

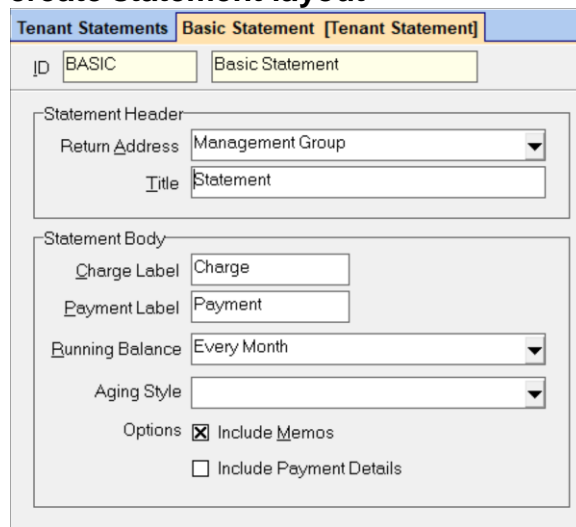
Overview

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

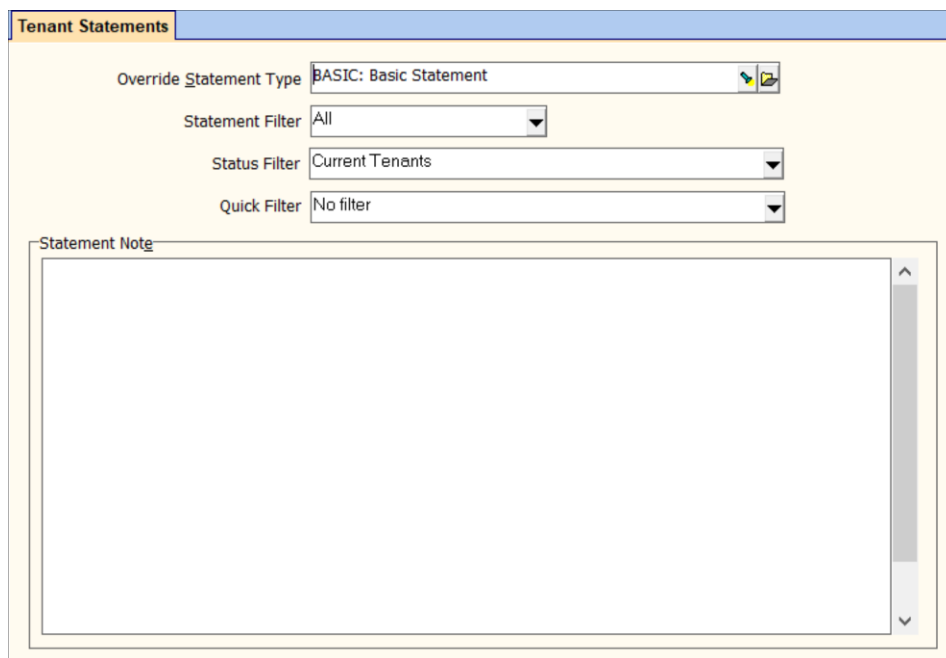
Every Month - the balance will print on the same line as the last transaction in each month

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



The screenshot shows a software interface titled "Tenant Statements". It contains several dropdown menus for configuration: "Override Statement Type" is set to "BASIC: Basic Statement"; "Statement Filter" is set to "All"; "Status Filter" is set to "Current Tenants"; and "Quick Filter" is set to "No filter". Below these filters is a large, empty text area labeled "Statement Note".

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 Setup

Printer: HPB8B1DC (HP OfficeJet 250 Mobile Series) Properties

Paper Source: Main Tray Make Default

Report Date: 11/1/2018 to 11/30/2018 Last Month

Restrict to: [Search] [Dropdown]

Limit To Category: [Search] Exclude Category

Settings Options Print Publish Mail Export Preview Cancel

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.

Options

Report

Orientation: Portrait

Paper Size: Letter

Layout: Full Page

Margins: Automatic

Text Size: Normal Print

Message Size: Normal

Restore All Defaults Save as Defaults Save Cancel

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.

Statement
Edward & Marianne Guro for 212 Main Street
June 1, 2018 to June 4, 2018

Date	Description	Charge	Payment	Balance
6/1/2018	Beginning Balance			\$0.00
6/1/2018	Rent	\$950.00		\$950.00
6/4/2018	Adjustment - tenant fixed leaking faucet		\$75.00	
6/4/2018	Payment Received		\$875.00	\$0.00
	Net Balance Change	\$0.00	\$950.00	\$950.00
6/4/2018	Ending Balance			\$0.00