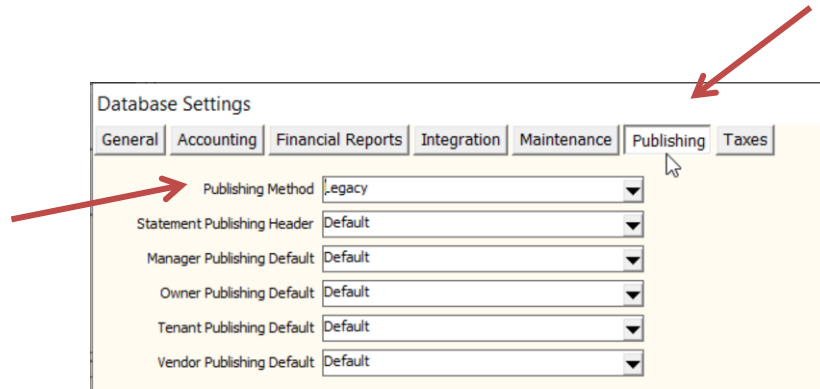
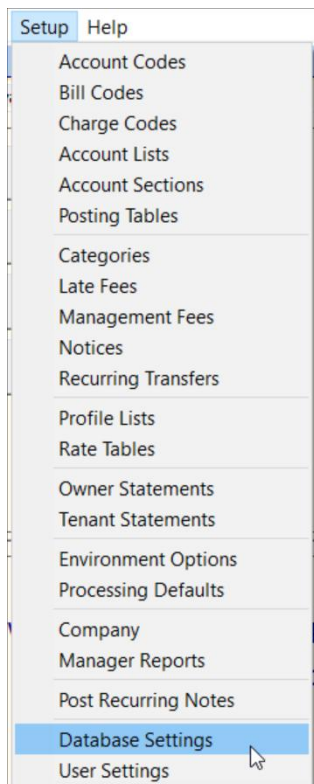


***Promas has had no relationship with HeroPM for the last 5 years. We can no longer test or maintain this integration. We strongly recommend that you contact our partner Inosio to learn about their integration.***

## In Promas

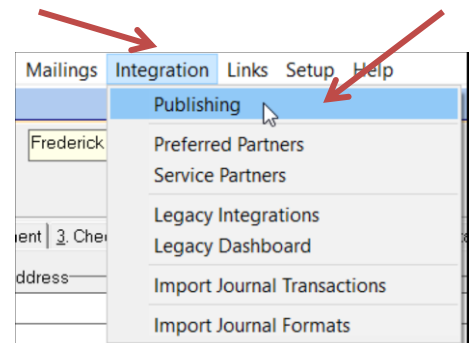
You will first have to go to **Setup, Database Settings, Publishing tab.**



In Publishing Method choose Legacy.

To Publish, click on Integration, Publishing

Publishing is a two step process. The first is to publish or create the pdf files of the owner/tenant statements. They will be put in the LL12\_Legacy folder. The second is to upload to the Legacy portal.



## 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

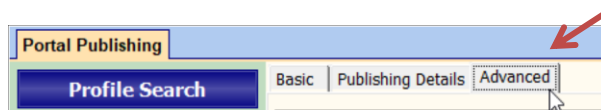
The screenshot shows the 'Publishing' window with the 'Basic' tab selected. On the left, there are three buttons: 'Publish', 'Send Activity', and 'Send Documents'. On the right, a 'Legacy Portal' section displays the message: 'Close of Business Thursday May 16, 2024', 'Activity Transmission Is Part of the Legacy Integration.', 'Owner Statement Generation Will Be Included When You Publish', and 'Tenant Statement Generation Is Not Scheduled'. Below this is a link to the 'Inosio Publishing Guide'. At the bottom, a status bar indicates '18 Documents Waiting, No Documents Processed This Session' and 'No Documents Skipped'.

Click Publish to create the pdf files to upload to the Legacy portal.

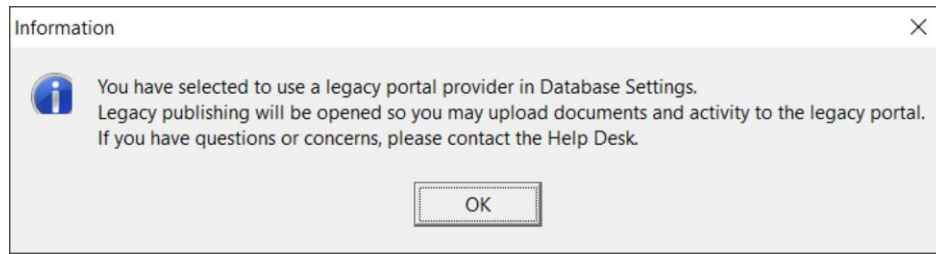
Click Send Activity and Send Documents to just upload those, not publish statements.

- 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.

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



**Publish:** After clicking Publish or Send Activity you will receive a message:



Click OK to go to a screen to upload the statements, documents, and activity that you have created. And to email documents if you choose.

The 'Legacy Publishing' screen has a top navigation bar with 'Publishing' and 'Legacy Publishing' tabs. Below it are sub-tabs: 'Basic' (selected), 'Publish Details', and 'Advanced'. The main area is divided into two columns. The left column contains three buttons: 'Upload to Legacy Portal', 'Email Documents', and 'Backup and Upload to Legacy Portal'. The right column contains an 'Upload Manager' section with three buttons: 'Owner Statement Message', 'Tenant Statement Message', and 'Logon'. Below these is a 'Connection Status' section with a red bar indicating 'Not Logged On'. Text below the bar says 'Upload Activity Is Next Scheduled for Close of Business 2/13/2025' and 'Upload Documents Will Be Included When You Upload'. At the bottom, there is a 'Close of Business Thursday February 13, 2025' section with four radio buttons: 'Open for Business' (selected), 'Close of Day', 'Close of Week', and 'Close of Week - Monday Holiday'.

If the screen indicates it will not publish activity you may have to change the Close of Business on the Publish Details tab.

### 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 tomorrows actions today.
- Close of Week - publishing is through Sunday.
- Close of Week - Monday Holiday - publishing is through next Monday.

Once that is changed you should be able to send activity and documents.

Publishing		Legacy Publishing	
Basic   Publish Details   Advanced			
<div>Upload to Legacy Portal</div> <div>Email Documents</div> <div>Backup and Upload to Legacy Portal</div>		<div>Upload Manager</div> <div>Owner Statement Message</div> <div>Tenant Statement Message</div> <div>Logon</div>	
Connection Status			
Not Logged On			
Upload Activity Will Be Included When You Upload Upload Documents Will Be Included When You Upload			
Close of Business Friday February 14, 2025			
<input type="radio"/> Open for Business <input checked="" type="radio"/> Close of Day <input type="radio"/> Close of Week <input type="radio"/> Close of Week - Monday Holiday			

## Advanced tab

### ***Publishing Settings***

#### General tab



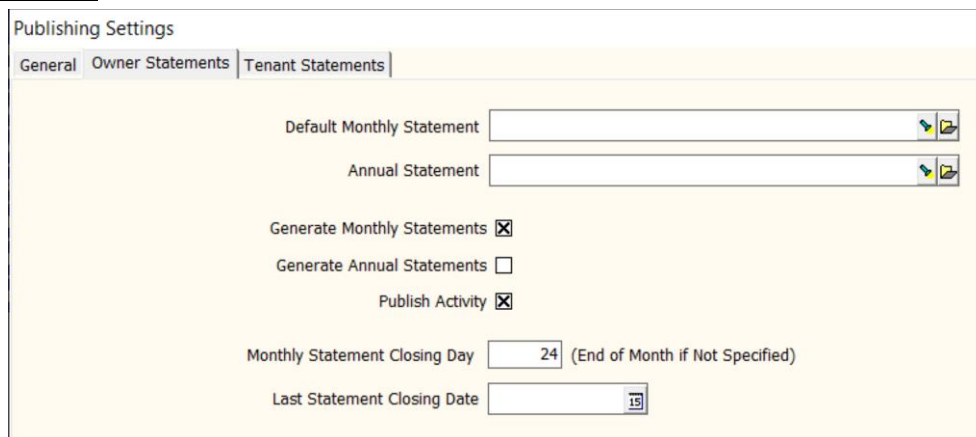
Publishing Settings

General | Owner Statements | Tenant Statements

Last Published


Last Published -- This is the last date that information was uploaded to HeroPM. 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 ☒

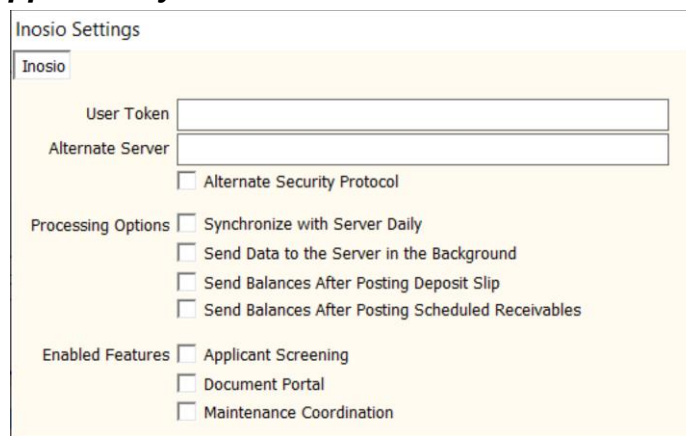
Monthly Statement Closing Day  (End of Month if Not Specified)

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.

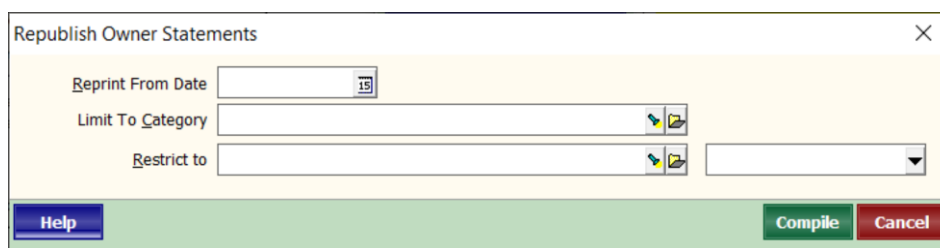
## Integration Settings – this applies only to the Inosio Portal



The Inosio Settings dialog box contains the following fields and options:

- User Token**: A text input field.
- Alternate Server**: A text input field.
- ☐ **Alternate Security Protocol**
- Processing Options**:
  - ☐ Synchronize with Server Daily
  - ☐ Send Data to the Server in the Background
  - ☐ Send Balances After Posting Deposit Slip
  - ☐ Send Balances After Posting Scheduled Receivables
- Enabled Features**:
  - ☐ Applicant Screening
  - ☐ Document Portal
  - ☐ Maintenance Coordination

## Regenerate Owner Statements



The Republish Owner Statements dialog box contains the following fields and buttons:

- Reprint From Date**: A date picker set to 15.
- Limit To Category**: A text input field with a search icon.
- Restrict to**: A text input field with a search icon and a dropdown arrow.
- Buttons**: Help, Compile, and Cancel.

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.

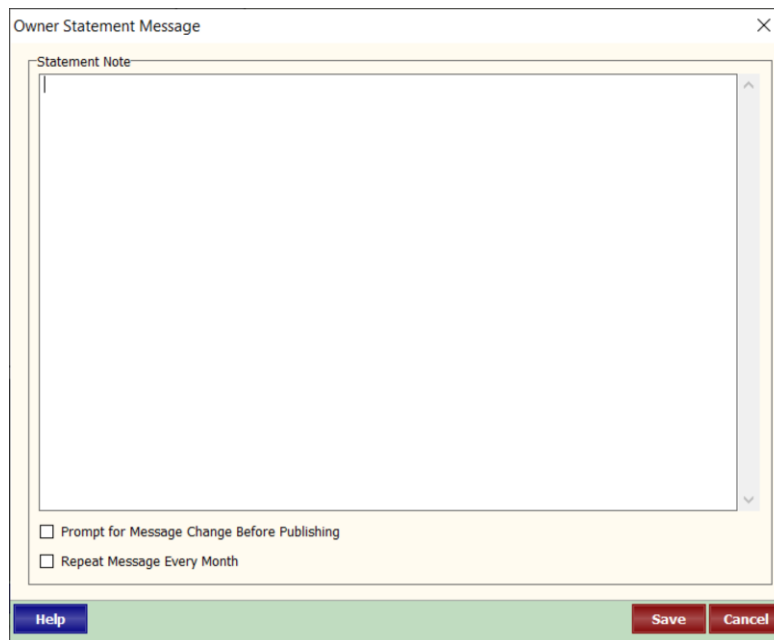
Version 12 -

- 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.

### ***Upload Manager***

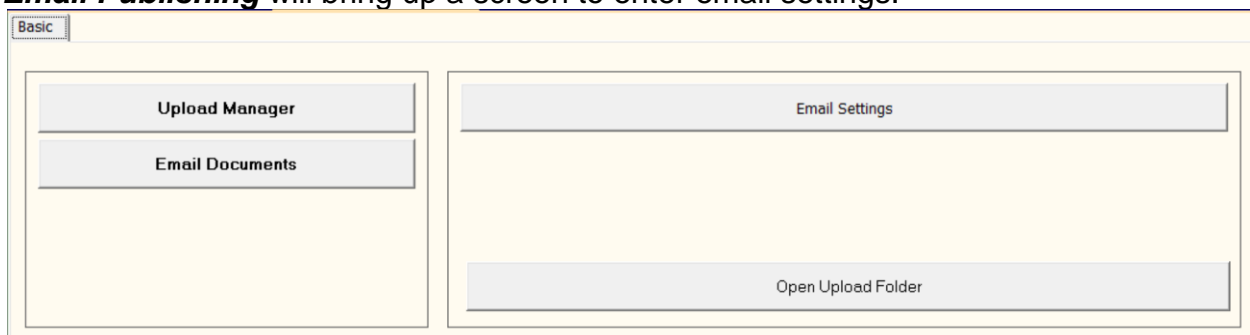
See help document [R-396 Document Manager](#) for information on how to add documents to upload to the portal.

### ***Owner / Tenant Statement Message***



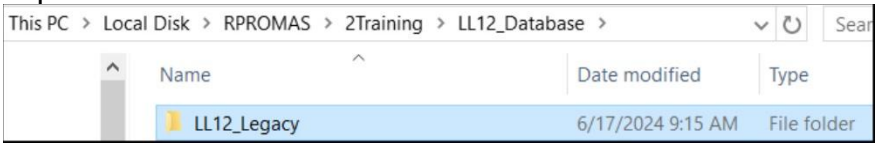
This brings up a screen where you can enter a note to add to the beginning of each statement. The checkboxes allow you to be prompted to change the message each time you publish or to repeat the message every month.

***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.

Click on the Open Upload Folder and then on the LL12\_Legacy folder to see the statements and documents ready for upload.



Click on the Log folder to see the log files generated by the upload and email.

