

**Generate Portal Login Letters**

*For owners we don't have an email address for.*

- 1) Select an Association > navigate to the **Homeowner List**
- 2) Use the 3 dots at the top of a column to add the **Logins** column
  - Sort the Login column Ascending
  - The units with no information in the Logins column should be grouped together
  - Use the check boxes on the left side to select the units without an existing Login
- 3) Once they're all selected, click on the **Bulk Action Item** button
  - Choose the **General Mailing** action item
  - The Step defaults to Send Letter. Leave as is
  - Click the **Update** button to begin generating the letters
  - No need to do anything else on this screen

Homeowner List - (999) Presidential Valley

Manager

+ New Property/Lot  Previous Owners Only Owner Tags...  Export to Excel **Bulk Action Item**

<input type="checkbox"/>	Account #	Homeowner	Address	Logins ↑	Phone
<input checked="" type="checkbox"/>	99910002	James Monroe Elizabeth Kortright Monroe	P: 1817 Pennsylvania Ave Unit 303 M: 123 Main St		
<input checked="" type="checkbox"/>	99910003	William Harrison Anna Tuthill Harrison	P: 1841 Pennsylvania Ave Unit 307 M: 1841 Pennsylvania Ave Unit 307		
<input checked="" type="checkbox"/>	99910008	James Madison Dolley Madison	P: 1809 Pennsylvania Ave Unit 312 M: 1809 Pennsylvania Ave Unit 312		

*Wait several minutes*

4) Navigate to **Mailroom > Print Queue**

- Use the 3 dots at the top of a column to add the **Association** column
- Search by Association to find only these letters
- Use the check boxes on the left side to select these letters
- Click the **Print button**
- Your screen should switch to the **Jobs tab**
- You may need to click the **Refresh** button in the bottom right corner
- Find your name/print job

Print Queue

Queue Jobs Third Party Orders

Include Mailing Labels  Print Preview **Print** Send to South Data

↓ Association X

<input checked="" type="checkbox"/>	XN	⋮	Association	⋮	Category
			president		
▼ Presidential Valley (Count: 3)					
<input checked="" type="checkbox"/>	454815		Presidential Valley		General Mailing
<input checked="" type="checkbox"/>	454814		Presidential Valley		General Mailing
<input checked="" type="checkbox"/>	454813		Presidential Valley		General Mailing

5) **Download** the file

6) **PRINT 2 SIDED**

- the address block is formatted to fit into the window envelopes – no labels needed
- the 1<sup>st</sup> page contains the owner’s unique portal key/personalized information
- the 2<sup>nd</sup> page is just default instructions – the same for every owner
- in the corporate office, print to GHCM. Postage is also charged to GHCM

7) Repeat for each association.