To try and memorialize the process here is process list for new client or new template.  Please let me know if missed anything.

**If new client needs to be added to an existing template already setup**

1. Email to Jeff and Lisa to verify any client rules required.  Lisa will check with Felicia potentially for clarification if needed
2. Jeff and Lisa to email Rajneesh, Sameer and Anish if special client template is required
3. Christine will add phone number to client window 349,01
4. Once completed Lisa will verify any changes to the letter control list
5. Once completed Jeff with add to SNDGRD logic block to allow letters
6. Once finished Operations will be notified that the letters for that client are good to be sent **(subject to any warm up volume restrictions)**

**New letter Template**

1. Operations to email Jeff, Felicia and Lisa to verify requirements and if possible to do on Sendgrid
2. If no issues Felicia will create the template
3. Jeff or Joe will approve the template for use
4. Email will be sent to Sameer, Rajneesh and Anish for setup
5. Test email will be conducted for sign off on a test account
6. Once testing approved follow client procedure above to turn client on for new template.
7. Notify operations template ready

**Current Letter Limitations**

1. No validation letters
2. No Past statute
3. No 910/912 Post Date Notification
4. No Spanish Language
5. No Debt Buyers
6. No AFS clients

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