

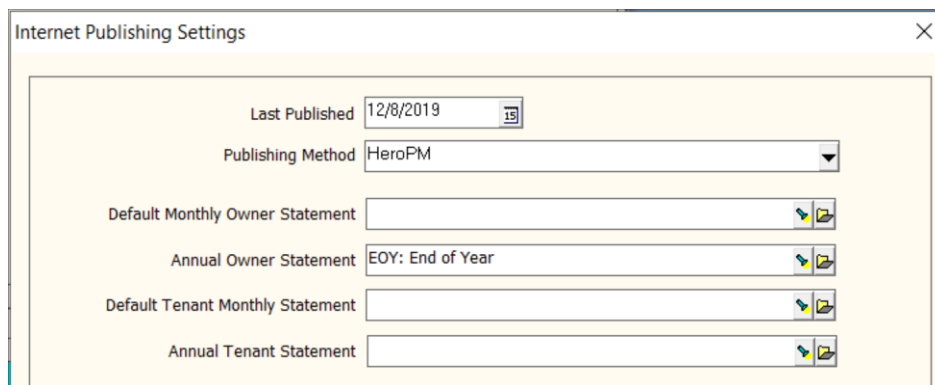
Overview

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

- 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.
- 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:

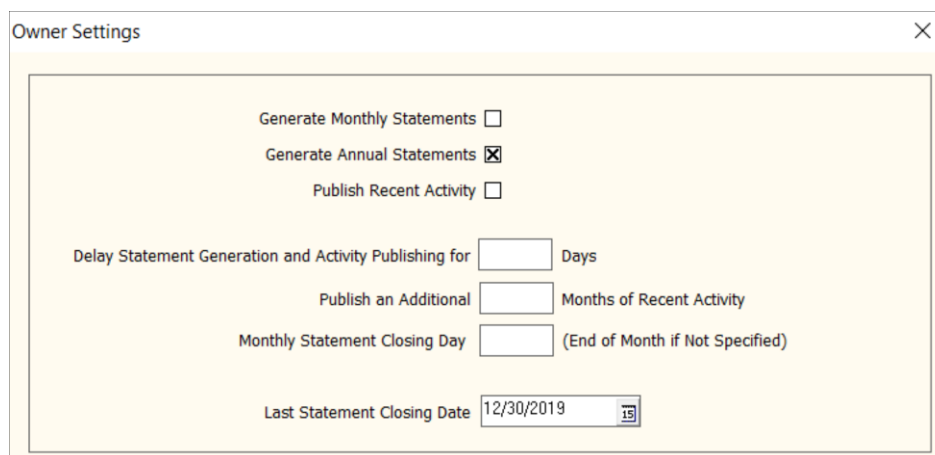
1. Go to <<Internet Publishing, Advanced tab>>, <Publishing Setup>.
2. Select the Annual Owner Statement. <Save>.



The screenshot shows the 'Internet Publishing Settings' dialog box. It contains the following fields:

- Last Published: 12/8/2019
- Publishing Method: HeroPM
- Default Monthly Owner Statement: [empty]
- Annual Owner Statement: EOY: End of Year
- Default Tenant Monthly Statement: [empty]
- Annual Tenant Statement: [empty]

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.



The screenshot shows the 'Owner Settings' dialog box. It contains the following fields:

- Generate Monthly Statements:
- Generate Annual Statements:
- Publish Recent Activity:
- Delay Statement Generation and Activity Publishing for: [empty] Days
- Publish an Additional: [empty] Months of Recent Activity
- Monthly Statement Closing Day: [empty] (End of Month if Not Specified)
- Last Statement Closing Date: 12/30/2019

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.