



## Addendum for SiteLink™ Mail Services



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## Overview

Accountable Document Solutions makes it easy to manage important outbound mail from within the Sitelink system. You can mail any letter, including Pre-Lien and Lien letters, first class or Certified, through outsourced Mail Services, and you can also create and print Certified Mail labels in your office and mail important notices right from your site.

**Two methods can be used:**

1. Create and mail Certified Mail letters with any content, directly from your property or corporate location. The system generates a USPS SCAN form so you get Proof of Acceptance without having to visit the Post Office.
2. Outsource the production and mailing of any sort of letter, whether First Class or Certified, through Client Mail Services. If you choose this option, you create your letter or invoice and direct it to Client Mail Services. The item is printed and mailed by a third-party Printer Partner. A copy is posted to your Mailing Services account at SimpleCertifiedMail.com where it is retained for 90 days.

| Mail Type  | On-Site | Outsource |
|--|---------|-----------|
| First Class  |         | Yes       |
| First Class with Certificate of Mailing                  |         | Yes       |
| Certified Mail with or without Return Receipt Electronic | Yes     | Yes       |

## Requirements

In order to use these convenient mailing services you must already have an account with Accountable Document Solutions. Sign up by visiting [www.SimpleCertifiedMail.com](http://www.SimpleCertifiedMail.com) and choosing “Sign-Up Now” or by calling 888-462-1750, extension 1, to speak to one of our sales representatives.

# Set-Up

These instructions assume you have an account on Simple Certified Mail.com and have received your User Name, Password, Client Code and Group Name.

1. Open Sitelink Web Edition
2. Go to Company/Setup Checklist and choose "Mailing Services".
3. Enter Client Code, Group Name, User Name, Password
4. Click "Verify Credentials"
5. Once the Credentials have been verified, proceed to the section on the left side of the screen called Certified Mail.

**Service Provider**  
SiteLink has partnered with Accountable Document Solutions (ADS) to bring you innovative, timesaving ways to:  
- Streamline the preparation, tracking and archiving of your Certified Mail.  
- Outsource your First-Class and Certified Mail.  
The ADS solutions are accessed from within SiteLink. To learn more, visit <http://www.accountabledocs.com/siteLink.shtml> or call 1-888-462-1750.

User Interface URL  
<https://accountabledocs.com>

Service Provider's Web Site

**Logon Credentials**  
A single ADS account supports both Certified and First Class mail.

ads Client Code  
ads Group Name  
ccrutchfield User Name  
adsrocks Password

Verify Account Credentials

**Services**  
**Certified Mail Labels**  
With the ADS web-based solution, you save significant time by printing a Certified Mail label, with address and postage, from any printer. Drop your Certified Mail in any mailbox and get proof of delivery the morning after delivery. Records are archived for 7 years.

**Certified and First Class Mail Outsourcing**  
We recognize that you can't afford to slow down your operation, even for important details. Outsourcing lets you get important mail out the door fast - by exporting letters for printing and USPS® Certified or First-Class delivery. All details are handled on your behalf through your ADS account, for letters and invoices.

**Letter Defaults**  
You can manually select the mailing method for your letter when you click the Mail Service button on a screen. You can also specify a default mailing method for any letter linked to a Past Due Event. When you select Certified Labels or Mail Services on the Past Due Tasks screen, the default mail method will be pre-selected.

The list below displays letters you have linked to Past Due Events. Select a letter and click Edit to set default Mail Service preferences for Past Due Task processing.

| Letter                            | Primary mailing   | Additional mailing |
|-----------------------------------|-------------------|--------------------|
| Past Due Notice                   | Certified w/RR    | First Class        |
| Cut Lock Notice                   | Certified         | First Class        |
| Lien Notice                       | First Class w/COM | First Class        |
| Insurance Cancellation Notice     | Certified         | First Class        |
| Default Notice                    | Certified w/RR    | First Class        |
| Second Lock Removal Notice        | First Class       | First Class        |
| Inventory List for Public Auction | Certified         | Not used           |

COM = Certificate of Mailing (available for First Class Mail)  
RR = Return Receipt (available for Certified Mail)

Preview Certified Mail Label

Refresh OK Cancel

# Sending Certified Mail from your Location

This box contains a user-defined list of letters you can print and mail from your location with Certified Mail. All letters will be sent in #10-size window envelopes. You choose whether the letters are sent with or without Return Receipt (Electronic).

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| Lien Notice                       | First Class w/COM | First Class        |
| Insurance Cancellation Notice     | Certified         | First Class        |
| Default Notice                    | Certified w/RR    | First Class        |
| Second Lock Removal Notice        | First Class       | First Class        |
| Inventory List for Public Auction | Certified         | Not used           |

COM = Certificate of Mailing (available for First Class Mail)  
RR = Return Receipt (available for Certified Mail)

Preview Certified Mail Label

Refresh OK Cancel

1. Click "Edit" and the "Edit" box appears, then choose "Yes" or "No" for Return Receipt. (Choose yes if you want the recipient signature.)
2. Click OK. An "X" should appear if a Return Receipt is required for the item. See the screen above for examples.

Please ensure you determine the legal notification requirements within the state(s) of operation regarding each of these letters. Failure to comply with the requirements could expose your business to legal action by the tenant.

## Printing Certified Mail Labels

To create Certified Mail from your location, follow these instructions.

1. Click the Operations tab.
2. Click “Letter” and “Task” in Collections.
3. Select the type of letter to print.

| Task                                   | Day | Fee   | Letter |
|--|-----|-------|--------|
| Overlock                               | 5   |       |        |
| Reverse: Overlock                      |     |       |        |
| Past Due Notice                        | 9   |       | X      |
| Reverse: Past Due Notice               |     |       |        |
| Cut the Lock                           | 20  | 10.00 |        |
| Reverse: Cut the Lock                  |     |       |        |
| Insurance Cancellation Notice          | 20  |       | X      |
| Reverse: Insurance Cancellation Notice |     |       |        |
| Lien Letter                            | 31  |       | X      |
| Reverse: Lien Letter                   |     |       |        |

| Name (17)  | Compa.     | Unit  | Rent Due | Total Due | Days Late | E-Mail      |
|--|------------|-------|----------|-----------|-----------|-------------|
| <input type="checkbox"/> Jordan, Mich...             |            | 263   | 725.00   | 975.00    | 299       |             |
| <input type="checkbox"/> Zeta-Jones, ...             |            | 102   | 475.00   | 725.00    | 299       |             |
| <input type="checkbox"/> Chan, Jackie                |            | RV012 | 1,150.00 | 1,415.00  | 299       |             |
| <input type="checkbox"/> Hecker, Mar...              |            | 216   | 740.10   | 1,048.40  | 299       |             |
| <input type="checkbox"/> Pitt, Brad                  |            | 222   | 725.00   | 975.00    | 299       | demo@...    |
| <input type="checkbox"/> Jackson, Sa...              | LA Film... | 220   | 725.00   | 975.00    | 299       |             |
| <input type="checkbox"/> Jackson, Sa...              | LA Film... | 211   | 725.00   | 975.00    | 299       |             |
| <input type="checkbox"/> Gooding, Cu...              |            | 215   | 725.00   | 975.00    | 299       |             |
| <input checked="" type="checkbox"/> Spielberg, St... |            | RV001 | 1,225.00 | 1,475.00  | 299       |             |
| <input type="checkbox"/> Chan, Jackie                |            | 105   | 450.00   | 675.00    | 271       |             |
| <input type="checkbox"/> Kidman, Nico...             |            | RV202 | 1,225.00 | 1,475.00  | 299       |             |
| <input type="checkbox"/> Berry, Halle                | Wigits ... | RV004 | 1,225.00 | 1,475.00  | 299       |             |
| <input type="checkbox"/> Berry, Halle                | Wigits ... | 201   | 825.00   | 1,100.00  | 330       |             |
| <input type="checkbox"/> Douglas, Mic...             |            | 202   | 825.00   | 1,100.00  | 330       |             |
| <input type="checkbox"/> Cowell, LC                  |            | 203   | 825.00   | 1,100.00  | 330       | icowell@... |
| <input type="checkbox"/> Hecker, Mar...              |            | 204   | 825.00   | 1,100.00  | 330       |             |
| <input type="checkbox"/> Hanks, Tom                  |            | 207   | 825.00   | 1,100.00  | 318       |             |

4. Select the tenants to whom the letters will be sent.
5. If you plan to add the Certified Mail item number to the body of the letter you are mailing print the Certified Mail labels first. You will then have the Certified Mail item number to insert in the letter.
6. Once the letter type and tenants have been selected, click the green “Certified Mail” link on the right side of the screen.
7. A notice will remind you that proceeding will print labels, and will charge your account. Click “Yes”.
8. Select the appropriate address. If letters are being sent to both Primary and Alternate addresses, you must process each group separately.
9. Each Certified Mail label will print on standard 8½”x 11” paper.
10. Match the label to the corresponding letter, fold against the fold line on the label and insert into the Certified Mail envelope (supplied by ADS) with the label showing through the window.

## SiteLink Mailing Tips

This section provides tips for printing Certified Mail labels at your office, as well as using Client Mail Services to outsource many first class and Certified Mail items.

### Review Security Levels

By default, all employees are given permission to use SiteLink Mail Services to mail letters. You can modify the security levels in SetupChecklist/Security Levels screen.

### Review and Update Company and Tenant Addresses

All Mailing Services require that the addresses you are mailing to meet USPS mailing requirements. The *return* and *recipient* addresses must include Name, Street address (physical or PO Box), City, State and Zip Code (5 or 9 digit).

SiteLink uses the address information in the *Company Information* screen for the sender's address and the address in the *Tenants* screen for the recipient address.

To ensure accurate mailing, go to *Company/SetupChecklist/TenantDefaults*, click the "Primary" tab and check the "required" checkbox for name, address, city, state and postal code. These settings will ensure that each new tenant added to SiteLink will have the address information required for accurate mailing. Do the same for "Alternate" addresses if you plan to send letters to them. Then review the existing addresses for all tenants and add any missing address information.

### Modify Past Due Tasks

First, review the Past Due Schedule screen and assign letters to the desired Past Due Events. Then, review the Mail Service screen and set the Return Receipt value for each letter that will be send via Certified Mail. No setup is required for First Class mail.

### Modify Letters

Several default letters contain blank lines used to manually add information after the letter is printed on site. Since Mail Export is an automated function, blank lines will no longer be useful on the letters. Dates can be managed using the Date.Insert keywords. You will be prompted to select a date for each of these values at the start of processing.

### Guidelines for Dates

1. Letter date – use the <Date.Insert> keyword.
2. Payment due date – use the <Date.InsertPayment> keyword.
3. Auction date – use the <Date.InsertAuction> keyword.
4. Unit Contents – use the <Tenant.UnitContents> keyword to return a list of storage unit contents entered in the Contents tab on the Payment screen.

Finally, you should remove any signature lines, Certified Mail numbers, etc

## Using Mail Services to Outsource your Mail

You can prepare documents that will be sent through Client Mail Services from several screens within SiteLink:

| Screen            | Service Available   |
|-------------------|---|
| Tasks and Letters | Certified Mail, First Class,<br>First Class with Certificate of Mailing |
| Invoices          | First Class Mail  |
| Reprint Forms     | First Class, First Class with<br>Certificate of Mailing                 |

## The Date of Printing and Mailing

The date of printing and mailing is determined by the “Select a Date” feature within SiteLink. You should allow two business days (exclude Saturday and Holidays) from the date the items are sent to ensure they are mailed on the correct date. **This is especially important when sending Pre-Lien, Lien letters or other time sensitive material.** If the items are not received within the period specified, the date will be adjusted to the actual date printed and mailed.

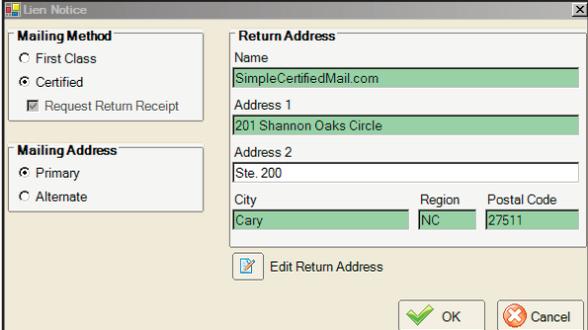
Below are several examples:

| Item             | Mailing Date      | Send File         |
|------------------|-------------------|-------------------|
| Invoices         | December 1, 2009  | November 27, 2009 |
| Past Due Letters | January 6, 2010   | January 4, 2010   |
| Lien Letters     | February 15, 2010 | February 11, 2010 |

## Using Mail Services – Step by Step

Outsourcing items through the Mail Services gives you another option besides printing and mailing at your location or emailing letters. You can use the feature selectively, or for all your documents. For example, you can print Monthly Past Due and Lien letters through Mailings Services, while printing other items at your office.

1. Click the **Operations** tab
2. Click “Tasks & Letters” in **Collections**
3. Select the appropriate letter in **Select a Task**
4. Select the “tenants”
5. Select “Mail Service” in **Task**
6. Click “Process”
7. A confirmation screen will pop-up with the type of letter being mailed in the top left corner of the pop-up. In this example, it’s “Lien Notice”.
  - In the *Mailing Method* section, select First Class or Certified. If you selected Certified with Return Receipt (Electronic) in the initial set-up, it will be checked.
  - Select either the Primary or Alternate Mailing Address. If letters are to be sent to both addresses each group must be processed separately.
  - Enter a new Return Address if needed. Then click “OK”.



The screenshot shows a dialog box titled "Lien Notice" with the following fields and options:

- Mailing Method:** Radio buttons for "First Class" and "Certified" (selected). A checked checkbox for "Request Return Receipt".
- Mailing Address:** Radio buttons for "Primary" (selected) and "Alternate".
- Return Address:** Fields for Name ("SimpleCertifiedMail.com"), Address 1 ("201 Shannon Oaks Circle"), Address 2 ("Ste. 200"), City ("Cary"), Region ("NC"), and Postal Code ("27511").
- An "Edit Return Address" button with a pencil icon.
- "OK" and "Cancel" buttons at the bottom right.

8. A Verification screen will appear. Click “Yes” after verifying all information.



The screenshot shows a dialog box titled "Mail Service" with a question mark icon and the following text:

You are mailing:  
Letter: Lien Notice  
Method: First Class / Primary address

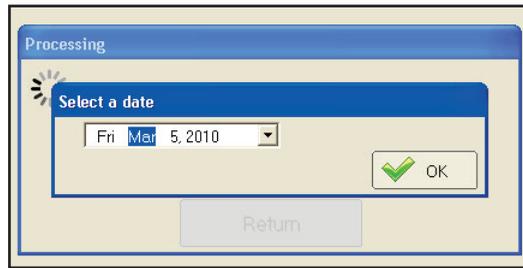
You will be charged postage and fees for this mailing.

Would you like to proceed?

Buttons for "Yes" and "No" are at the bottom.

9. Next you will see the “Select a date” screen. If you’ve modified your letter as recommended under the earlier Tips section, the date selected will be the same date printed on the letter.

Please review the Date of Printing and Mailing on page 7 to ensure your letters contain the correct date.



10. Click OK and the process of sending the information will start.
11. A message will confirm the number of items successfully sent and those not sent.

## Mail Export Errors Report

Any errors detected during the process will be noted in a printable report.

1. Print the report
2. Correct the errors
3. Resend the letters following the same process

THE REPORT IS ONLY AVAILABLE ONCE AT THE END OF THE MAIL PROCESS. IF THE MESSAGE INDICATES ITEMS FAILED, PLEASE PRINT THE ERROR REPORT.



## View and Print

A copy of each item that has been printed and mailed using Mail Service will be maintained for 90 days in the Mailing Services tab of your SimpleCertifiedMail.com account.

1. Login to your SimpleCertifiedMail.com account, using your User Name, Password and Client Code.
2. Click "Authenticate".

3. Click the “Mailing Services” option under the Reports Tab.
4. Select the appropriate search box. If the name box is selected you may enter the name (must be an exact match i.e. John M. Smith) or enter a name wildcard search of \*Smith. A wildcard search of \* will provide all items for a specified date range.
5. Scroll down to find the tenants name and the item that was printed and mailed. The mailed items are listed in the “Type” column as **Invoice, Past Due, Pre-Lien** or **Lien**.
6. Click on “View Item” at the far right of the screen. A PDF image will appear.
7. The item can be printed by clicking the print icon from the PDF view window.

## Frequently Asked Questions

**Question :** I received a web service error when I begin processing the Certified Mail labels.

**Answer:** The error could be caused by several circumstances. Most often the first tenant address did not pass the Address Validation test.

1. Login to your account at SimpleCertifiedMail.com.
2. Choose the **Create Label** tab.
3. Select the link called <http://zip4.usps.com/zip4/welcome.jsp> that is found in the Tips on the right side of the screen.
4. Check the address. If the proper address cannot be found, the tenant should be removed from the list and the process restarted.

**Question:** I received a web service error when I begin processing items using Mailing Services.

**Answer:** Review the Mail Export Error Report noted on the previous page.

**Question:** What do I do with a label that prints incorrectly or is otherwise not mailed?

**Answer:** Any label that is printed and not mailed can be processed as a refund.

1. Login to your account at SimpleCertifiedMail.com.
2. Select the “View Delivery Information” option in the **Reports** tab.
3. Scroll down to the tenant’s name.
4. Move to the far right of the line.
5. Select “Refund Request” and the item will turn Red.

**Question:** How do I receive proof that an item sent with a Certificate of Mailing was actually accepted by the USPS?

**Answer:** A copy of the acceptance is not automatically posted to your account. If required for an individual item, a copy of the firmbook for the date of mailing may be requested by email at [assistance@simplecertifiedmail.com](mailto:assistance@simplecertifiedmail.com).