

### Current Version 6.9.36

The current version is 6.9.36. If you are not on this version we encourage you to upgrade at your earliest convenience. If your version (Help, About) is prior to 6.9.0, please review the Conversion Notes on the download page prior to updating. If your version is prior to version 6 please call the Help Desk for advice on how to proceed.

### Statement Note

A statement note that you enter this month will fill in the statement note field the next time you do member statements. If you use different statement notes depending on the time of year, you can store all the notes as an active association note or as category comments. When you want to use them, do a copy (highlight, press <Ctrl> <C>) and then paste (<Ctrl> <V>) into the statement note field.

### Deposit Slip

Suppose the deposit slip recorded in PROMAS differs from the one recorded at the bank. If there are line items that need to be taken off the deposit slip, go to <<GL, Bank Account History>>, select the Bank, click on the Deposits tab, highlight and edit the deposit slip. To remove items, unmark them, change the deposit slip amount, and Post. Print a copy of the revised deposit slip before posting. Items removed from a deposit slip will be in <<GL, Deposit Receipts>> awaiting deposit.

If there are items that need to be added, go into <<GL, Bank Account History>>, select the Bank, click on the Deposit tab, highlight the deposit and void it. The receipts on that deposit will be returned to <<GL, Deposit Receipts>> to be included with any other receipts you need to add.

### Backup

There are several ways to backup a database within PROMAS. One is from the File dropdown and it creates a folder within the database folder with a label of YYYY-Month name-DD (e.g. 2007-June-11). Another is in Help, About called "Create Zipped Data", which makes a zipped file named AP6\_Data.zip in the APROMAS\ Support folder.

Making a backup and then periodically copying the backup(s) to a CD is an excellent supplement to your daily backup. Refer to Help, Contents, Procedures, Backing Up for details on backing up.

### VISTA

We recommend waiting to implement machines with the Vista operating system until after Service Pack 1 is released - probably early next year. There are many "permissions" issues that need to be addressed, especially on a network. To view our log on Vista issues, use the Links dropdown in PROMAS and select Vista Issues.

### Remote Training/Remote Help

\$240 for 3 hours - call for details

## GL

### Deposit Receipts

Double click in the Total Marked field to fill in the deposit amount.

### Deposit Slip

The deposit slip that prints includes the bank MICR line and uses a perforated form that prints the deposit slip on the top portion and details on the bottom portion. Up to 26 receipts can be listed on each sheet. If more than 26 receipts are on a deposit, additional sheets of deposit slip/details are printed. Only part (page) 1 of the form contains the MICR line.

The MICR information is entered for each bank account in Setup, Account Codes on the MICR Check Setup tab. The MICR font must be installed and MICR toner must be used if your bank does not use optical readers.

The address printed on the deposit slip comes from the Return Address Block of the MICR Check Setup tab of the account code for the bank account. If that field is not filled in, the address will be pulled from the Mailing Address of the Company profile (Setup, Company).

## Email

Have a suggestion on how we can improve the software? Click on the Links dropdown and select "Email a Suggestion".

Have a question about how to do something? Click on the Links dropdown and select "Email the Help Desk" or "How To PDF documents". If you have an issue that needs immediate attention, call the Help Desk at 800-397-1499.

### MICR Check Reader

**The optional MICR Check Reader module includes a check reader and the software to enable check scanning. The machine reads the MICR codes on the check. Once you have scanned a check the member receipt screen will automatically fill in the member name, amount owed and the check number. All you have to do is verify the payment amount and post. It will speed up processing and eliminate the possibility of posting a payment to the wrong member. The cost is \$495.**

## 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
- Monitors-LCD 19" from training classes-call for availability
- Check reader - call for details

## User Manual

The User Manual has been updated for Version 6.9. It reflects the changes made and additions to PROMAS since the manual was rewritten for Version 6 several years ago. If you would like a new manual, the following options are available.

Media	Cost
PDF, 390 pages download from web site	\$0
Printed Manual, 390 pages 3 ring punched, color printed	\$48 + \$8 shipping
Manual + Binder, 390 pages	\$60 + \$8 shipping

## Deleting a Category

You can delete a category while editing one in <<Setup, Categories>> by clicking the minus button on the bottom of the form. You will be warned if the category has been assigned to a profile. IF you choose to continue, the category will be deleted as well as all references to it in all profiles. If the category has been used you must have exclusive access similar to that needed to rebuild.

## Links

The Links dropdown from the main taskbar provides easy access to information available on the PROMAS website. The Checks and Forms catalog, Getting Acquainted Manual, Network Setup instructions, and How To PDF documents are some of the links. You can get directly to the password page to Download an Update.

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