**Generate Follow-Up Letters for Property Owners**

1. From the ***Record List*** > select ***Record List Filter*** called ***Annual Service Master – Letters***.



The filter uses the following criteria:

**Status** = Active *(this will eliminate Master records that are Void, Withdrawn, In Enforcement, etc).*

**Expiration Date** = 12/31/[current reporting year] *(this is very important so that you only send letters to those Master records that are due for an annual inspection for the current reporting year).*

**Record Type** = Onsite/Annual Service/Master/Comprehensive *(you will be sending letters from the Master record with the current Property Owner on file).*

**System Type =** [all System Types, except Holding Tank]

1. From the new list of records, hover over ***Create a Set*** > click ***Select All and Create a Set***.



1. Enter the following information > click ***Submit***.

**Set ID** = [descriptive as you like – for internal use only]

**Set Name** = [descriptive as you like – for internal use only]

**Set Type** = Onsite Renewals *(this must be Onsite Renewals so that you can execute the appropriate letter script)*

**Comments** = [descriptive as you like – for internal use only]



1. Open the newly created ***Set*** from the ***Set*** ***page***.



1. Click on ***Set Member*** > hover over ***Execute Script*** > click ***ONSITE*** ***RENEWAL LETTERS TO OWNERS***.

***\*Warning\* This will generate a letter, email it to the Owner (where available), and update the workflow on the Master record.***



1. The script could take a few seconds to a few minutes to finish executing. You will know when the script has finished because the screen will refresh and a popup window with an output of the script will display. The output displays the actions for each record in the Set.

**Emailed Letter:** The script first tries to email the letter to the Owner if an email address exists.

**Mailed Letter:** If an email address does not exist, the script will notify you that there are letters that need to be generated from the Set to print and mail through the postal service.

\*\* Note: There is a bug in the Accela software where you cannot execute a Set script two times in a row. If you have already executed a Set script, please log out and log back in again to execute this script.



1. The output will let you know if you should generate letters for physical printing and mailing through USPS, when an Owner email address was not available.



1. To generate physical letters for printing and mailing, from the ***Set Member*** page > check & select the first record in the list > hover over ***Reports*** > select ***Renewal Follow Up Letter ATT Systems from Set***.

Be sure to click ***Reports***, not Execute Script. These two look really similar to each other.

**Note: If you are not able to see the ‘Reports’ dropdown, open the Preferences page > switch your default module to Onsite > reopen the Sets page.**



1. Enter the ***appropriate parameter values*** > click ***Submit***.



1. The letters will be generated for all of the Owners that did not have an email address. Now, the letters can be printed and mailed out.



1. If you need to print out another copy of the letter, you can generate it from the ***Summary*** tab > hover over ***Reports*** > click ***Renewal Follow Up Letter ATT Systems***. Please note that if the letter was already emailed to the property owner, you will have to get a copy of the report from the ***Communications*** page.

