



Email Owner Statements

Property Management Solutions for Over 30 Years

Overview

These instructions are for those who do not want to use PROMAS Central but do want to email their owner statements.

There are two ways to email the statements.

Method 1

You can set up the program to create the statements on a monthly basis the same way they are for uploading to PROMAS Central. That is, always on the same day of the month for a month. Then you use the Internet Publishing function to create and email the statements.

Method 2

You want to create the statements on different days each month for different time periods. Then you use Mailings, Owner Statements to generate the statements and Internet Publishing to email the statements.

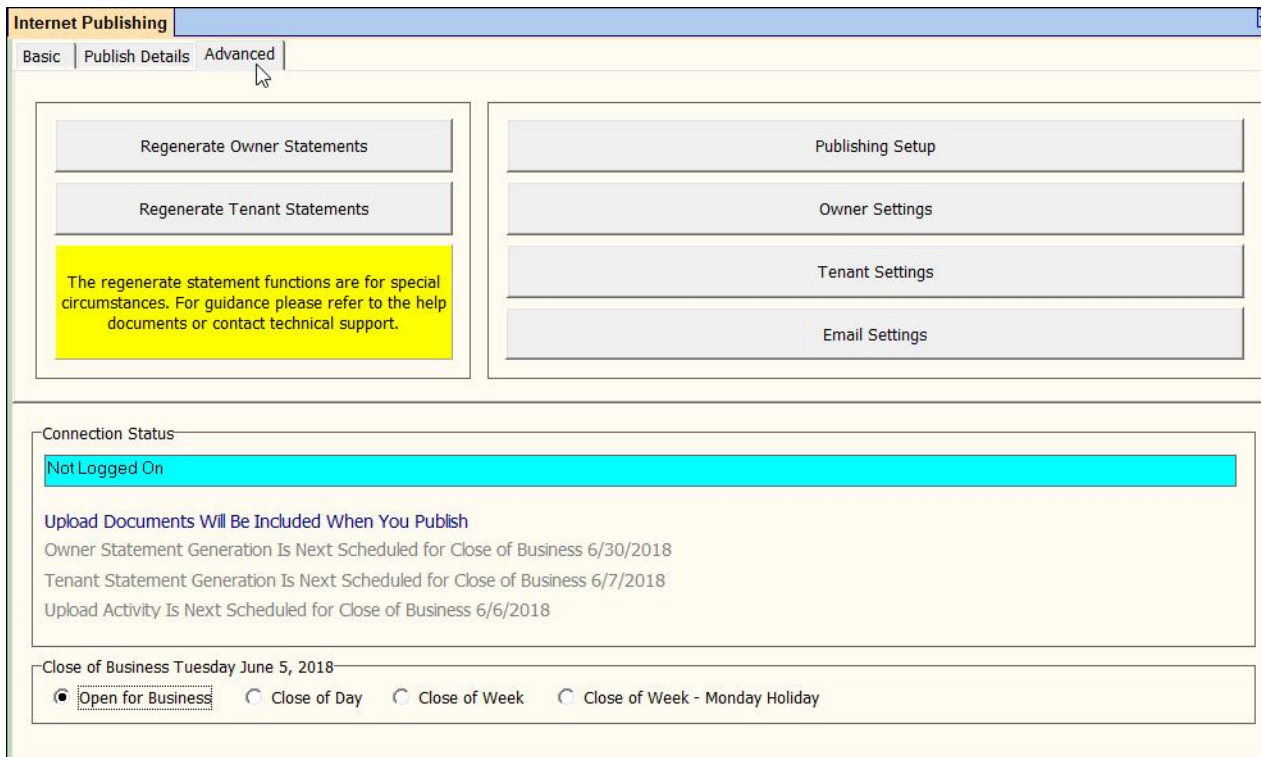
Method 1

Setup – One Time

1. Go to <<Internet Publishing>>.



2. Click on the Advanced Tab.



3. Click on <Owner Settings>.
4. Mark the Checkbox for Generate Monthly Statements.
5. Mark the Checkbox for Generate Annual Statements.
6. Enter the Monthly Statement Closing Day (e.g. 15 to publish every month from 16th of last month to 15th of this month). If you want to publish at the end of the month leave it blank.
7. Enter a Last Statement Closing Date (e.g. the 16th of last month).
8. <Save>.

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

Help Save Cancel

9. Click on <Publishing Setup>.
10. Change Publishing Method to Email Only.
11. <Save>.

Internet Publishing Settings

Last Published

Publishing Method

Default Monthly Owner Statement

Annual Owner Statement

Default Tenant Monthly Statement

Annual Tenant Statement

Help Save Close

12. Click on <Email Settings>.
13. Enter the appropriate settings from your email program.
14. Enter a Reply To email address.
15. Enter a Subject (e.g. Monthly Statement attached.)
16. Enter a message in Body. This will be part of each email you send to each owner.
17. You can click the <Test Email> button to be sure it is working.
18. Save.

Publishing Manager 6 2018.1 Build 1

Email Settings

Server Quota Document

Outgoing Email Server Settings

SMTP Server (e.g. smtp.myisp.com)

Port Number

Email Account

SMTP Username

Enable SSL/TLS

SMTP Authorization

Server Quota Document

Email Document Settings

Additional Recipients

CC to additional recipients

Reply To

Reply to email

Subject

External HTML email body

Body

Each Time

1. Each month on the appropriate day go into <<Internet Publishing>>.
2. Click <Publish>.

The screenshot shows the 'Publishing Manager' interface with three tabs: 'Basic', 'Publish Details', and 'Advanced'. The 'Basic' tab is active. On the left, there is a vertical stack of buttons: 'Publish', 'Email Documents', 'Backup and Publish to Promas Central', and 'Server Control Panel'. On the right, there is a vertical stack of buttons: 'Upload Manager', 'Owner Statement Message', 'Tenant Statement Message', and 'Logon'. Below these buttons, there is a 'Connection Status' section with a red bar indicating 'Not Logged On'. Below that, there are three red status messages: 'Upload Documents Will Be Included When You Publish', 'Owner Statement Generation Is Not Scheduled', and 'Tenant Statement Generation Is Not Scheduled'. At the bottom, there is a 'Close of Business Tuesday June 5, 2018' section with four radio button options: 'Open for Business' (selected), 'Close of Day', 'Close of Week', and 'Close of Week - Monday Holiday'.

3. Statements will be generated.
4. A screen will display showing the progress of the emailing to owners and when it is complete.
5. After they are successfully uploaded or emailed they will be deleted from the Upload folder.

The screenshot shows the 'Welcome to Publishing Manager' screen. At the top, it says 'Welcome to Publishing Manager' in blue. Below that, there is a dark blue bar with the word 'Email' in white. Underneath, it says 'Email service pauses every 5 emails sent. The next email will start in 27 seconds'. At the bottom, there is a blue square icon with a white envelope and a checkmark. To its right, it says 'Document Send By Email' in bold, followed by a green progress bar that is about 80% full. Below the progress bar, it says 'Paused' and '5/6'.

The screenshot shows the 'Welcome to Publishing Manager' screen. At the top, it says 'Welcome to Publishing Manager' in blue. Below that, there is a dark blue bar with the word 'Email' in white. Underneath, it says 'Processing Complete'. At the bottom, there is a blue square icon with a white envelope and a checkmark. To its right, it says 'Document Send By Email' in bold, followed by a green progress bar that is 100% full. Below the progress bar, it says 'Complete' and '6/6'.

Method 2

Setup – One Time

1. Go to <<Internet Publishing>>.
2. Click on the Advanced Tab.

The screenshot shows the 'Internet Publishing' interface with the 'Advanced' tab selected. On the right side, there is a vertical navigation menu with the following items: Profile Search, Dashboard, Internet Publishing (highlighted), Related Tasks, Profiles, AP, AR, GL, Maintenance, Reports, and Mailings. The main content area has three tabs: 'Basic', 'Publish Details', and 'Advanced'. Under the 'Advanced' tab, there are two columns of buttons. The left column contains 'Regenerate Owner Statements', 'Regenerate Tenant Statements', and a yellow box with text: 'The regenerate statement functions are for special circumstances. For guidance please refer to the help documents or contact technical support.' The right column contains 'Publishing Setup', 'Owner Settings', 'Tenant Settings', and 'Email Settings'. Below these buttons is a 'Connection Status' section showing 'Not Logged On'. Further down, there is a section titled 'Upload Documents Will Be Included When You Publish' with the following text: 'Owner Statement Generation Is Next Scheduled for Close of Business 6/30/2018', 'Tenant Statement Generation Is Next Scheduled for Close of Business 6/7/2018', and 'Upload Activity Is Next Scheduled for Close of Business 6/6/2018'. At the bottom, there is a 'Close of Business Tuesday June 5, 2018' section with radio buttons for 'Open for Business' (selected), 'Close of Day', 'Close of Week', and 'Close of Week - Monday Holiday'.

3. Click on <Publishing Setup>.
4. Change Publishing Method to Email Only.
5. <Save>.

The screenshot shows the 'Internet Publishing Settings' dialog box. It has a title bar with a close button (X). The main area contains the following fields: 'Last Published' with a date picker set to 5/16/2018; 'Publishing Method' with a dropdown menu set to 'Direct Email'; 'Default Monthly Owner Statement' with a text input field and a file selection icon; 'Annual Owner Statement' with a text input field and a file selection icon; 'Default Tenant Monthly Statement' with a text input field and a file selection icon; and 'Annual Tenant Statement' with a text input field and a file selection icon. At the bottom, there are three buttons: 'Help', 'Save', and 'Close'.

6. Click on <Email Settings>.
7. Enter the appropriate settings from your email program.
8. Enter a Reply To email address.
9. Enter a Subject (e.g. Monthly Statement attached.)
10. Enter a message in Body. This will be part of each email you send to each owner.
11. You can click the <Test Email> button to be sure it is working.
12. <Save>.

Publishing Manager 6 2018.1 Build 1

Email Settings

Server Quota Document

Outgoing Email Server Settings

SMTP Server (e.g. smtp.myisp.com)

Port Number

Email Account

SMTP Username

Enable SSL/TLS

SMTP Authorization

Server Quota Document

Email Document Settings

Additional Recipients

CC to additional recipients

Reply To

Reply to email

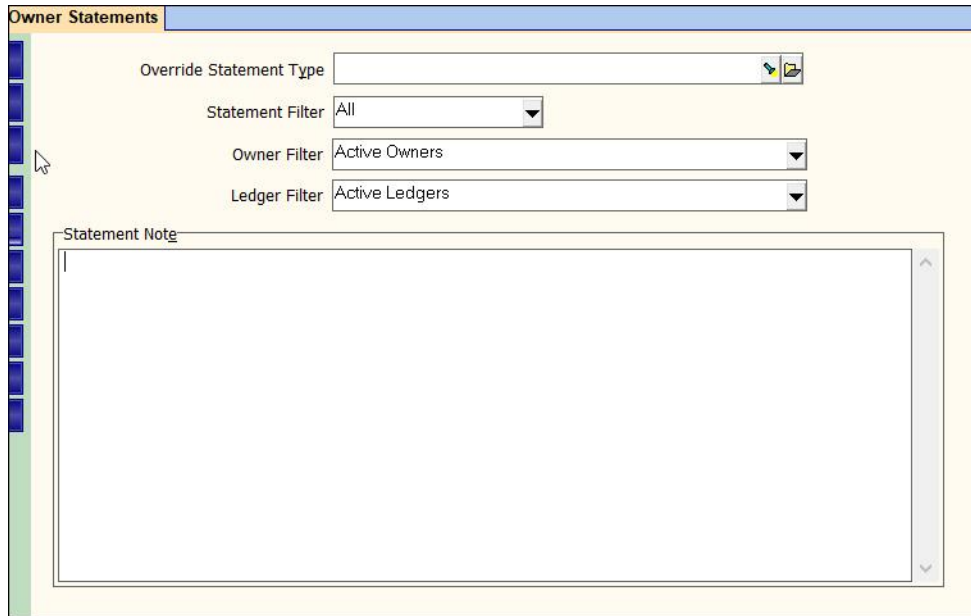
Subject

External HTML email body

Body

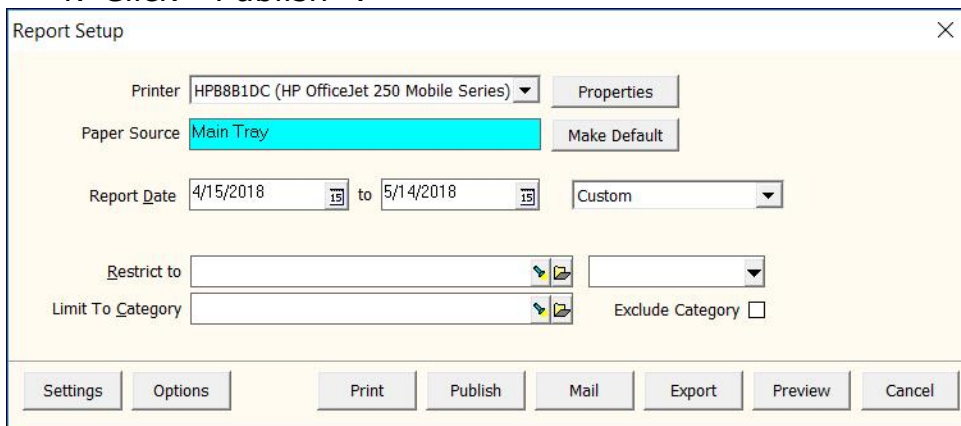
Each Time

1. Go to <<Mailings, Owner Statements>>.
2. Enter any parameters you want and click <Run>.



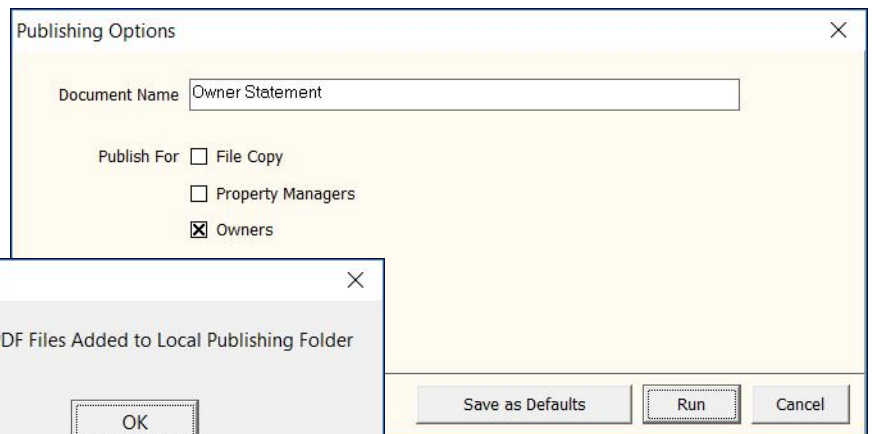
The screenshot shows the "Owner Statements" dialog box. It features several dropdown menus: "Override Statement Type" (empty), "Statement Filter" (set to "All"), "Owner Filter" (set to "Active Owners"), and "Ledger Filter" (set to "Active Ledgers"). Below these is a large text area labeled "Statement Note" which is currently empty. The dialog has a standard Windows-style title bar and a close button.

3. On the Report Setup screen enter any additional parameters and the date range.
4. Click <Publish>.

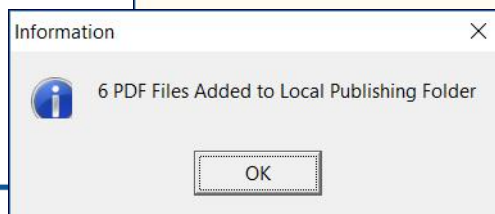


The screenshot shows the "Report Setup" dialog box. It includes fields for "Printer" (HPB881DC (HP OfficeJet 250 Mobile Series)), "Paper Source" (Main Tray), "Report Date" (4/15/2018 to 5/14/2018), and "Custom" (set to "Custom"). There are also fields for "Restrict to" and "Limit To Category", and an "Exclude Category" checkbox. At the bottom, there are buttons for "Settings", "Options", "Print", "Publish", "Mail", "Export", "Preview", and "Cancel".

5. Click <Run> on the next screen.
6. Click <OK> to the message that displays showing how many files have been added to the Publishing Folder - those are the statements ready to be emailed.



The screenshot shows the "Publishing Options" dialog box. It has a "Document Name" field containing "Owner Statement". Below are three checkboxes: "Publish For" with options "File Copy", "Property Managers", and "Owners" (which is checked). At the bottom, there are buttons for "Save as Defaults", "Run", and "Cancel".

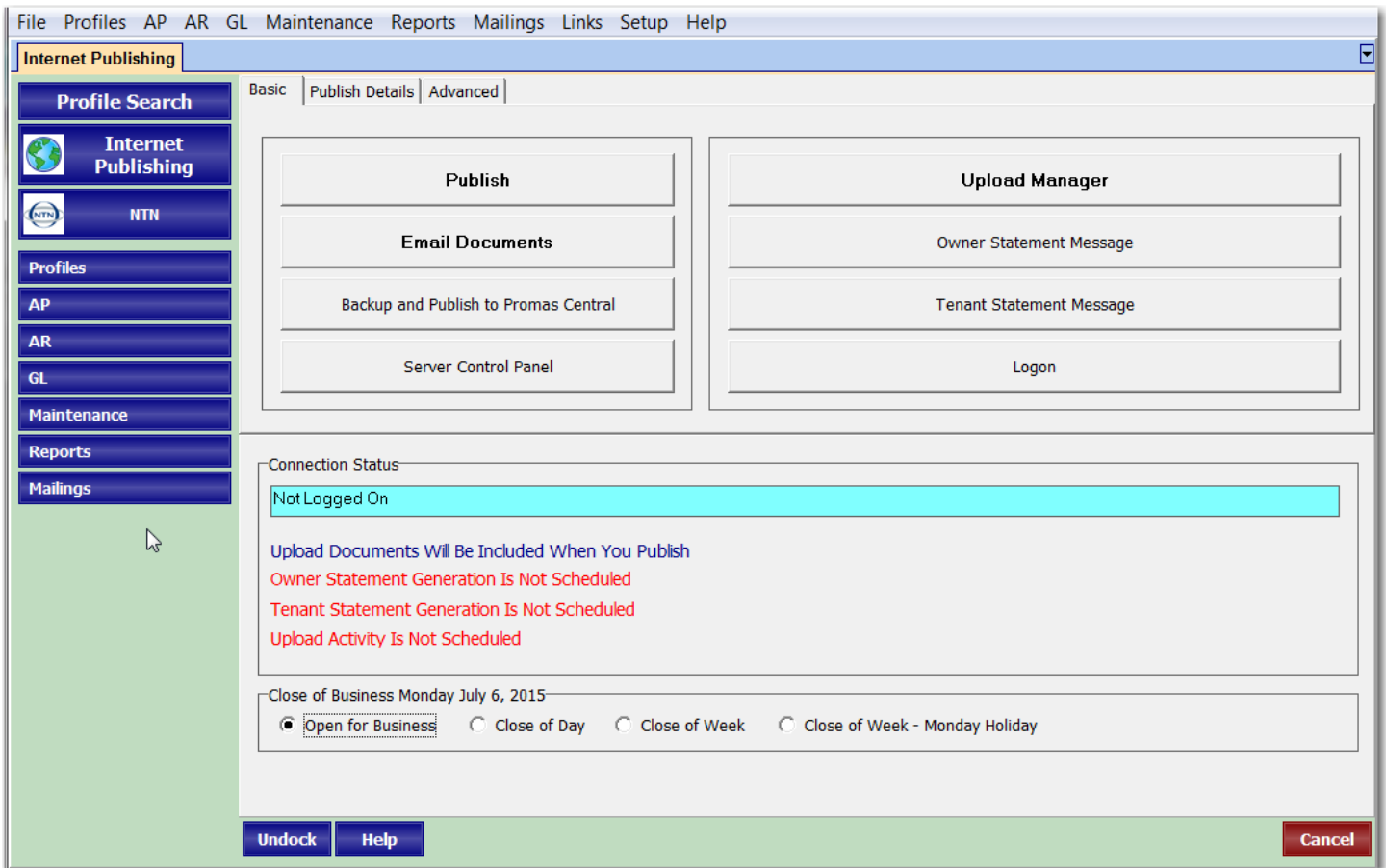


The screenshot shows an "Information" dialog box with a blue information icon. The text reads "6 PDF Files Added to Local Publishing Folder". There is an "OK" button at the bottom.

7. Go to <<**Internet Publishing**>>.



8. Click <**Email Documents**>.




9. A screen will display showing the progress of the emailing to owners and when it is complete.
10. After they are successfully uploaded or emailed they will be deleted from the Upload folder.

Welcome to Publishing Manager

Email

Email service pauses every 5 emails sent. The next email will start in 27 seconds




Document Send By Email
Paused 5/6

The screenshot shows a progress bar for 'Document Send By Email' that is currently 'Paused' at 5/6. A blue icon with a document and envelope symbol is on the left. The progress bar is green and shows 5 out of 6 items completed. Below the bar, the word 'Paused' is on the left and '5/6' is on the right.

Welcome to Publishing Manager

Email

Processing Complete



Document Send By Email
Complete 6/6

The screenshot shows the same progress bar for 'Document Send By Email' but now it is 'Complete' at 6/6. The progress bar is fully green. Below the bar, the word 'Complete' is on the left and '6/6' is on the right.