

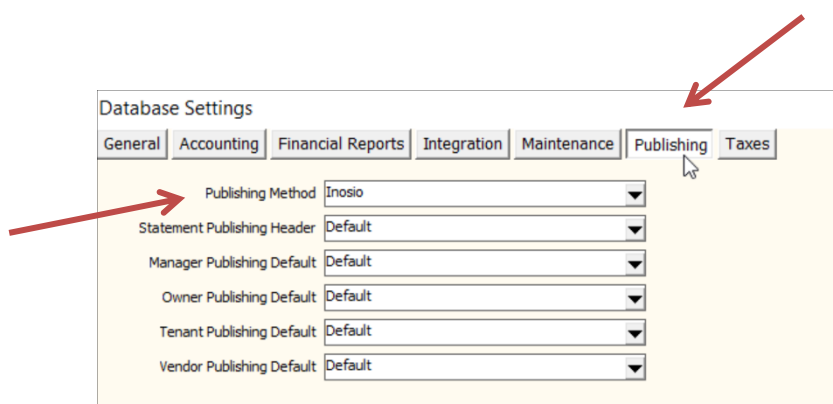
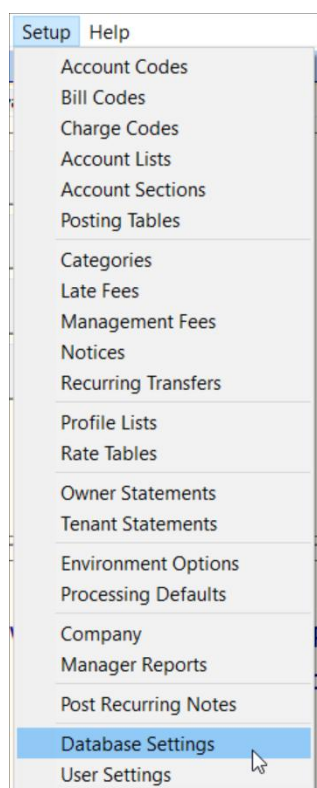
Contact Inosio

The first step is to contact Inosio to set up your owner portals.

In Promas

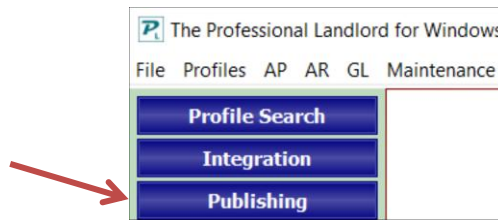
Once you have your owner portals established with Inosio, uploading statements and documents is done through Publishing in Promas.

You will first have to go to **Setup, Database Settings, Publishing tab**.



In Publishing Method choose Inosio or Inosio, Copy to Email. If you choose Inosio, Copy to Email and then Publish, the owner statements will be created in the LL12_Publish folder and uploaded to the Inosio portal. Then they will be moved to the LI12_Legacy folder so they can be emailed.

The Publishing button is available from any screen or function in Promas.



Click on Publishing to bring up the Basic tab for publishing to Inosio.

Publishing

Basic tab

Publish
Send Activity and Documents

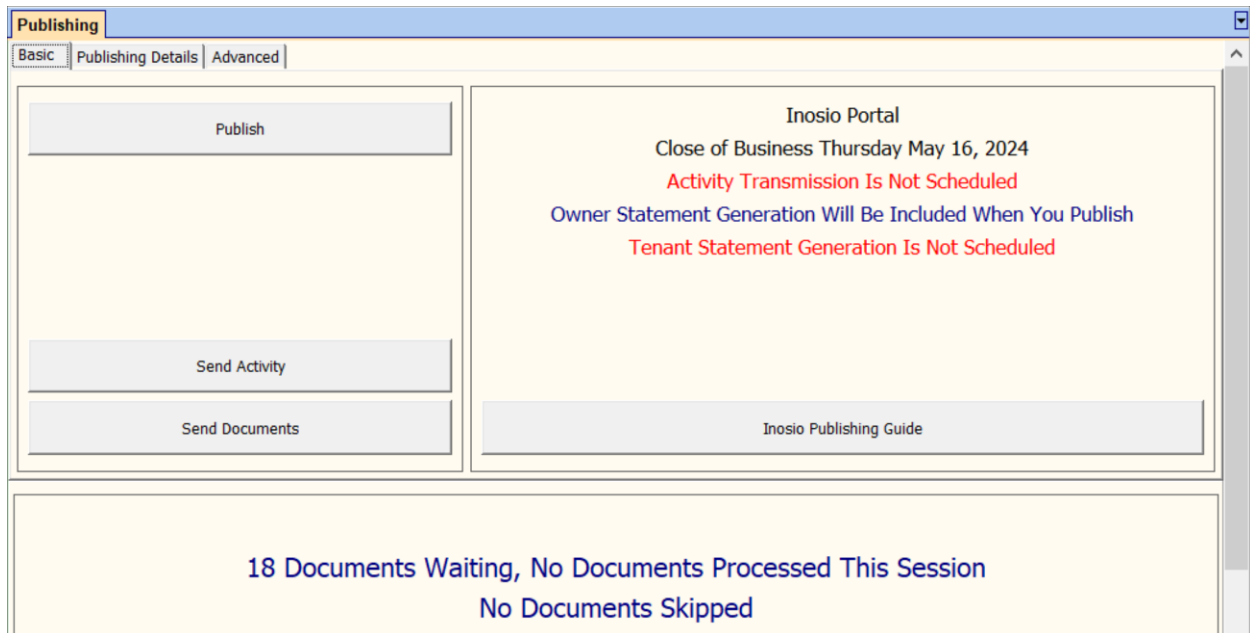
Publishing Details tab

Upload Manager
Owner/Tenant Statement Message
Open Email Publishing
Open for Business

Advanced tab

Publishing Settings
Integration Settings
Regenerate Owner/Tenant Statements

Publishing, Basic tab



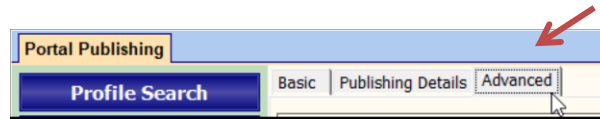
Click Publish to upload to the portal.

PDF documents that are created will be placed in the LL12_Database\LL12_Publish folder. Click Send Activity and Send Documents to just upload those, not publish statements.

- The right side of the screen shows what is scheduled based on parameters you establish on the Advanced tab.

- The bottom indicates any documents entered in the Document Manager on the Publishing Details tab. See Help document [R-396 Document Manager](#).

To set up parameters for publishing, click on the Advanced tab.



Advanced tab
Publishing Settings
General tab



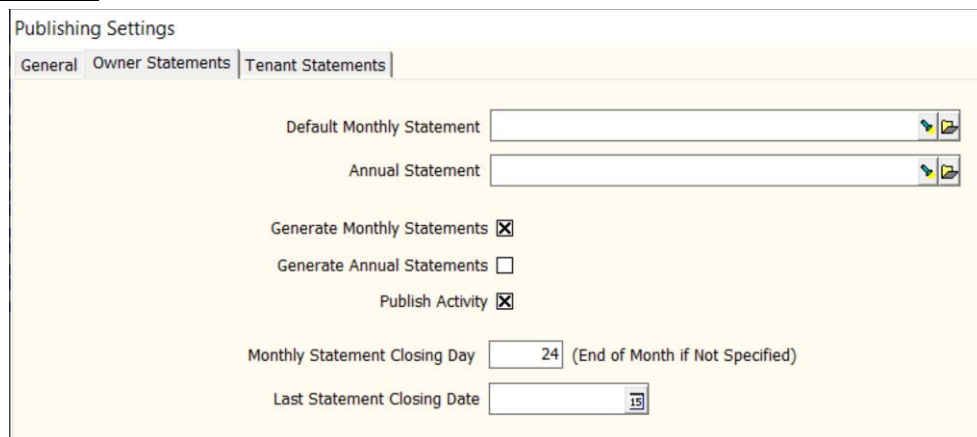
Publishing Settings

General | Owner Statements | Tenant Statements

Last Published


Last Published -- This is the last date that information was uploaded to Inosio. It will be set to today's date after publishing. (If the date is in the past, all appropriate statement uploads will take place based upon the owner and tenant settings and the date will be updated.)


Owner Statements tab



Publishing Settings

General | Owner Statements | Tenant Statements

Default Monthly Statement 

Annual Statement 

Generate Monthly Statements ☒

Generate Annual Statements ☐

Publish Activity ☒

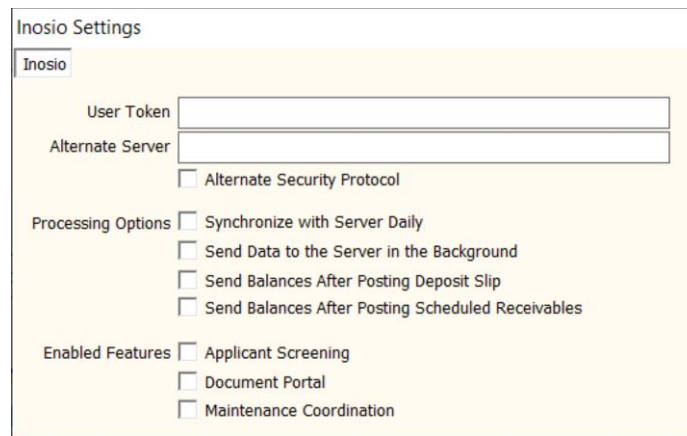
Monthly Statement Closing Day (End of Month if Not Specified)

Last Statement Closing Date

- Default Monthly Owner Statement – If no statement style is selected owners will get the statement identified in their profile. Owners with no statement selected in their PROMAS profile will get the statement style selected here. Owners marked "Do Not Publish to Internet" in their profile will not get a statement.
- Annual Owner Statement -- You can select from the drop down list an annual statement profile that all owners will receive for end of year. If left blank, owners will get the statement identified in their profile. Annual statements are generated when the January monthly statement is due. Select the End of Year statement.
- Generate Monthly Statements / Annual Statements / Publish Recent Activity -- The checkboxes, when marked, indicate what statements and activity will be generated when appropriate.
- Monthly Statement Closing Day -- If blank the statement closing date will default to the last day of the month. When a day is entered, statements generated, regardless of the day done, will be through that date. Thus choosing 12 would generate a statement starting the 13th of last month through the 12th of this month. All statements are based on the same schedule. Choosing 28, 29, 30, 31 defaults to the last day of the month.

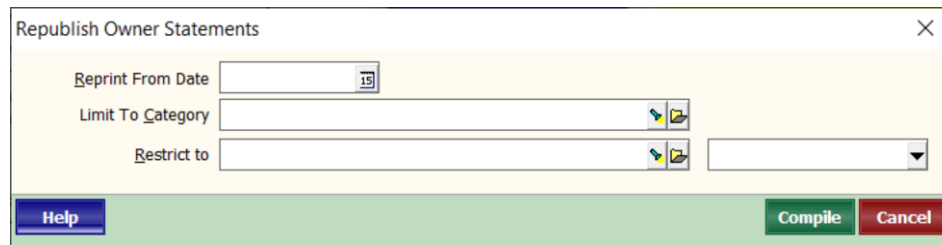
Do the same for tenant settings if applicable.

Integration Settings

The image shows a dialog box titled "Inosio Settings". It has a tab labeled "Inosio". Inside the dialog, there are several input fields and checkboxes. The "User Token" field is empty. The "Alternate Server" field is empty. Below these is a checkbox labeled "Alternate Security Protocol" which is unchecked. Under the heading "Processing Options", there are four checkboxes: "Synchronize with Server Daily" (unchecked), "Send Data to the Server in the Background" (unchecked), "Send Balances After Posting Deposit Slip" (unchecked), and "Send Balances After Posting Scheduled Receivables" (unchecked). Under the heading "Enabled Features", there are three checkboxes: "Applicant Screening" (unchecked), "Document Portal" (unchecked), and "Maintenance Coordination" (unchecked).

- Enter your User Token from Inosio here.
- See help document [R-931 Inosio Integration Guide](#), page 3 for details of the checkboxes here.

Regenerate Owner Statements

The image shows a dialog box titled "Republish Owner Statements". It has a close button (X) in the top right corner. Inside the dialog, there are three input fields: "Reprint From Date" with a date picker showing "19", "Limit To Category" with a dropdown menu, and "Restrict to" with a dropdown menu. At the bottom of the dialog, there are three buttons: "Help" (blue), "Compile" (green), and "Cancel" (red).

The regenerate statements can be used to:

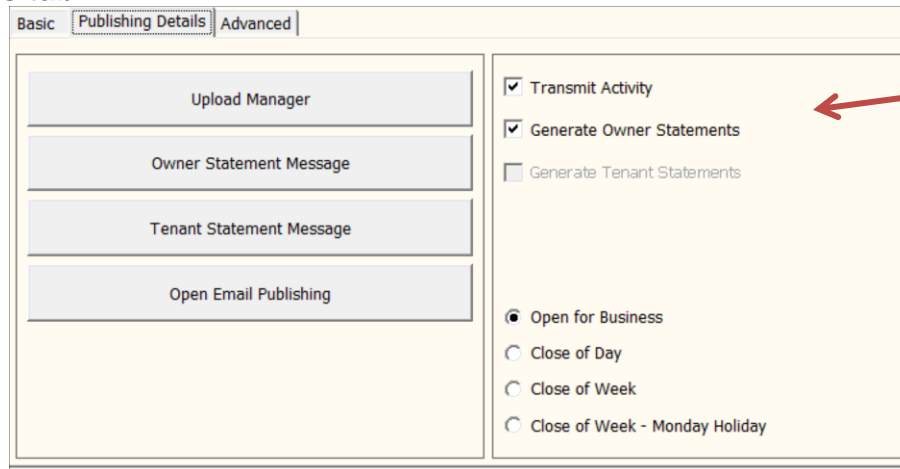
1. Correct the most recently published statement.
 - Click the Regenerate Owner Statements button.
 - Logon.
 - The Reprint From date defaults to the start date of the last published statement.
 - Enter any Restrict To or Limit To Category parameters. If there is more than one, you can create a profile list to use in the Restrict To.
 - Compile – the generated statements are added to the Upload folder and will publish when documents are uploaded next. The original statements will be replaced by the regenerated ones.
2. Publish past months statements. This is generally only done when publishing the first time.
 - Click the Regenerate Owner Statements button.
 - Logon.
 - Change the Reprint From date to a date in the past to generate a statement for each month.
 - Enter any Restrict To or Limit To Category parameters. If there is more than one, you can create a profile list to use in the Restrict To.
 - Compile – the generated statements are added to the Upload folder and will publish when documents are uploaded next.

3. Publish a statement to cover transactions for owners who have income and distributions posted after the normal statement closing date. The common practice is to publish activity for the owner to logon and view, but if a statement is necessary, follow the steps below.

Version 12 -

- Go to Mailings, Owner statements.
- Restrict to the owner or a profile list of owners and put in the date range.
- Click Publish. They will be in the Upload folder.
- Then go to Publishing and upload documents.

Publishing Details tab



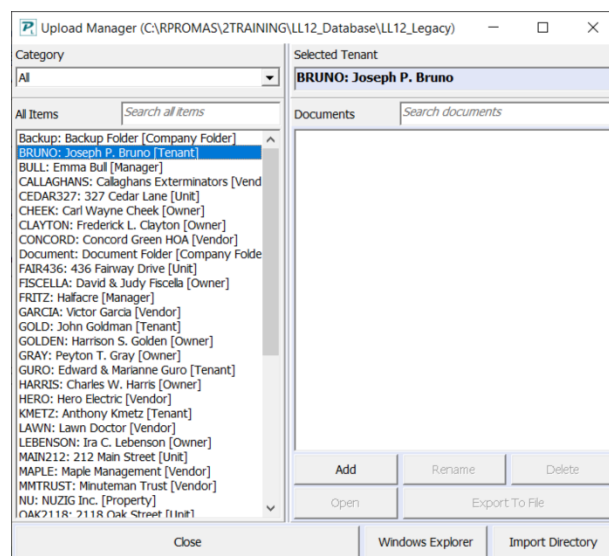
The screenshot shows the 'Publishing Details' tab with the following options:

- ☒ Transmit Activity
- ☒ Generate Owner Statements (indicated by a red arrow)
- ☐ Generate Tenant Statements
- ☒ Open for Business
- ☐ Close of Day
- ☐ Close of Week
- ☐ Close of Week - Monday Holiday

The checkboxes indicate choices you made on the Advanced tab, Owner and Tenant Statements.

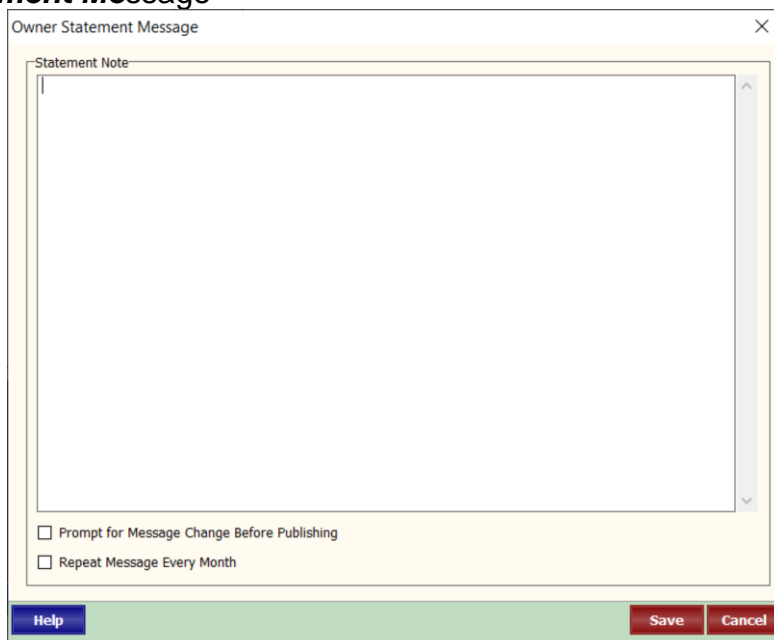
Upload Manager

See help document [R-396 Document Manager](#) for information on how to add documents to upload to the portal.



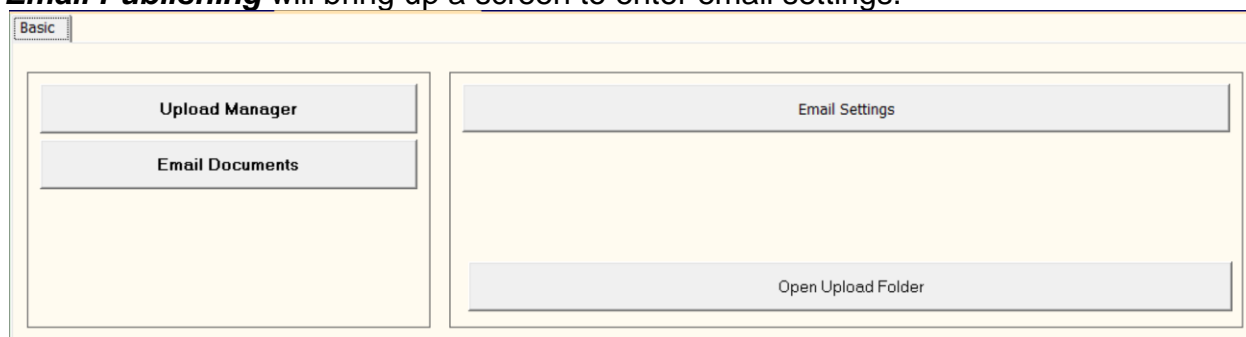
The Upload Manager window displays a list of items on the left, including 'Backup: Backup Folder [Company Folder]' and 'BRUNO: Joseph P. Bruno [Tenant]'. The 'Selected Tenant' field on the right is set to 'BRUNO: Joseph P. Bruno'. The 'Documents' section is empty. Buttons for 'Add', 'Rename', 'Delete', 'Open', and 'Export To File' are visible at the bottom.

Owner / Tenant Statement Message



This brings up a screen where you can enter a note to add to the beginning of each statement. The checkboxes allow you to be prompted to change the message each time you publish or to repeat the message every month.

Open Email Publishing will bring up a screen to enter email settings.



See help document [R-720 Email Documents](#) for information on entering your email settings.

Open for Business Section

Based on the selection the day published through is displayed.

- Open for Business - publishing is through yesterday.
- Close of Day - publishing through today. If tomorrow is your normal publishing date, you can initiate tomorrow's actions today.
- Close of Week - publishing is through Sunday.
- Close of Week - Monday Holiday - publishing is through next Monday.