

### Current Version

The Production Release is Version 2009.3 Release 7 (June 24, 2009). Both the update and full version are available for download. The update adds fields to the database and must be installed while no other users are logged on. The Beta update is 2009.4 Beta 1. The items marked New are in the beta version.

#### Invoice History (New)

A Copy Invoice button has been added. This will open an invoice screen with a copy of the highlighted invoice. Changes can be made and saved. You will get the duplicate invoice message if you don't change the invoice number. Once saved, you can void or reverse the original invoice if appropriate.

#### Keystrokes in Lieu of Mouse Clicks

Mouse Clicks	Keystrokes
<New> in Tenant/Ledger Receipt	<F8>
<+> in Profiles	<F8>
<Save> in Profiles	<F12>
<Post> in Tenant/Ledger Receipt	<F12>
<Compile> in Scheduled Receivables, Scheduled Payables, Owner Statements, Reports	<F12>
<Print> or <Preview> in Reports	<F12>

You can right click on any screen to see what keystrokes can be used instead of using the mouse to click an action.

#### Tenants – HeroPM

Do you want to purge inactive profiles from the RP Management at HeroPM? Log on to HeroPM and go to the RP Management control panel. Click on System Function, then Database Utilities. From here you can purge the inactives or delete an entire profile set. An alternative is to mark the Autopurge checkbox in Configuration, System Options so inactives are purged during the synchronization process.

#### Invoice (New)

When you are creating an invoice from a work order, double click on the work order label (the words Work Order) to fill the work order number into the invoice number field.

#### Rate Table (New)

Two additional line items were added to accommodate tax requirements in Colorado.

#### Scheduled Payables (New)

On the Scheduled Payables screen you can now restrict the payee to a profile list. One use of this ability is for recording ACH transactions for vendors. Refer to Help on ACH Vendor Payments.

#### Tenant Receipt (New)

If the tenant selected is from a unit or ledger that is inactive, an information screen will display letting you know.

#### Owner Profile / Tenant Profile (New)

The taxpayer information is hidden. Clicking in the area will display the taxpayer ID until you exit the record.

#### Spell Checker (New)

Multi line edit fields like Notes, Work Order problem description, Letters and Comment fields now have spellcheck. Right click on the underlined word to show the list of optional spellings.

#### Remote Training/Remote Help

\$240 for 3 hours - call for details

## Landlord Inspector

The current version is 2009.5 Release 4.

Multiple photos can be attached to an inspectable item and several new reports have been added.

The program now supports maintaining the inspection documents in a centralized folder and database and then checking them out when an inspection is to be done.

A button has been added to the unit profile in PROMAS that will allow direct access to the inspections.

Pricing is \$495 for one license and \$100 for additional licenses in the same office.

Download a demo from [www.promas.com](http://www.promas.com) – click on Request Demo.

## Help File Updates

We sometimes update the Help files independent of changes to the program. These Help File updates can now be downloaded from the website. After logging in to the User site, click on Other Programs to find the new Help files. You can update the Help without updating the program.

## PROMAS Website

Users with current support agreements can logon and download updates from [www.promas.com](http://www.promas.com). The User ID is a 9 digit number which includes your zip code. The password is promas in lower case. You can change the password after logging on from the User menu, Account information. Call the Help Desk if you don't know your User ID.

## Request an Audit Review

A service performed by our experienced support staff. This is how it works: You send a backup of your data to us (see the Help on Send Us Your Data). We will audit your records and analyze your setup. You will receive a full report of our findings and recommendations. Pricing is based on one posting table.

**Pricing - \$225**

## Supplies We Provide

- Checks-preprinted and blank (MICR)-How To doc.#301
- Deposit Slips - laser, perforated - How To doc.#301
- Envelopes for statements/checks-How To doc.#301
- End of Year Forms - 1099's, W2, Interest forms, Envelopes - order using How To document #310
- MICR Toner Cartridges - call for details
- Check reader - call for details

## Tracking Routine Maintenance

Regular services on furnaces, fireplaces, gutter cleaning, swamp coolers, etc can be tracked using categories and tickler reports.

Set up a new category for the service type. Set the *Reminder Type* to "Effective or Expires".

In the Unit Profile, add the category. Put the Vendor Name in the *Qualifier* field. Enter the last time the service was performed in the *Effective Date*. Enter the next time in the *Expires*. Enter any notes/particulars in the *Comment* field.

For a report on work done or needing to be done go to Tickler Reports and select the date range. Unmark all checkboxes except *Category Reminders*. Select the service in the *Limit to Category* field.

After the service is performed, edit the Unit category to put the date in the *Effective* field and put the next time to be done in the *Expires* field.

## Alerts for Work Orders

You do not want to forget that a property is under home warranty or that an owner wants special vendors used for various types of repairs. Setting up a category for these situations and assigning it to the unit or ledger will cause the alert to be displayed when the unit is selected as the workorder site.

Categories can also be used for tracking inspections, insurance expirations, management agreements, loss types, annual services. Refer to Help, Category Examples for more details.

## Tenant Receipts

The default for tenant receipt printing is a payer copy and a file copy on a standard sheet of paper. The receipt includes the amount received, date and time, who received it, and the amount still owed (if any).

Options related to the printing of a receipt include printing just the payer copy (/receiptsingle) and printing the receipt and posting (/printandpost) when the print button is clicked. After printing you are returned to the receipt screen. Options are entered in Setup, Processing Defaults, RPM tab.

## Training classes - 2009

**Basic:** Orlando - October 19, 20 (pending)

**Advanced:** Orlando - October 21 (pending)

*Classes need a minimum of 12 attendees.*

**Registration forms:**

**[www.promas.com/pdf/training302.pdf](http://www.promas.com/pdf/training302.pdf) or In PROMAS, click Links, Training Schedule**