

Current Version 2009.4 Beta 2

The current version is 2009.4 beta 2. If you are not on Version 2009 we encourage you to upgrade either now or when it becomes a non-beta release in early July. If your version (Help, About) is 2008 or 6.9, install the update. If 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.

Logo / Signature on Check

The ability has been added to print logos and signatures on checks. Please contact technical support if you would like more information about these new features.

Additional Letterhead Information

If you use the additional letterhead information field (found on the association profile and company profile) on your letters, each line now centers in the box. For accurate centering, left justify each line.

Email Address

Member and vendor email addresses have been expanded to 120 characters. Separate multiple email addresses with either a comma or a semicolon depending on your default email program.

Recurring Charges

This function can be used to give credits to members on a scheduled basis. To do so, enter a negative amount. When Recurring charges are posted the equivalent of an adjust open credits transaction will be posted.

Spell Check

Live spell checking has been added to all fields that have scrolling edit controls – this includes letter body, memo, note and comment fields.

Profile, Association

The association profile has a mailing address and remittance address. The mailing address will be used for tax reporting. The remittance address will be used for coupons. Other functions like letters let you choose the one you prefer.

Bank to Bank Transfer

The <<GL, Bank to Bank Transfer>> function will allow loading all balances from each ledger having a balance in the selected “From” bank. This is useful when the association changes banks.

AR, Batch Member Receipts

Charges up to 20 days in the future will be included in the sum of unpaid charges when determining which transactions can be automatically posted.

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.

Remote Training/Remote Help

\$240 for 3 hours - call for details

Version Numbering to Change

Example 2009.4 Release 2

The year (2009) means that the IRS has approved the electronic submission to be done in that year. The minor revision number (4) means it is the 4th significant update for the year. Release and Beta are used to describe the status. The Release number (2) indicates the number of minor revisions for the release number.

Users who get mailed updates will only be mailed releases deemed to have significant changes that have been in broad release long enough to be considered final. There will be no more than 2 in a year.

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 LOGIN page to enter your user ID and password to Download an Update.

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.

Vendor Check Details report

The transaction reference (invoice number) has been appended to the description field.

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
- Check reader - call for details

Budget Reports

The budget reports can now be consolidated either by an association with its funds or all associations and funds in the same database.

Reports

The General Ledger report Unpaid Charge Details now includes any outstanding vendor credit memos.

Backup

There are several ways to backup a database within PROMAS.

One is from the File dropdown. It creates a folder within the database folder with a label of YYYY-Month name-DD (e.g. 2009-June-11). It contains the necessary files from the database folder.

Another is in Help, About called "Create Zipped Data", which makes a zipped file named AP6_Data.zip in the APROMAS\Support folder. Note that each time you do this it overwrites the previously made file.

Note that if you use common vendors for several databases, that COMMON folder is not included in the above backups.

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.

Invoice History

If you mis-code either the Bill To or Code on an invoice and don't realize until after the check has been cut, you can change either or both in <<AP, Invoice History>> . Find the invoice, click <Edit>, and highlight the line item. That will display the <Change Billing Info> button. Change the selection and click <Post> .

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