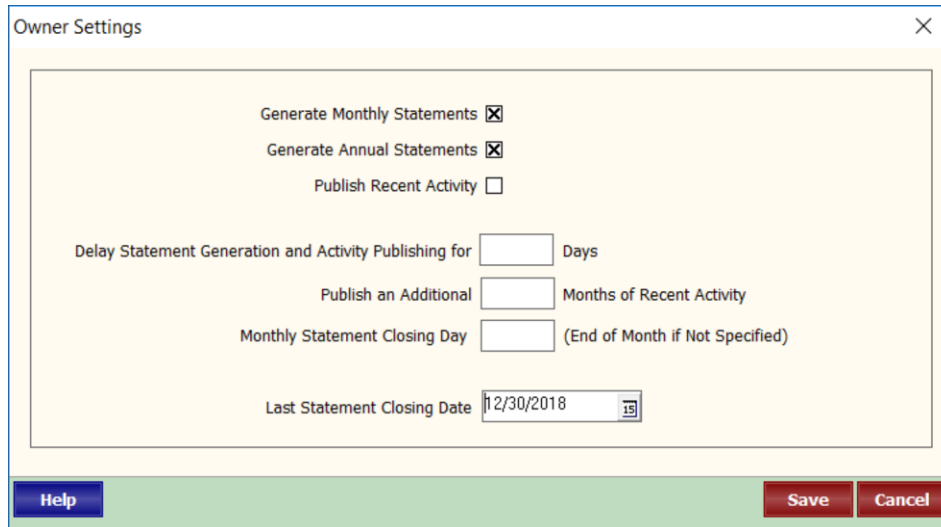


Overview

The annual statement will publish at the same time as the January monthly statement provided:
In the Internet Publishing function, Advanced tab:



Owner Settings

Generate Monthly Statements ☒

Generate Annual Statements ☒

Publish Recent Activity ☐

Delay Statement Generation and Activity Publishing for Days

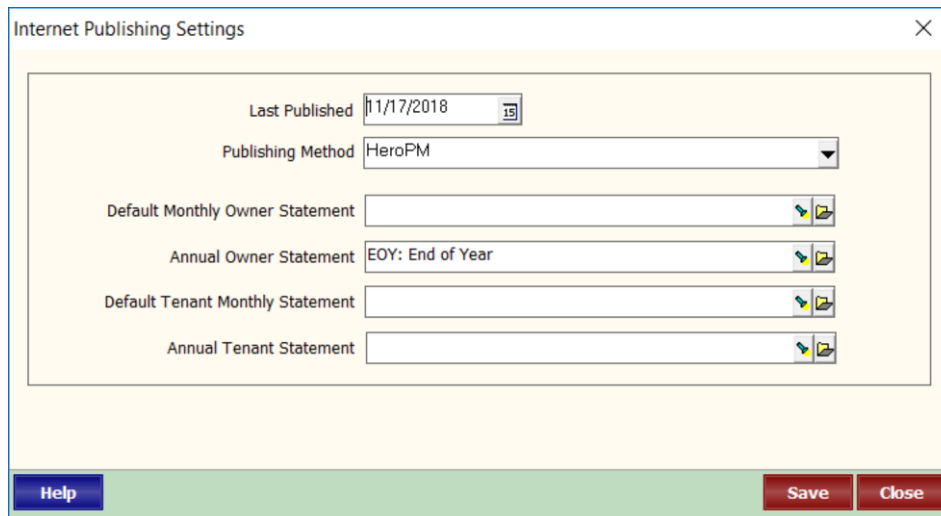
Publish an Additional Months of Recent Activity

Monthly Statement Closing Day (End of Month if Not Specified)

Last Statement Closing Date 12/30/2018 19

Help Save Cancel

- In Owner Settings, the Generate Annual Statement checkbox is marked.
- In Owner Settings, the Last Published Date is December 30 (not Dec. 31) or earlier.
-



Internet Publishing Settings

Last Published 11/17/2018 19

Publishing Method HeroPM

Default Monthly Owner Statement 

Annual Owner Statement EOY: End of Year 

Default Tenant Monthly Statement 

Annual Tenant Statement 

Help Save Close

- In Publishing Setup, a statement style is selected in the Annual Owner Statement field.

To publish the annual statement before or after the January monthly statement, do the following:

1. Go to <<Internet Publishing, Advanced tab>>, <Publishing Setup>.
2. Select the Annual Owner Statement. <Save>.
3. Go to <<Internet Publishing, Advanced tab>>, <Owner Settings>.
4. Unmark the Generate Monthly Statements checkbox.
5. Mark the Generate Annual Statements checkbox.
6. Make note of the Monthly Statement Closing Date. If Dec. 31 or later, change to Dec. 30 of the year for which you are doing taxes.
7. Save - the Generate Owner Statements checkbox will be highlighted.
8. Go to the Basic tab and click <Publish>.
9. When finished, go to <<Internet Publishing, Advanced tab>>, <Owner Settings>.
10. Mark the Generate Monthly Statements checkbox.
11. Unmark the Generate Annual Statement checkbox.
12. Set the Monthly Statement Closing Date to what it was prior to publishing.
13. <Save>.

Regenerate an Annual Statement (after making corrections)

1. Go to <<Internet Publishing, Advanced tab>>, <Owner Settings>.
2. Unmark the Generate Monthly Statements checkbox.
3. Mark the Generate Annual Statements checkbox.
4. If the Last Statement Date is December 31 or later make note of it and change the date to December 30 of last year.
5. Save.
6. Click Regenerate Owner Statements.
7. Restrict to the Ledger.
8. Click Compile – the statement will be added to the Upload folder.
9. Be sure the Upload Documents is highlighted. On the Basic tab click <Publish>. The regenerated statement will replace the original.
10. When finished uploading, go to <<Internet Publishing, Advanced tab>>, <Owner Settings>.
11. Mark the Generate Monthly Statements checkbox.
12. Set the Monthly Statement Closing Date to what it was.
13. Leave the Generate Annual Statement checkbox marked so they will be generated automatically next year.
14. Save.