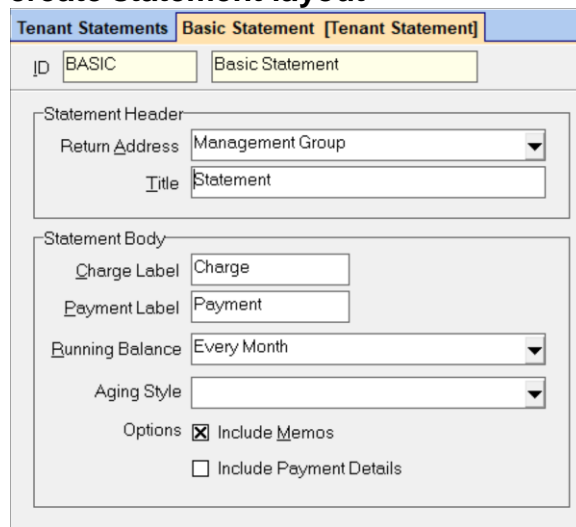## Overview

How to create tenant statements.

There are two steps involved in creating tenant statements.
1. The first is to create the tenant statement profile under <<Setup, Tenant Statements>>. This creates the layout of the statement. That statement style can be assigned to the tenant in the Tenant Profile, or you can select it when you go to <<Mailings, Tenant Statements>> to run the statements.
2. The second step is to go to <<Mailings, Tenant Statements>> to generate the actual statement.

SETUP, Tenant Statement – create statement layout

A list of unpaid charges will print as an addendum to the tenant statement.

ID - The ID must be unique for each statement type.

Statement Header

Return Address - Select the return address style you wish from the Find List.

Title - Enter a title for the statement which will print at the top of the statement.

Statement Body

Charge Label
Select the label you want on the column which shows transactions which increase the amount the tenant owes. Common labels are Charge, Bill.

Payment Label
Select the label you want on the column which shows transactions which decrease the amount the tenant owes. Common labels are Payment, Receipt.

Include Memos
Put a check in this check box if you want the memos on the transactions to print on the statement.

Running Balance
Select from the Find List the type of running balance you wish printed on the statement.
>   **Blank** - a beginning and ending balance will print for the time period chosen.
>   **Every Day** - the balance will print on each day for which there is a transaction
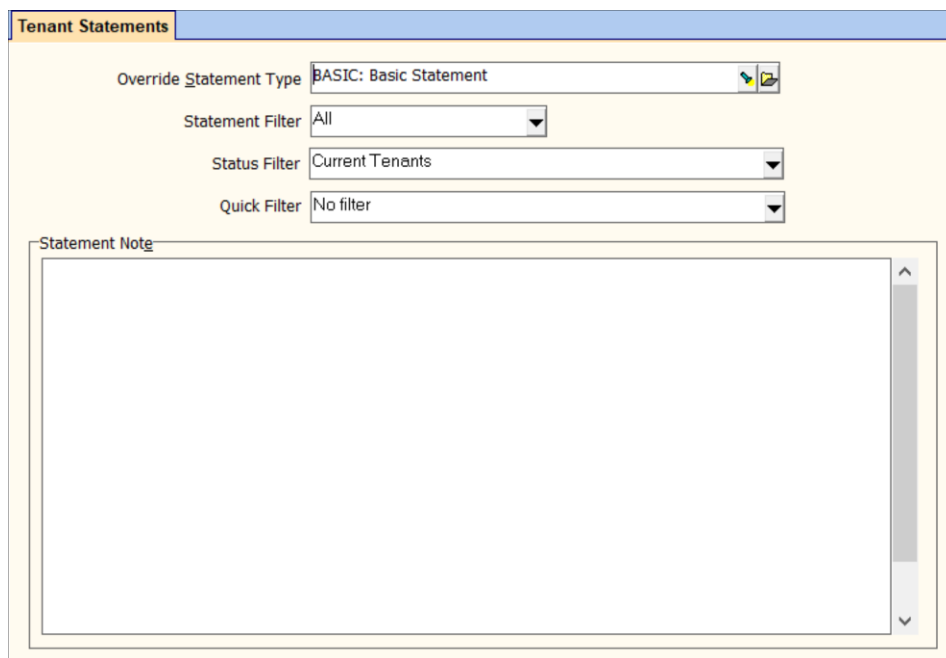>   **Every Month** - the balance will print on the same line as the last transaction in each month

Any unapplied open credits will show on a line beneath the ending balance.

Aging Style
- You can choose to include unpaid charges (select default or unpaid charges) or not show them (select None).
- If you choose to show unpaid charges, the statement will list them under heading of 30 day, 60 days, etc. There are columns for Due Date, Assessed, Paid, Due.

MAILINGS, Tenant Statements – generate statements

Override Statement Type
This field will let you override the statement type entered in the tenant profile and use the statement type selected here instead. Tenants with no statement type in the profile will not get a statement unless this field is filled in.

Statement Filter

The filter can be set to:
- **All** - to include all tenants
- **Any Statements** - to include only those tenants who have a statement style selected in their profile.
- **Internet Statements** - to include only those marked for Internet statements in their profile.
- **Paper Statements** - to include only those marked for paper statements in their profile

Status Filter - to select tenant status for which to run the statements: All, Active (current and future), Current, Future, Past.

Quick Filter
- **No Filter** - includes all per above
- **Has unpaid charges** - tenants with statuses selected above and with unpaid charges

Statement Note

There is room for a multiple line note to go at the beginning of each statement printed.

REPORT SETUP

Report Dates
Enter the starting and ending dates for the statement. The default is the first day of this month for the starting date to today's date.

Selection Box
The default is This Month to Date. Click the down arrow in this box to choose other date options or enter your date range.

Restrict To
Select from the Find List the tenant or profile group you wish to want to send statements to.

Limit to Category
You can limit the statements to a specific category if you wish. Select the category from the Find List. The category can be included or excluded.

OPTIONS

This lets you override the style and select large fonts.

Statements can be previewed and then printed or published to PROMAS Central or emailed to the tenant depending on how the tenant profile and Internet Publishing is configured.

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