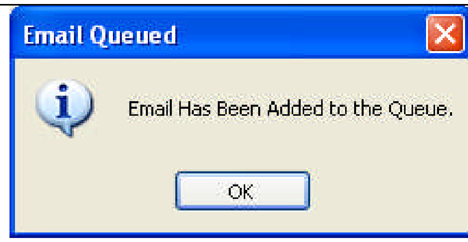
A completed owner email would look like this:

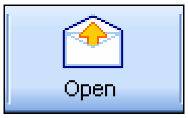
Completed Email



Now we will discuss each of the button functions on the Compose Email screen.

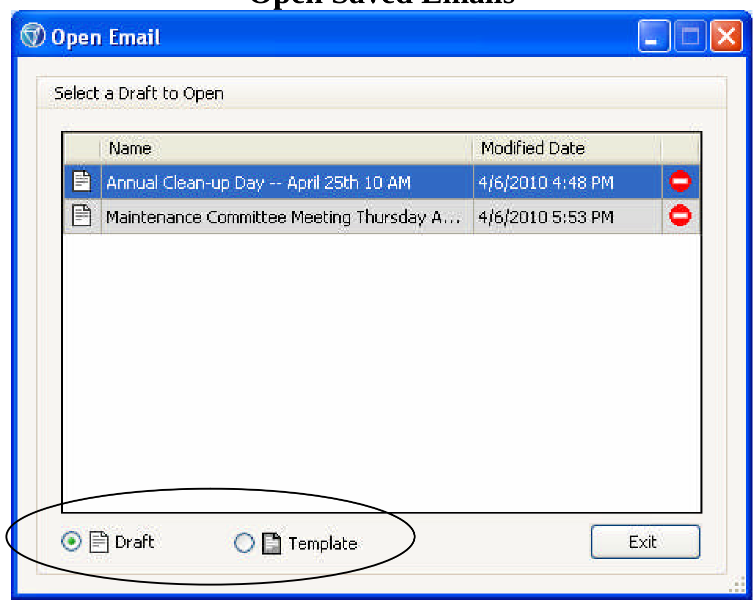
	Click the **Send** button once you have composed the email, selected the recipients and added attachments, if any. This places the email into the outgoing mail que where it will be sent by the TOPS iMail system. You will see this message confirming your emails have been placed in the outgoing mail que:

<table>
<tr><td></td><td>


Click the OK button to clear the message.
</td></tr>
<tr><td colspan="2"><u>Drafts & Templates</u></td></tr>
<tr><td>


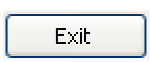
</td><td>
Click the Open button to retrieve saved Email Templates or Drafts.

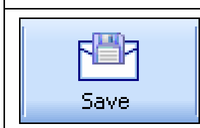
Open Saved Emails



By default, it shows saved Drafts. But you can simply click the radio button next to Templates to see any saved templates.

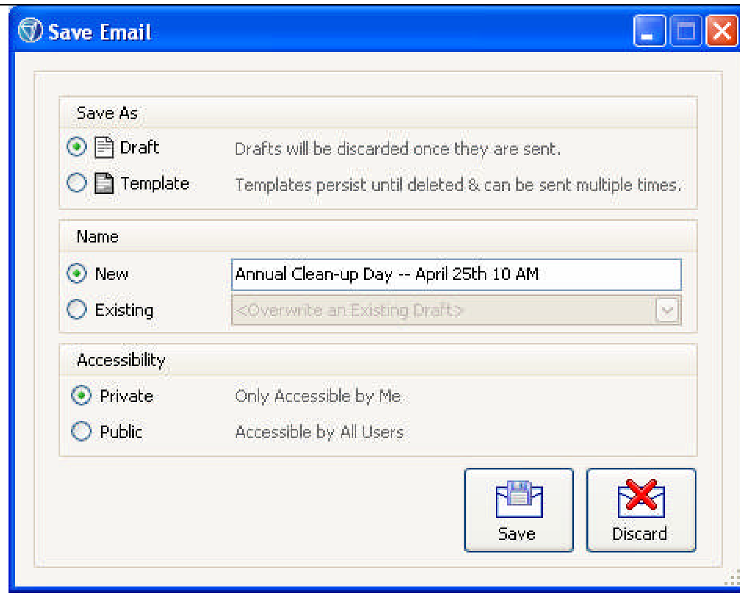
Double click on the saved email you wish to Open.



Click the Exit button to exit without selecting a saved email.
</td></tr>
<tr><td>


</td><td>
Click the Save button to save the email on the screen as either a Template or a Draft. You will see this screen:

Save Email
</td></tr>
</table>



Save As - You have two options here:

Draft – Saves the email with ALL the information as displayed INCLUDING the Recipients. Once you Send a Draft, the email is deleted from the Save folder so you cannot use it again.

Template – Saves the email with the selected Recipients, Subject, Body Text and Reply To fields. You can re-use a template over and over. It is not deleted when sent, like a Draft, it stays in the Save folder until you delete it. If the Recipients change, simply click the Clear Recipients button on the Compose Email screen, then select the new Recipients.

Name - There are two options here:

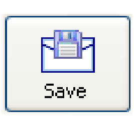
New - By default, it displays the Subject line of the email, but you can type over that to change the name if you wish.

Existing – If you opened a Saved email, you can make changes to it, then Save it in place of the original under the same name. This will overwrite the original with the changed email.

Accessibility - There are two options here:

Private – Only the current user who created the email can Open it, make changes to it, Save it and Send the email.

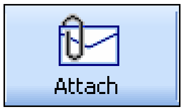
Public – Any user who has access to this community can Open the email, make changes to it, Save the changes or Send the email.



Click the **Save** button to Save a Draft or Template.

Click the **Discard** button to delete the email showing on the screen—either a Draft or a Template.

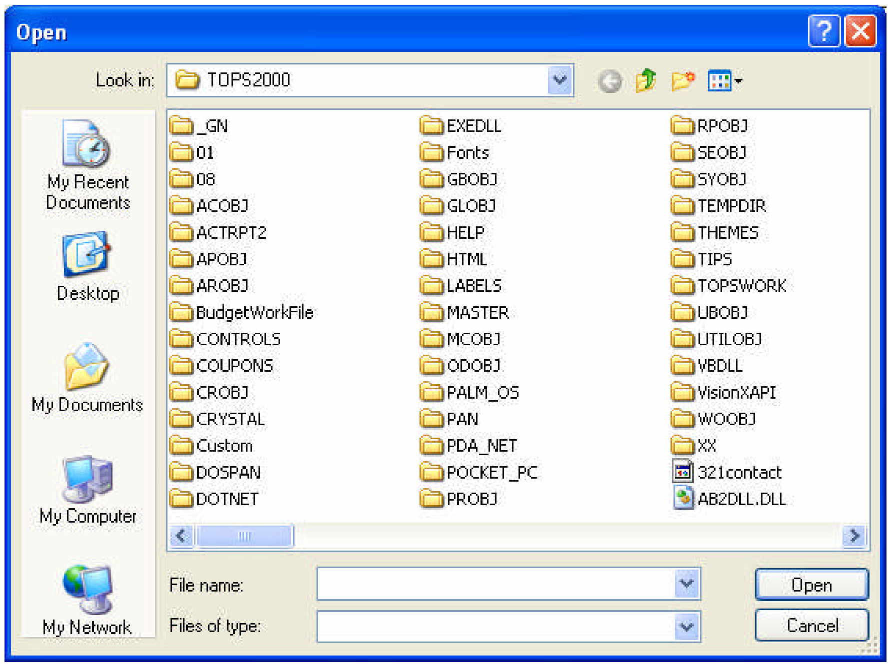
Attach Files



You can **Attach** any file or document to an email. There can be multiple attachments as well. Click the **Attachment** button to open a browse screen where you can select a file(s) or document(s) to attach to the outgoing email.

The browse screen looks like this:

Attachment Browse



When you locate the file or document to attach, simply click on the **Open** button. The attachment you select will show on the Compose Email screen within the Attachment box.

> **Hint:** We recommend sending Portable Document Format (PDF) attachments wherever possible rather than a Word® document or Excel® spreadsheet. With Word® or Excel®, the recipient must have these applications in order to open the attachment, plus, the recipient could make changes to what you send. If you send attachments in PDF format, the PDF viewer is widely available and *free*. The recipient *cannot* change a PDF attachment.

Using Spell Checker

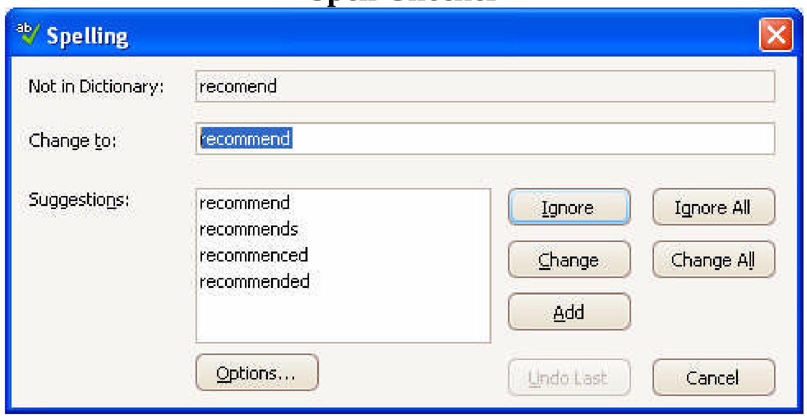
The **Spell Checker** is constantly working as you type the email. If it thinks you have misspelled a word in either the Subject or email body, it will underline it with a wavy red line. However, as a double check, you can also click the **Spelling** button to check the Subject and body of the email once you are done writing the email. If a misspelling is detected, it will highlight the word so you can correct it.

> **Hint:** To add a misspelled word to the dictionary, right click on the word the Spell Checker has highlighted, then click the menu

choice – **Add to Dictionary**.

To check the entire body of the email, click on the Spelling button. If the Spell Checker finds a misspelling, it will pop-up a screen as follows:

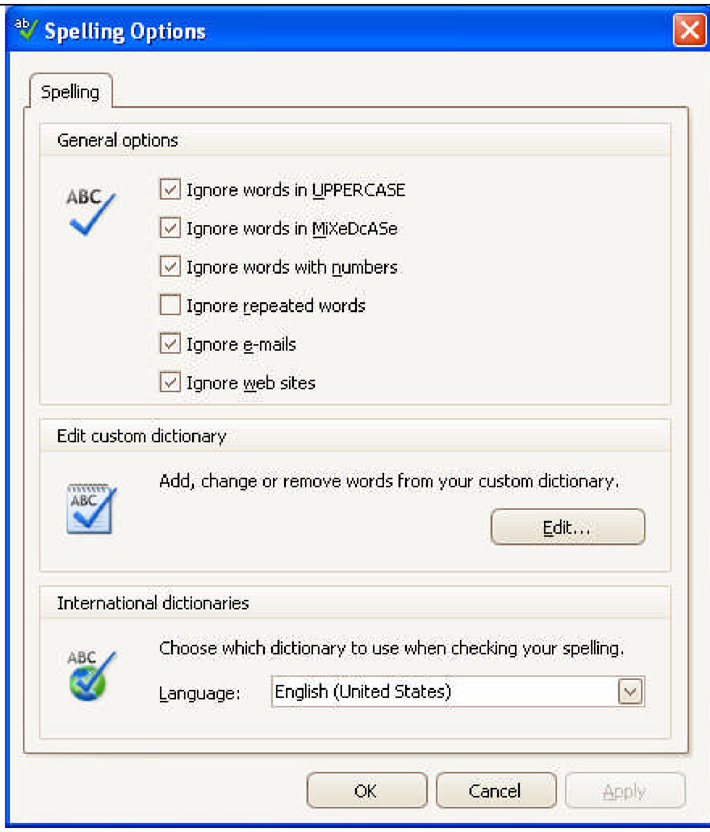
Spell Checker

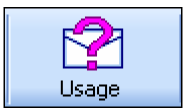


When Spell Checker finds a misspelling (a word not in it's dictionary) it will display the word and give you choices on how to handle it. The choices include:

- **Change To** – Displays what the Spell Checker thinks is the correct word from its dictionary.
- **Suggestions** – Language suggestions on similar words or variations on the correct spelling.
- **Ignore** – Click this button to accept the word as you spelled it in the email body.
- **Ignore All** – Click this button to ignore any highlighted words in the email body that Spell Checker cannot match in its dictionary.
- **Change** – Click this button to change the misspelled word to the one displayed on the **Change To** line.
- **Change All** – Click this button to change all highlighted, misspelled words to the proposed ones from the Spell Checker dictionary.
- **Add** – Click the Add button to add the misspelled word to the dictionary. It will then accept the word as you spelled it and not see it as a misspelling in the future.
- **Undo Last** – Click to undo the last spelling change in this email if desired.
- **Cancel** – Click Cancel to exit the Spell Checker.
- **Options** – Click Options to view Spell Checker features. The Options screen looks like this:

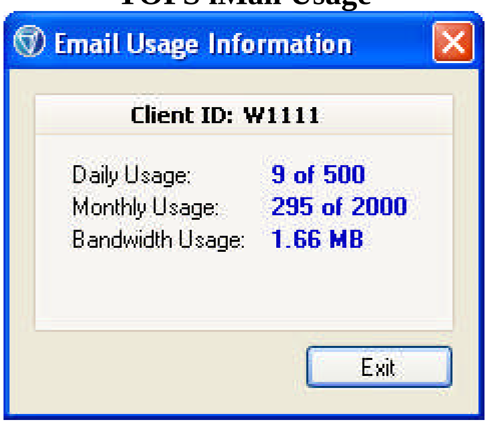
Spell Checker Options

<table>
<tr>
<td></td>
<td>


The Spell Checker is a simple, yet powerful, tool to make sure any misspellings or typos are caught before you send mass emails.
</td>
</tr>
<tr>
<td colspan="2"><u>TOPS iMail Usage</u></td>
</tr>
<tr>
<td>


</td>
<td>
Click the Usage button to see how many emails have been sent out this period. There are daily and monthly limits on outgoing email depending on the TOPS iMail plan selected.

TOPS iMail Usage



You can always upgrade to a higher plan by contacting TOPS Sales Dept at 800-760-9966.

Click the Exit button to return to the Compose email screen.
</td>
</tr>
</table>

<u>Discard Email</u>	
	Click the **Discard** button to permanently delete the email showing on the screen without sending it.

This completes the Setup and Use of the TOPS Mass Email. Next we will discuss the Communication History.

Communications History

Through this menu choice, you can view all the communications with owners and vendors in a community whether it was printed or emailed. It stores a complete history of all communications whenever you do a mailing, form letter or bill/statement.

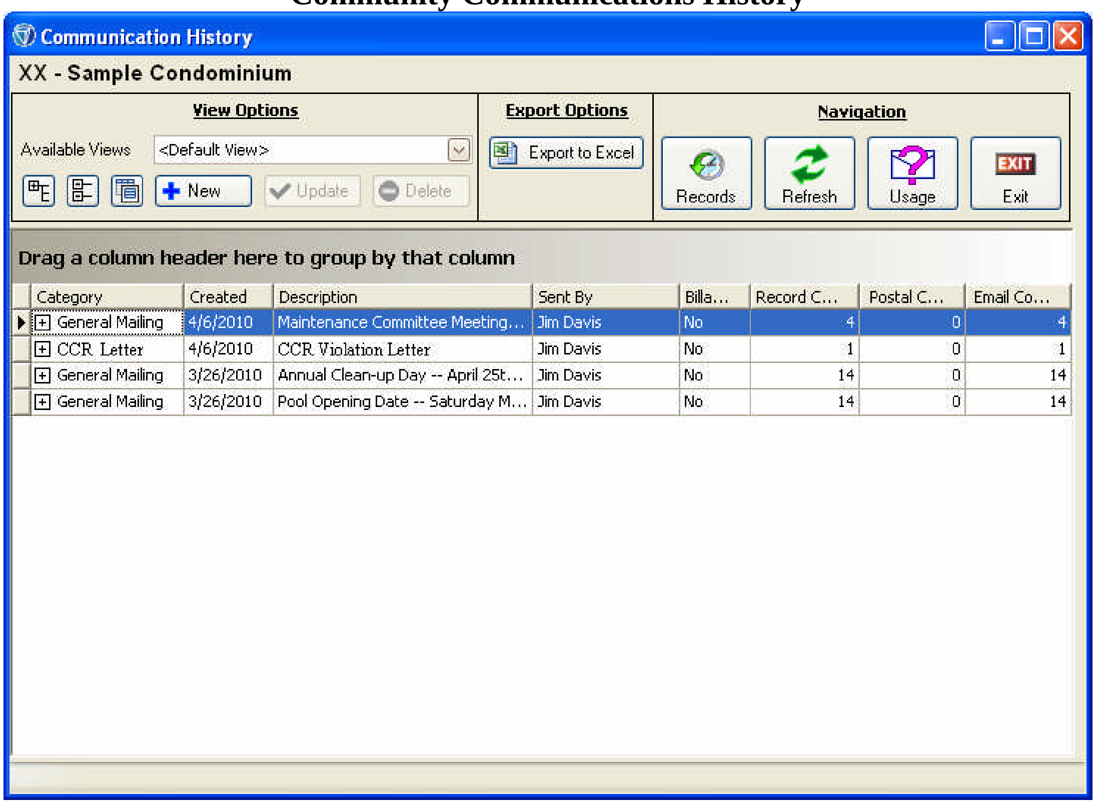
Mass mailings are automatically captured in the Communications History, even when printing mailing labels. The only communications not captured in the History are individual emails to owners or vendors sent through your existing email system (Outlook®, Outlook Express®, etc.). Email communications are not captured in the History unless you elect to use the TOPS iMail service to send them.

The Communications History has filtering capability so you can drill down into a particular mailing. You can also rearrange the columns showing on the screen to customize it to better fit your purposes and save that view so you can use it again.

Having a Communication History for each community will help protect you from claims that an owner or vendor never got a particular mailing. This is particularly important with emailed communications so you can prove an email was sent.

Click **Communications History** from the Communications menu to see the history:

Community Communications History

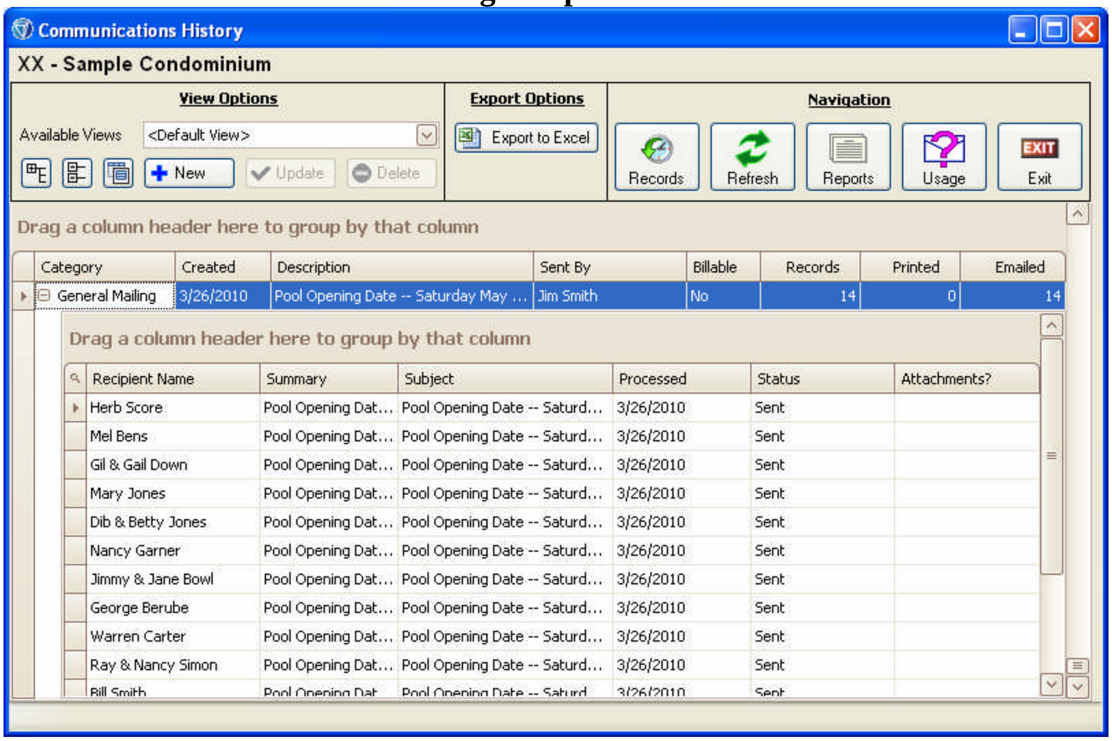


The Communication History shows ALL the outgoing mailings for the community in chronological order starting with the most recent and going backwards to the oldest.

Notice the ⊞ next to each mailing. To view the details of that mailing, including the

Recipients, simply click on the plus + sign. It will open the details below like this:

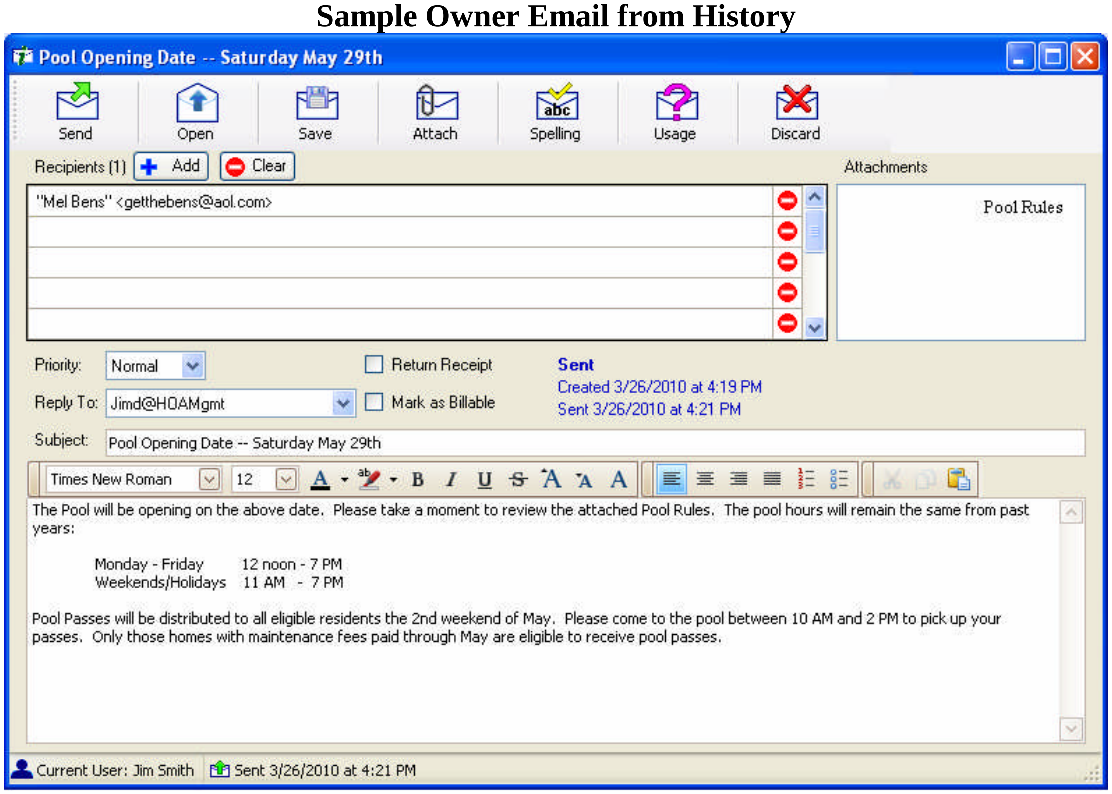
Mailing Recipient Detail



When the History is expanded showing the recipients, click the ⊟ next to the mailing summary line to return to the summary view.

When in the expanded view, double clicking on an individual recipient will open the details of the mailing, such as, the email sent to that person.

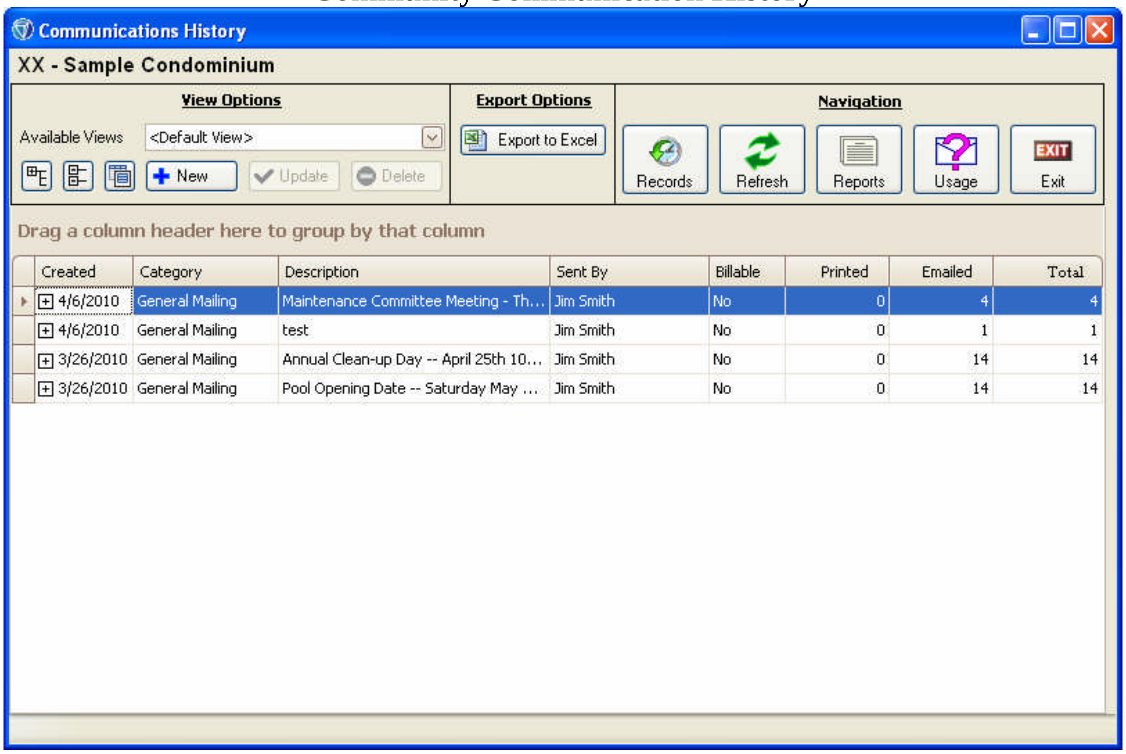
Sample Owner Email from History



Click the **Exit** button to return to the History view.

Now we'll return to the Communication History summary screen:

Community Communication History



We'll review the rest of the functions on this screen.

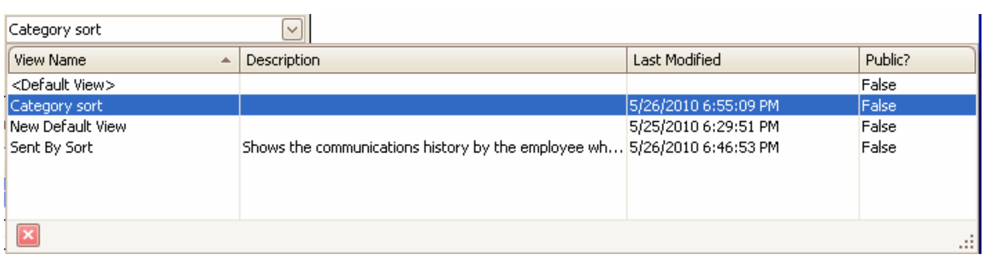
View Options

Available Views

This opens to the "Default View" which is normally the view most TOPS users would find most useful. However, the History screen has an advanced "drag & drop" capability meaning you can move around the columns and add new columns not displayed on the "Default View" to create a custom view, then save that view under a name you assign so you can call up that view again in the future.

Select View

Notice the down browse arrow next to the "Available Views" heading. When you click this, all the available views will open including any custom views that have been created:



Simply double click to load any of the available History views shown. If this is the first time you are opened the Available Views, you might only see the "Default View" which is always there.

Customize View

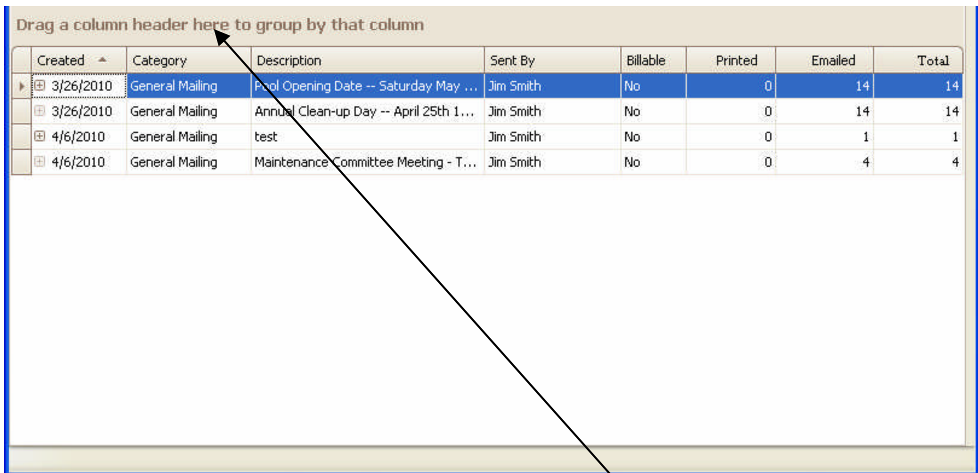
You can take the “Default View” or any existing view and customize it into a new, custom History view. There are two ways you can create custom History views. You can make change to the following:

- Sort Order
- Column Order

Sort Order

To change the sort order, let’s start with the default view:

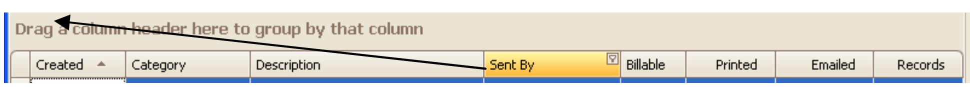
Default View

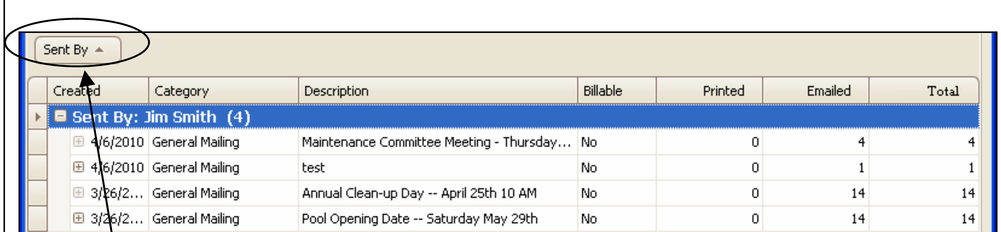


Notice the area above the grid where it says –

“Drag a column header here to group by that column”

To change the History view showing on the screen, simply drag a column heading up above the grid using the mouse and “drop” it there like this:





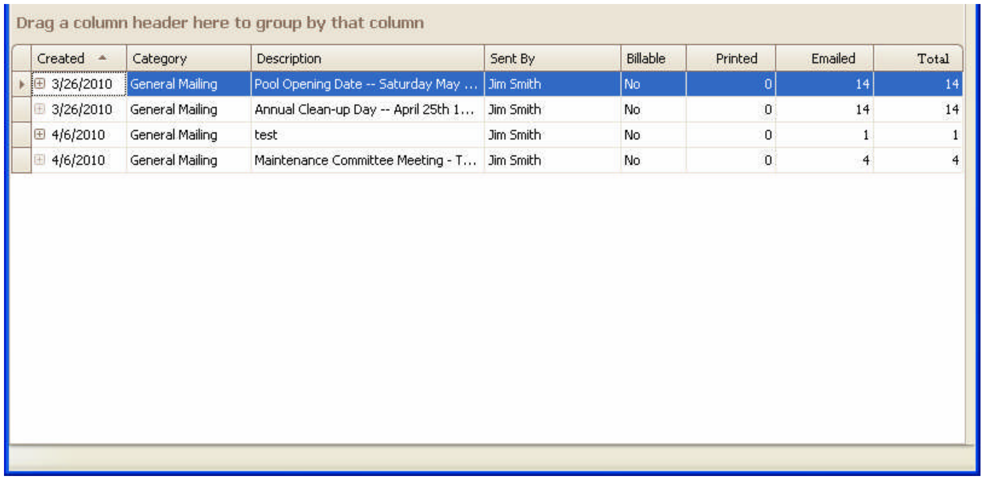
The “Sent By” column is dragged to the customize area above the grid, which then changes the sort order so the History is now organized by the person who sent out the mailing.

Column Order

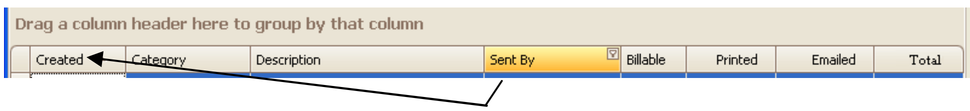
To change the column order displayed on the screen, let’s start with the default view:

<table>
<tr>
<td></td>
<td>

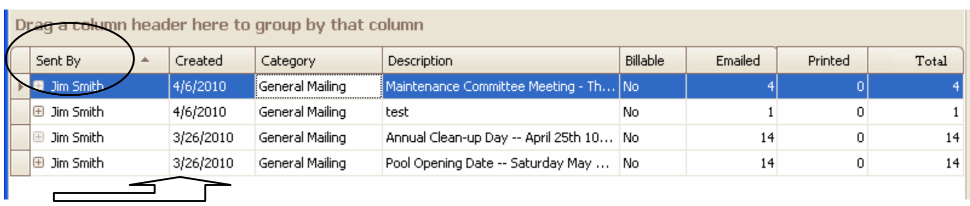
Default View



To change the column order showing on the screen, simply position the mouse over it, click the mouse button to “grab” it, then move it to the column position you wish like this:

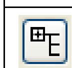


Now the first column is “Sent By” and that becomes the main “sort” column.

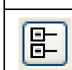


As you can see, the “Sent By” is now the first column and the “Created” has been moved over to the 2nd column position.

Being able to customize your views of the History, then save a custom view to use again makes this a very powerful tool that you will find many uses for as you work with the Communication History.

</td>
</tr>
<tr>
<td></td>
<td>

Full Expand – Shows all the recipients under each mailing for the entire history.

</td>
</tr>
<tr>
<td></td>
<td>

Full Collapse – Reverts all the mailings to a summary view.

</td>
</tr>
<tr>
<td></td>
<td>

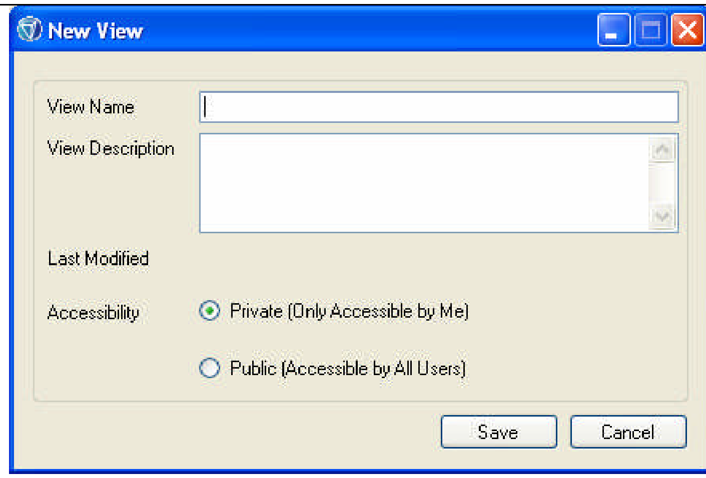
Choose Columns to Show/Hide – Drag History columns to this box to hide them so they no longer show on the History screen.

</td>
</tr>
<tr>
<td>
</td>
<td>

Click the **New** button to create a History view different from the default view using the drag and drop customizing features shown above.

When you create a new History view, you will see this screen:

</td>
</tr>
</table>

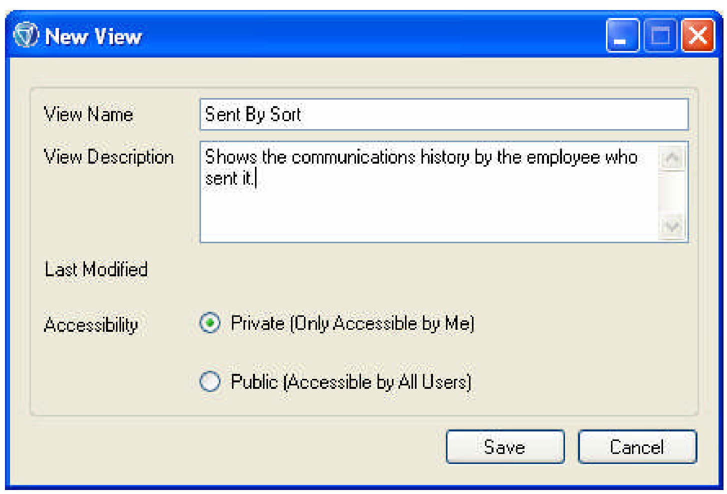
<table>
<tr>
<td></td>
<td>


View Name - You must complete the View Name field. This will be the saved view format.
View Description – an optional field where you can enter a fuller description of this saved History view.
Accessibility – There are two choices here:

Private – means only you as a TOPS user, can select this saved History view.
Public – means any TOPS user, can select this saved History view and use it.

Save – Click the Save button to save the History view.
Cancel – Click the Cancel button to exit without saving the History view.
</td>
</tr>
<tr>
<td>

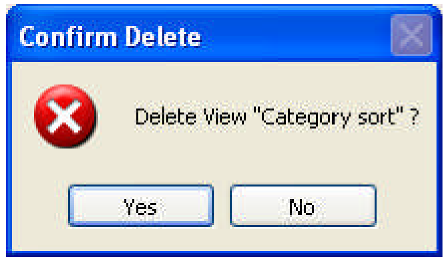

</td>
<td>
Click the Update button to make changes to the currently displayed View Name or the other information about this view. If you click the Update button, you will see this screen:



You can make changes to the custom History View information here.
Save – Click the Save button to save the History view changes.
Cancel – Click the Cancel button to exit without saving any changes.
</td>
</tr>
<tr>
<td>


</td>
<td>
Click the Delete button to make delete the currently displayed custom History View. Using Delete will completely erase it so this View does not
</td>
</tr>
</table>

exist. You will see this confirming message:



Yes – Proceeds to delete the selected History View.

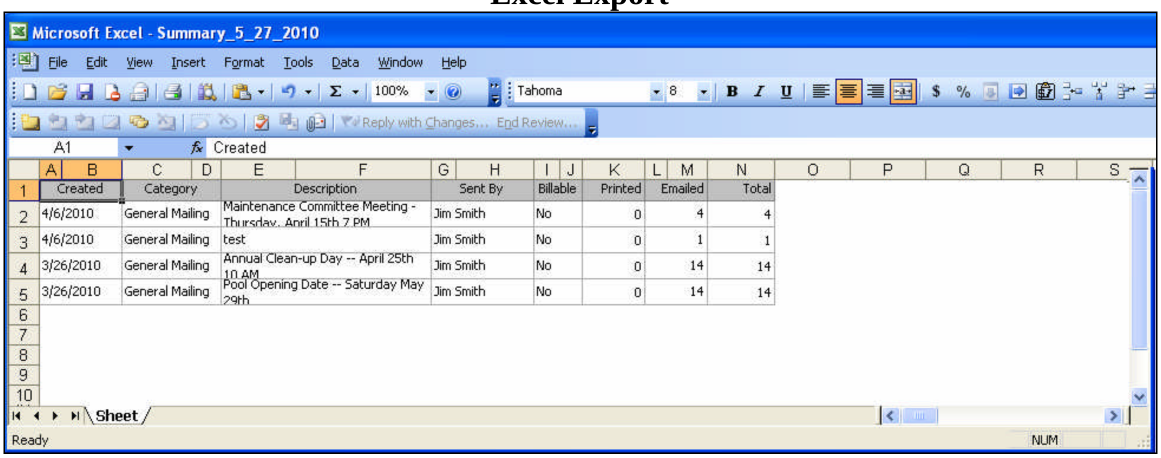
No – Exits from the delete function leaving the History View "as is".

Export Options

The Communications History can export the current History view directly into Excel®. To export the current History view into Excel, simply click on the **Export to Excel** button.

Whatever History view is showing on the screen will be exported to Excel® when you click this button. Excel® will open showing the exact same History data like this:

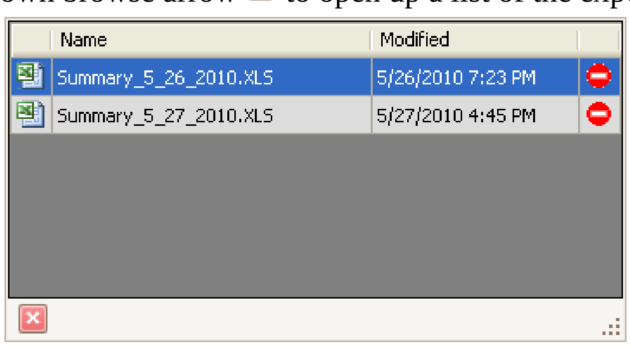
Excel Export



From here, you can work with the report and make changes just like with any normal Excel® spreadsheet. Be sure to save the spreadsheet before closing Excel®.

If there are exported Excel® spreadsheets already for this community, you will see the file selector under the Export to Excel button.

Click the down browse arrow to open up a list of the exported files:



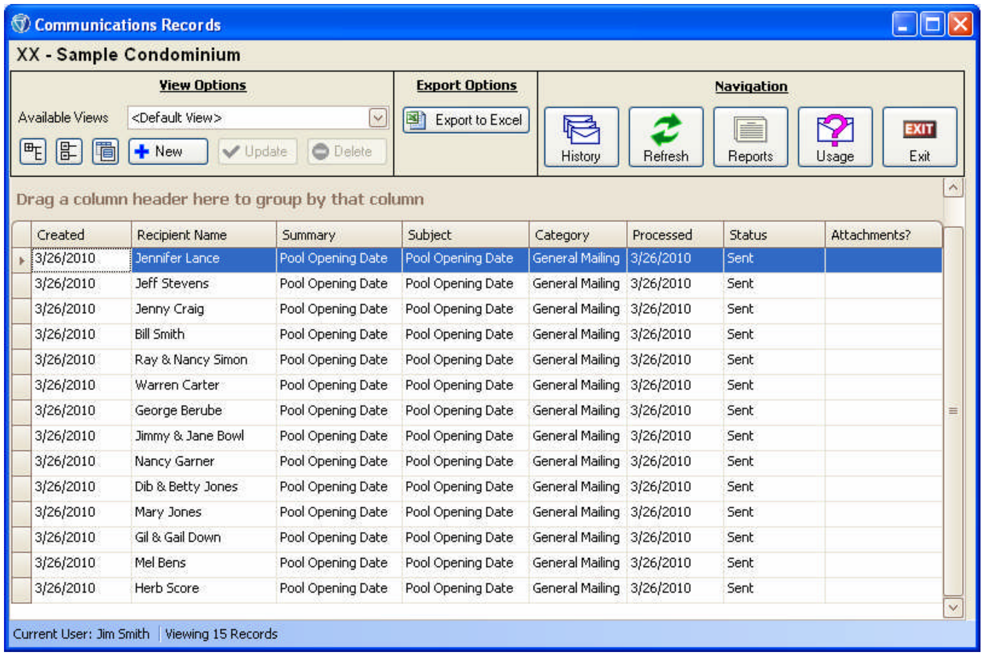
Simply double click the Excel® symbol next to the export file you wish to open.

Click the Delete symbol next to the export file to delete it.

Navigation

Click the **Records** button to expand the Communications History to show all the recipients of the communications. It will show all the details of the communications like this:

Record View



Notice there are more columns of information including the **Status** and whether, for emails, there were any **Attachments**.

Click the **History** button to return to the normal Communications History view.

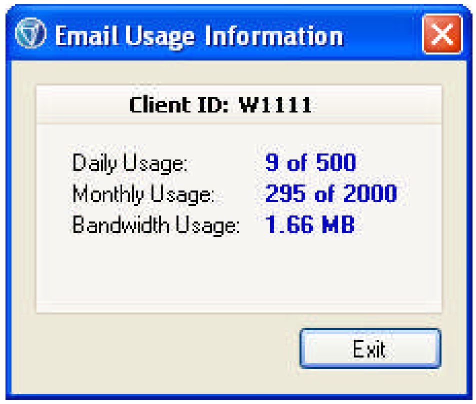
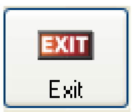
Click the **Refresh** button to update the information showing on the Communications History. For example, if you have a batch of emails in the mail que that are being processed and you might want to Refresh the History to check on the status.

Clicking Refresh will always give you the most up-to-date view of the Communications History for a community.

Click the **Reports** button to get a Communications Summary report for this community. You can print the report for a date range. The Communications Summary report gives you these 3 “Include” options:

- All Communications
- Bill to Community Only
- Not Billed to Community Only

With the “Bill to Community” report option, it should help management companies make sure they recover their mailing expense.

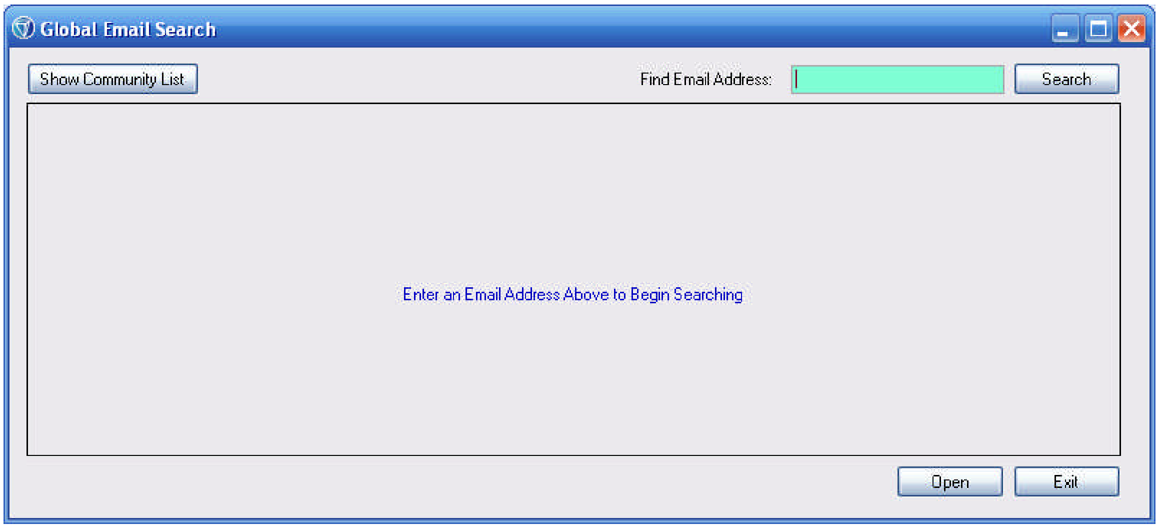
	Click the **Usage** button to see the usage of TOPS iMail, not printed communications.  It shows the usage both for today and for this month and let you know where you are compared to the TOPS iMail plan limits you selected. Click the **Exit** button to return to the Communication History screen.
	Click **Exit** to return to the Communications Menu.

Email Address Search

Use this handy search to find the owner that goes with an email address. Enter a complete email address or any part of it to find matching owner records. This is a global search, meaning, it will search the email address across ALL communities.

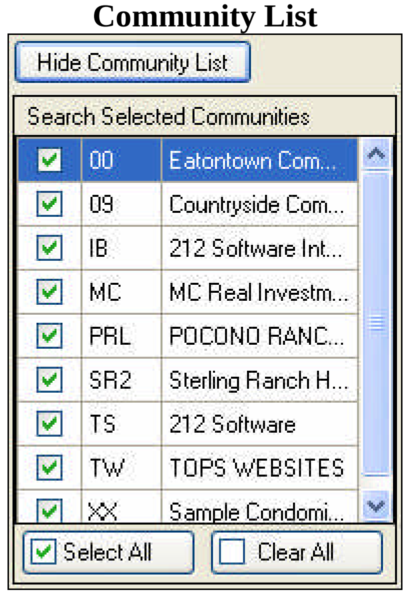
Click the **Email Address Search** on the Communications Menu. You will see the search screen:

Email Address Search



Bu default, the Search Email Address is global. Click the **Show Community List** button if you wish to search for email addresses for only one particular community or just a group of communities. It will open a community browse list like this:

Community List

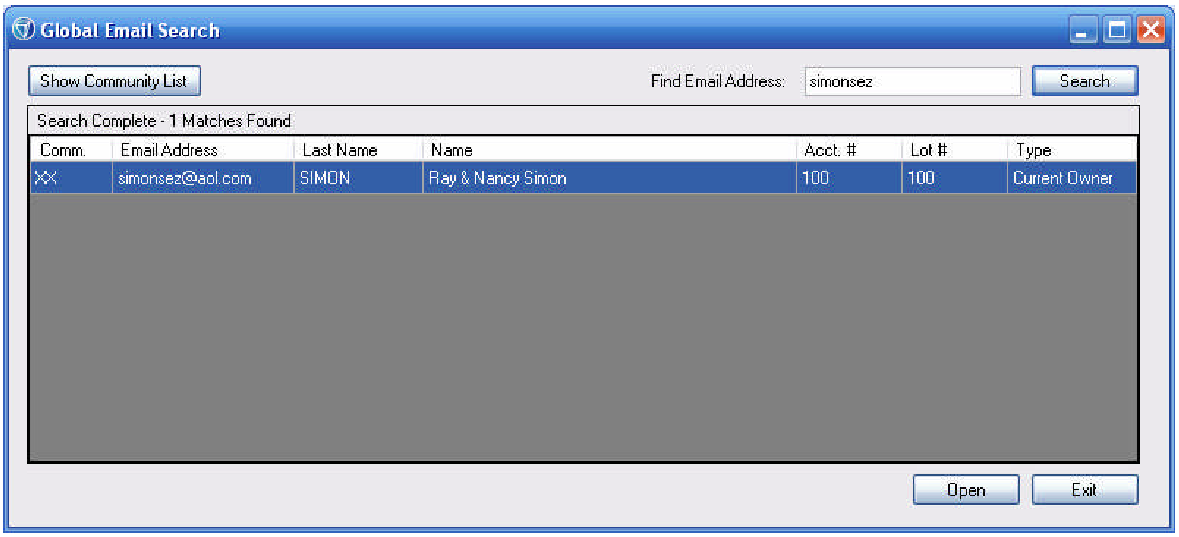


Select All – This is the default when you open the Community List. It will automatically search for an email address globally

	across ALL communities. **Clear All** – click this button to clear the checkmarks next to each community. You can then click to check those communities you wish to search for an owner's email address.
Find Email Address	Type the owner email address or any portion of it to find any matching owners.
	After typing the owners email address, click the **Search** button.

The search results will look like this:

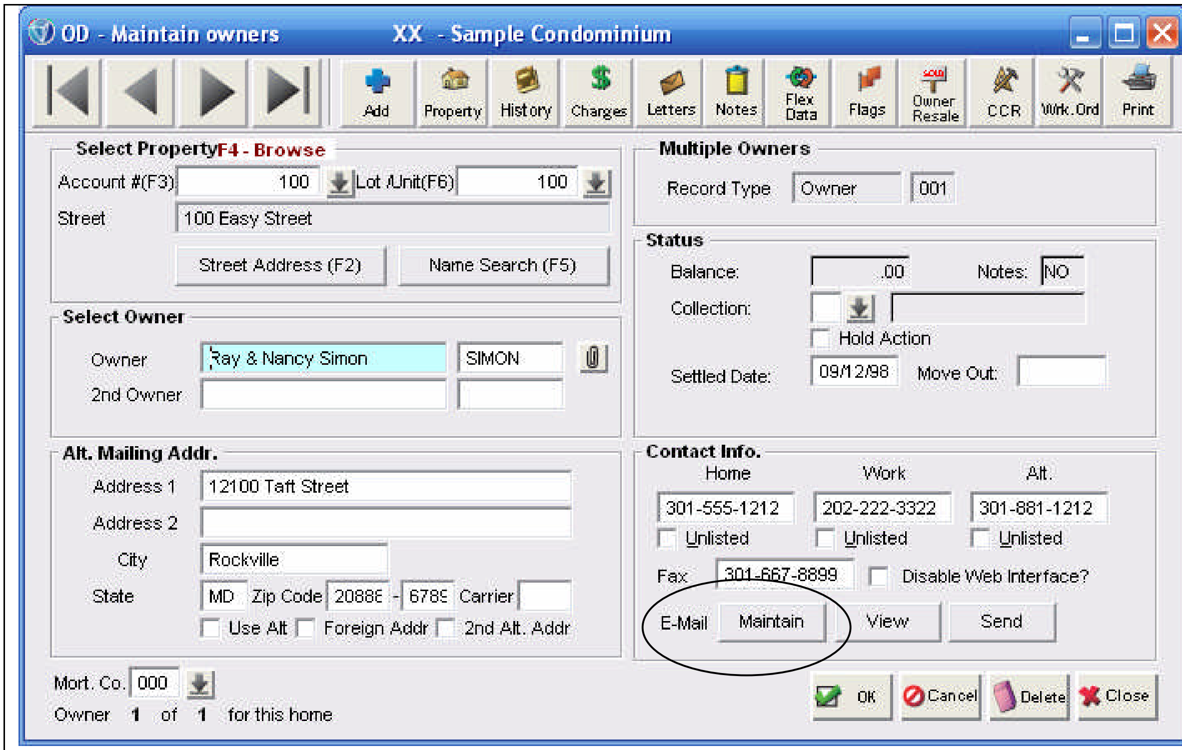
Search Results



To select the owner, simply double click on them or if they are highlighted, then click the **Open** button.

When you select an owner from the Email Address Search, it will take you to the Maintain Owner screen for that owner:

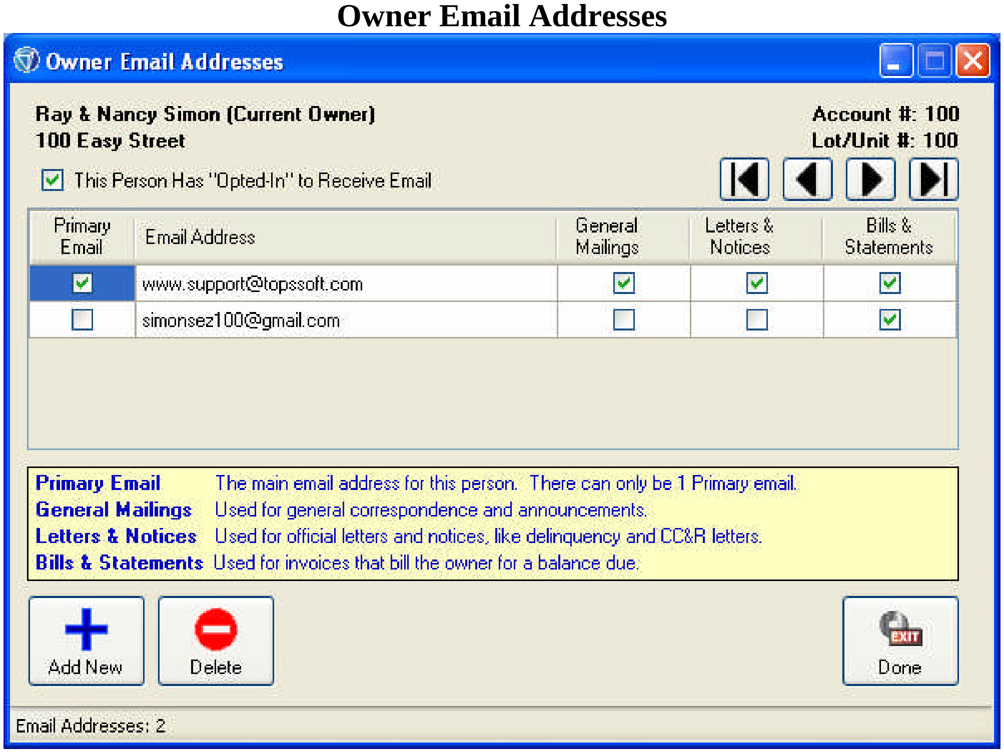
Maintain Owner



From here, you can access any information about this owner.

If you wish to change the owner's email address, click the **Maintain** button. You will then see that owner's email addresses:

Owner Email Addresses



Click Done to return to the Maintain Owner screen.

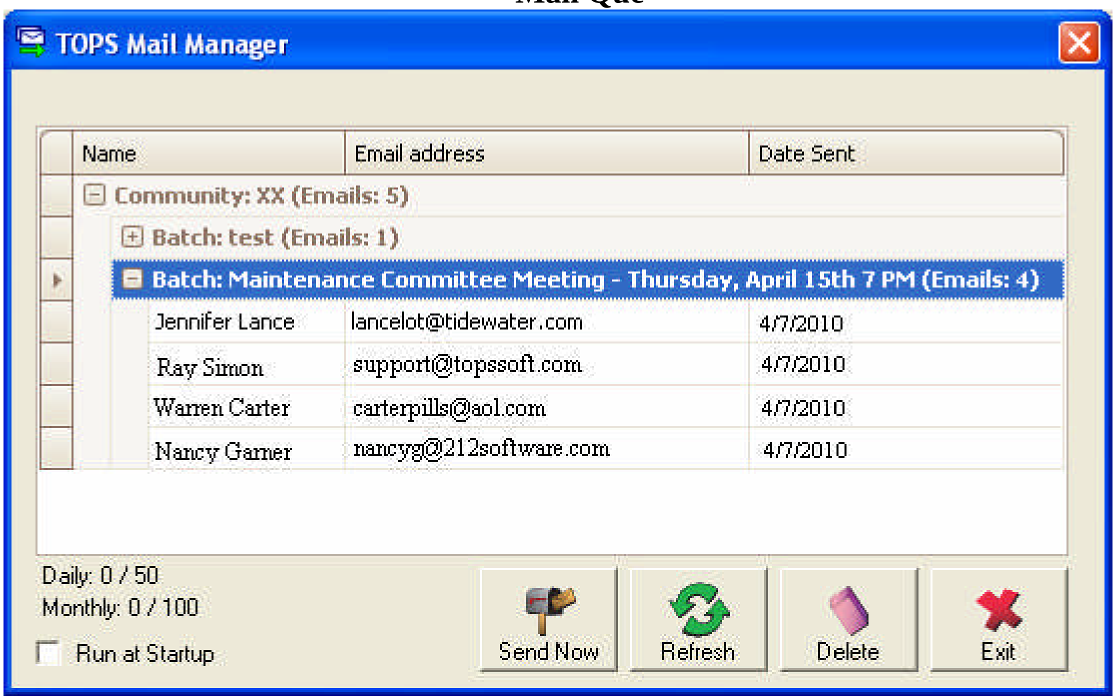
TOPS iMail Manager

This is actually the outgoing TOPS iMail que for emails that are in the process of being sent. As emails are sent out, they disappear from the outgoing mail que. Only pending email batches that have not been sent show on this screen. If the screen is empty, there are no email batches pending.

The TOPS iMail Manager is global, meaning, it shows ALL pending email batches from ALL communities. You can tell the TOPS iMail Manager to send out a particular pending batch before other outgoing batches using the Send Now button. We'll explain the options with the TOPS iMail Manager below.

When you click the **TOPS iMail Manager** menu choice, you will see the mail que:

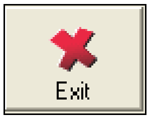
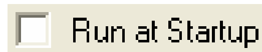
Mail Que



Notice the mail que shows the pending, outgoing emails grouped by community, then the email batch(s) under that community. You can further drill down into the individual recipients within each batch. Use the plus button ⊞ to expand to see the recipients or the minus button ⊟ to collapse back to just summary info.

Next, we'll cover the other options showing on the TOPS iMail Manager screen.

	Click **Send Now** to immediately begin sending a select email batch before any other pending email batch or to select one recipient and send that email immediately.
	Click the **Refresh** button to see the current status of the mail que.
	Click the **Delete** button to delete a selected email batch or a particular recipient. However, if you click Delete for an outgoing batch and some of the emails in that batch have already been sent, there is no way to retrieve

	the sent emails and delete them—it will only delete the emails still left in the batch that have not been already sent.
	Click the Exit button to exit from the TOPS iMail Manager.
Run at Startup	Notice this checkbox at the bottom of the TOPS iMail Manager screen:  Check marking this box means you want the TOPS iMail Manager to run whenever you workstation is turned on. Since it can take some time to send outgoing email batches, it is probably a good idea to checkmark this option so that pending emails continue to be sent out as long was your computer is turned on—regardless of whether TOPS is active or not. **Recommend:** Always checkmark this box ☑

This concludes the manual section on the TOPS iMail Manager. It also concludes the manual section on the TOPS Communications suite.