



# Create a Report Letter

Property Management Solutions for Over 30 Years

## Overview

A report letter is a report that has text added above or below the report and is created using the mail function on the report setup screen.

### Example- Modify Owner Unit Tenant List Report

1. To create the report letter and add to report list, go to Reports, Owner Reports.
2. Click <Manage Reports>.

3. Select the Owner Unit Tenant List Report and click copy.

Select One or More Reports

- Arizona Business License Application
- Ledger-Owner List
- Owner Balances
- Owner Cash Analysis
- Owner Cash Analysis (Suspect)
- Owner Contact List
- Owner Mail Label (3 Across)
- Owner Management Agreement Expirations
- Owner Profile
- Owner Statement
- Owner-Ledger List
- Owner-Unit List

Description of Highlighted Report

Report Name: Owner-Unit List

Column Fields:

1. Unit from Owner-Unit List
2. Percentage from Owner-Unit List
3. Rent Share from Owner-Unit List
4. Manager from Owner-Unit List

Filters: Table: "Owner"  
((Status = Active) OR (Status = No Posting))

Group Fields:

1. Owner from Owner-Unit List (ascending)

Sort Fields:

1. Unit from Owner-Unit List (ascending)

Run Selected Reports    Manage Reports    Run Highlighted Report    Modify    Filter    Options

Manage Owner Reports

Select Report to Manage

- Arizona Business License Application
- Ledger-Owner List
- Owner Balances
- Owner Cash Analysis
- Owner Cash Analysis (Suspect)
- Owner Contact List
- Owner Mail Label (3 Across)
- Owner Management Agreement Expirations
- Owner Profile
- Owner Statement
- Owner-Ledger List
- Owner-Unit List

Description of Highlighted Report

Report Name: Owner-Unit List

Column Fields:

1. Unit from Owner-Unit List
2. Percentage from Owner-Unit List
3. Rent Share from Owner-Unit List
4. Manager from Owner-Unit List

Filters: Table: "Owner"  
((Status = Active) OR (Status = No Posting))

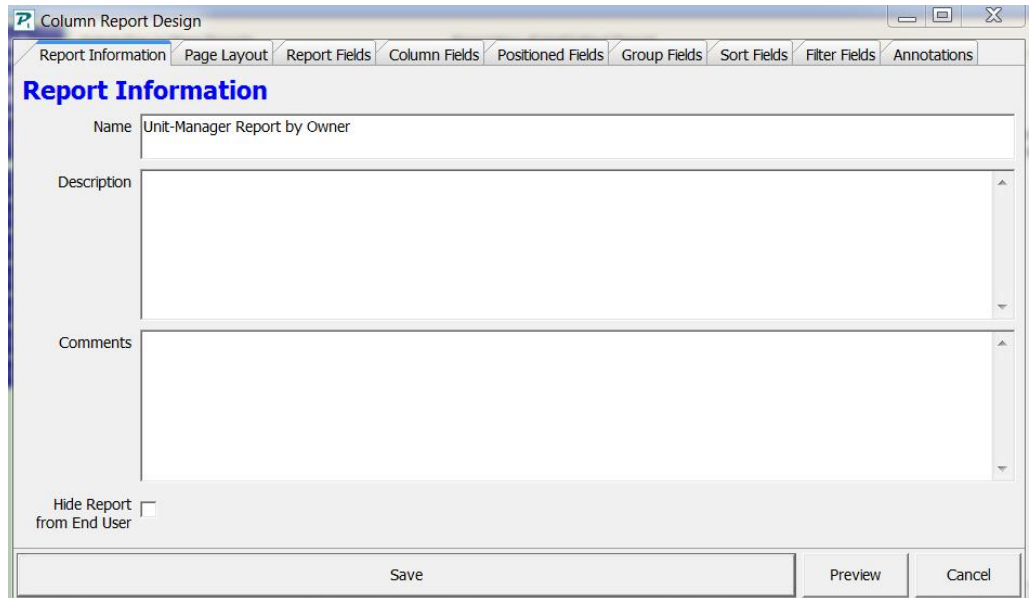
Group Fields:

1. Owner from Owner-Unit List (ascending)

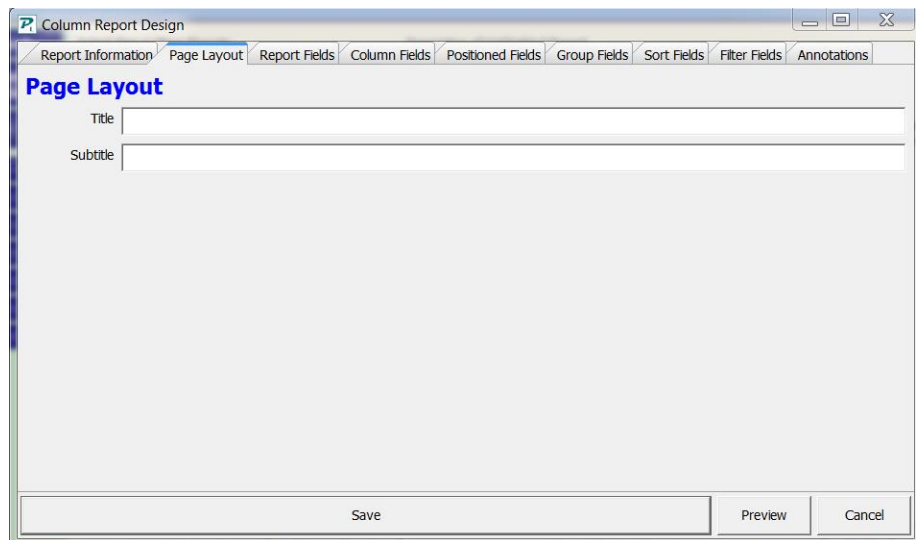
New    Copy    Modify    Delete

Help    Close

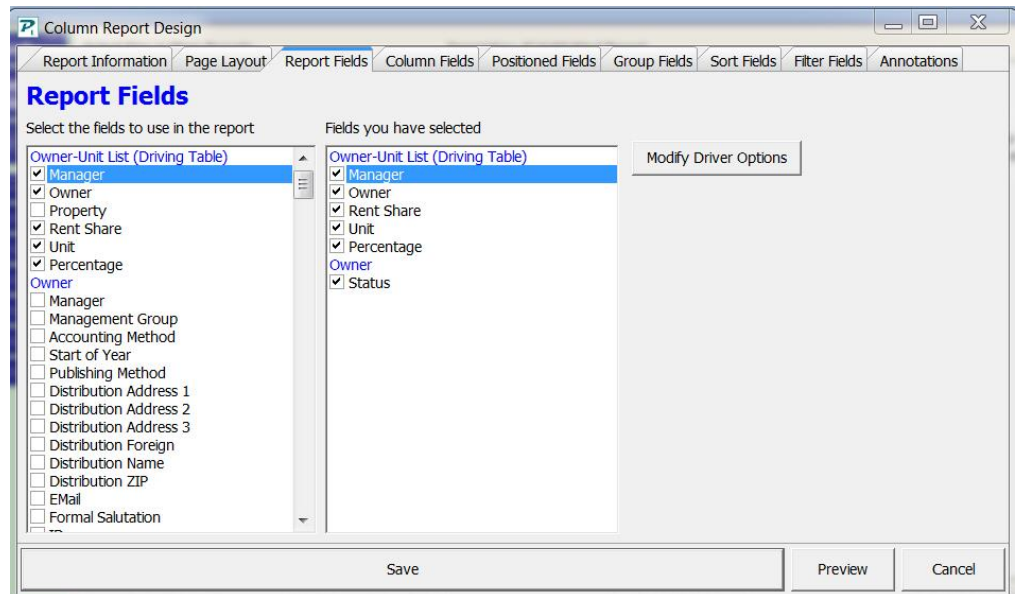
4. On the Report Information tab enter a name for the report.



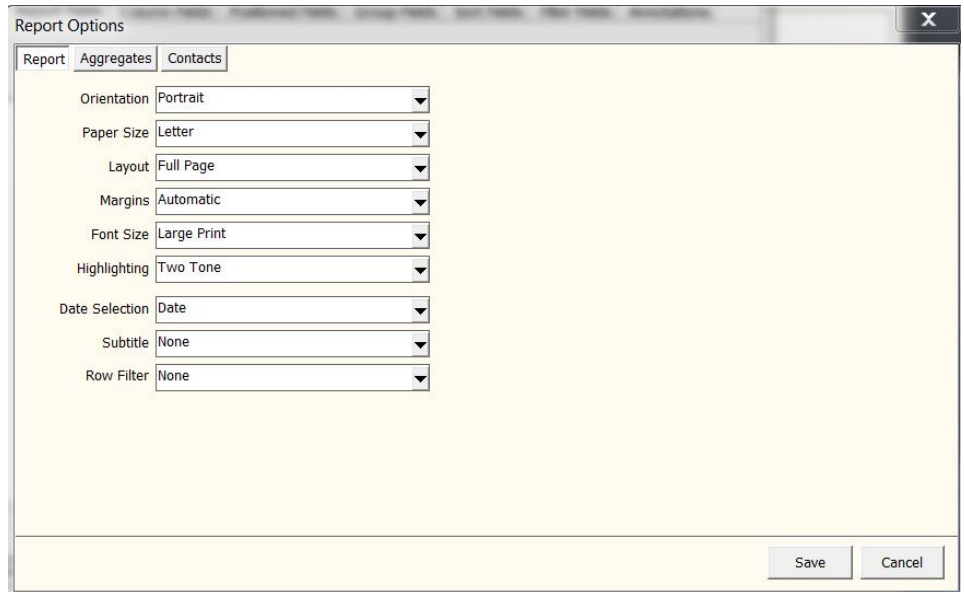
5. On the Page Layout tab clear the Title field



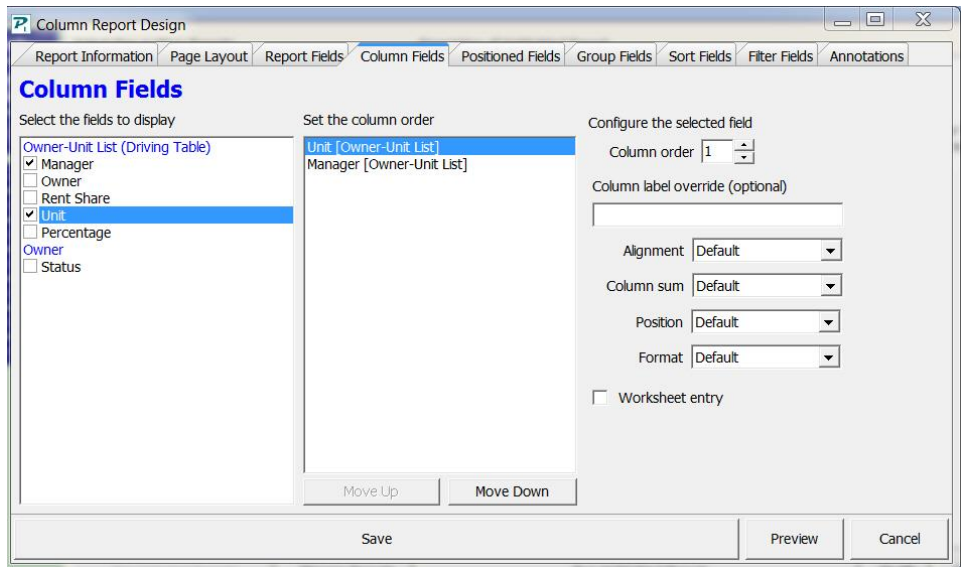
6. On the Report Fields tab click Modify Driver Options.



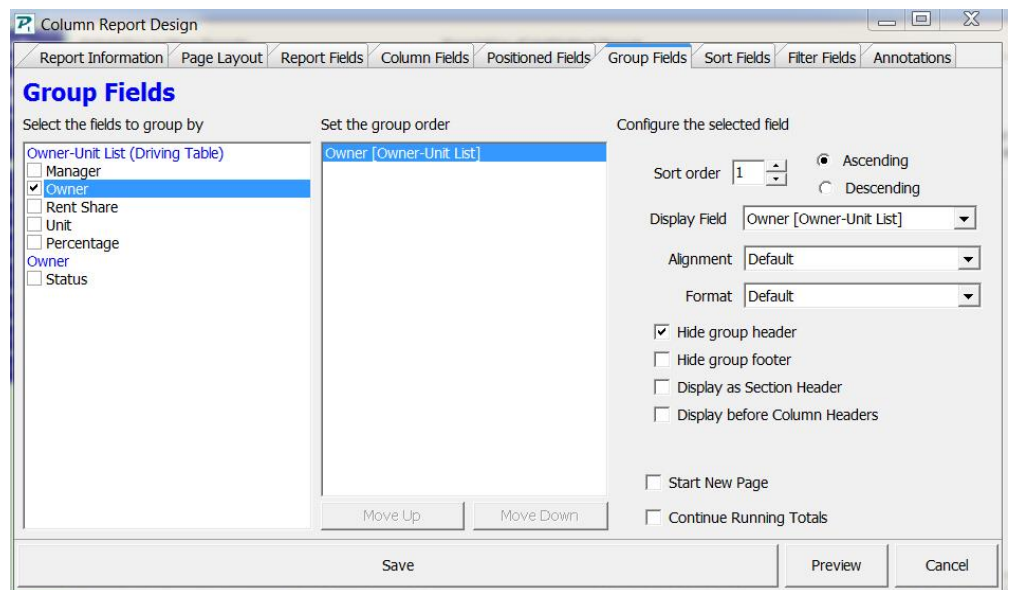
- Change:  
 Subtitle = none  
 Font Size= Large



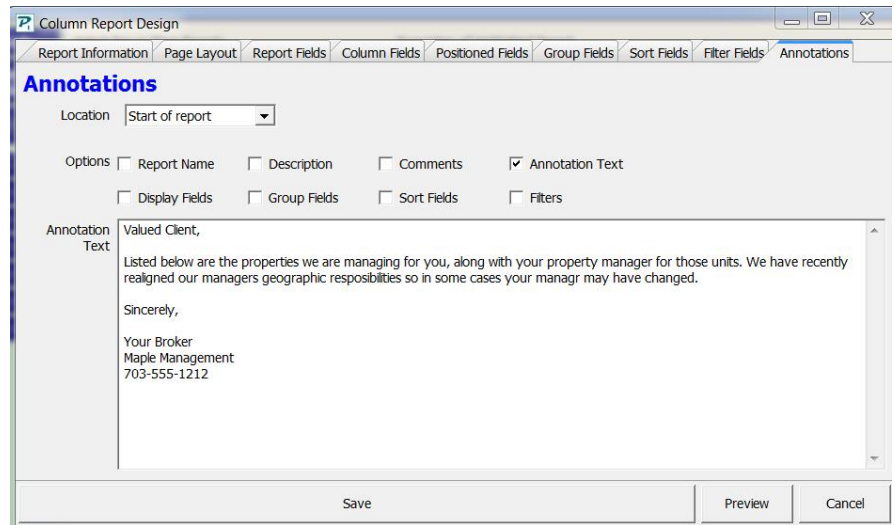
- On the Column Fields tab unmark Rent Share and Percentage column.
- Highlight Unit and blank out the Column Label Override field.



- On the Group Fields tab highlight Owners and mark Hide Group Header.

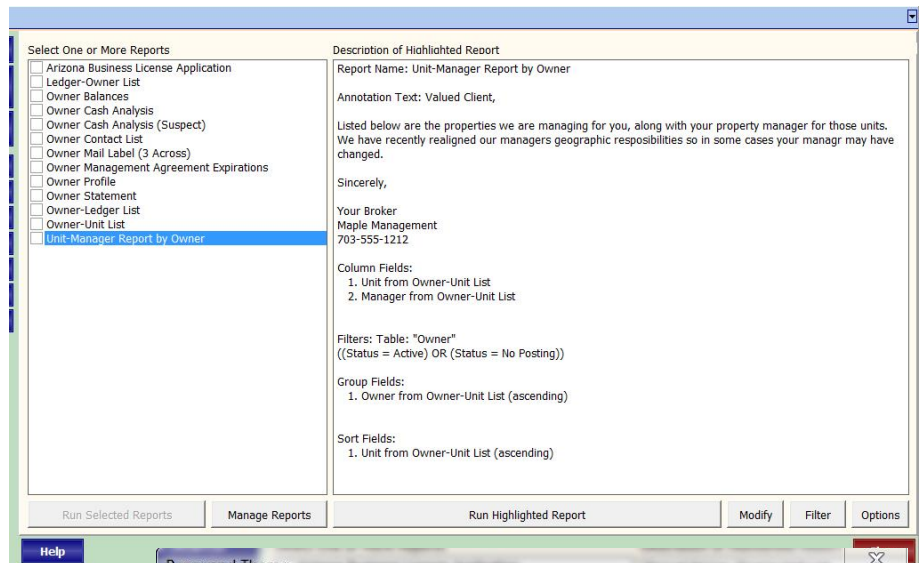


- On the Annotations tab, change Location to Start of Report. Enter your text. Then Save.

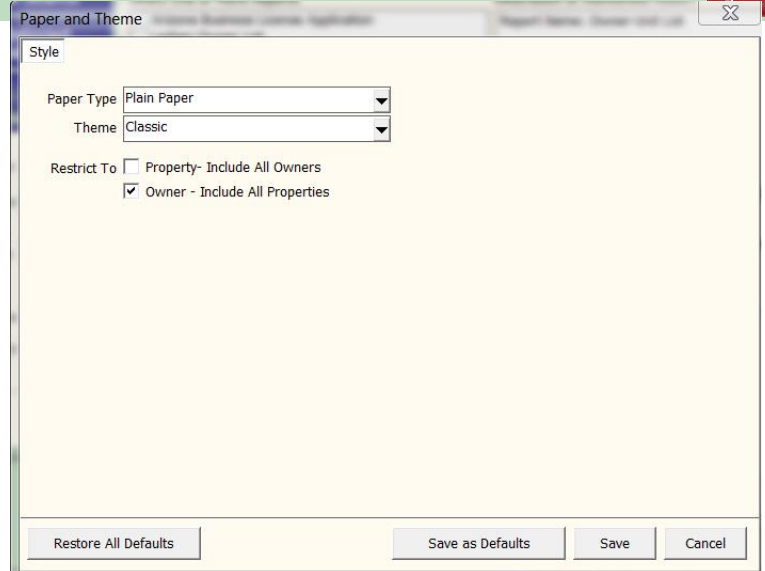


**To Run the report:** Go to Reports, Owner Reports.

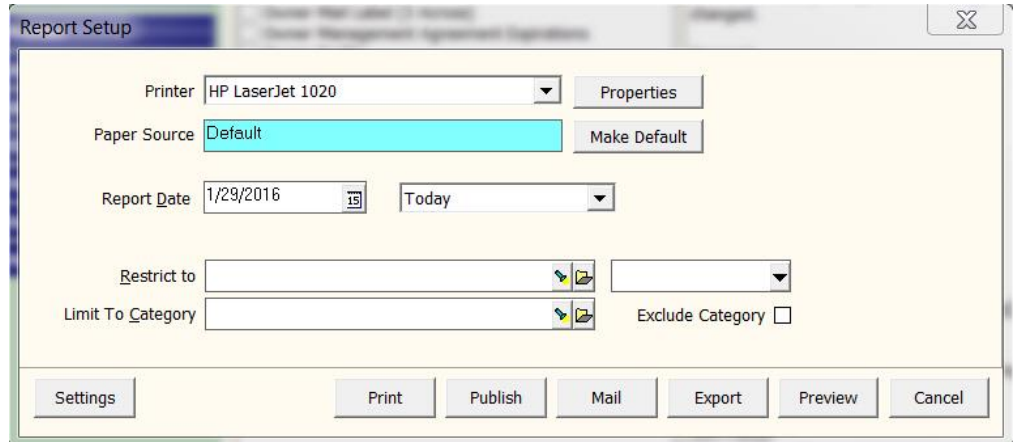
- Select the report from the report list and click Run Highlighted Report.



- Click Settings and change the Theme to Classic. Save.



3. Click Mail.



PROMAS Demonstration Package  
311D Maple Avenue West  
Vienna, VA 22180

This is a good place to put.  
Contact Information  
Phone numbers, Email addresses.  
It goes on statements.  
Whatever is here is centered in the statement block

Harrison S. Golden  
24 Haddock Street  
Gloucester, MA 07316

Valued Client,

Listed below are the properties we are managing for you, along with your property manager for those units. We have recently realigned our managers geographic responsibilities so in some cases your manager may have changed.

Sincerely,

Your Broker  
Maple Management  
703-555-1212

**Unit**  
327 Cedar Lane  
436 Fairway Drive

**Manager**  
Fritz Halfacre  
Emma Bull