Integrate with HeroPM

What is Hero PM and PROMAS Central?
HeroPM is the new name for what used to be called PROMAS Central. It consists of the HeroPM Control Panel on the Hero PM web site that manages the owner, tenant and vendor on-line portals. Information is uploaded to HeroPM from the Internet Publishing function in PROMAS.

HeroPM / Internet Publishing Requirements Checklist

On Promas Release 2015 or above
Internet Publishing enabled in PROMAS application
HeroPM (Platinum or Bronze) contract
Ability to export PDF from PROMAS application
Windows 7, 8, or 10 compatibility settings enabled

Refer to HeroPM FAQ on next page.

HeroPM FAQ

Q. What version of Promas should I be on?

a. any version of Version 6 or Version 12 for Release 2016 or above

Q. How can I tell what version I am on?

a. In the PROMAS application, go to Help, About

Q. How can I verify I am registered for Internet Publishing?

a. In the PROMAS application, go to Help, About and look for “Publishing Module”. If you see it then you are registered for it. If you do not see it, please call the help desk at 1-800-397-1499 for assistance.

Q. Is there any cost for HeroPM?

a. Yes. Please contact Hero PM for pricing.

Q. Can I publish from a Windows 7 or 8 or 10 computer?

a. Yes, but there are some compatibility settings you should set first

Go to Setup, Processing Defaults
Click on the RPM tab
Click into the Customized Programming Options box
Type /PDFBATCH
Click Save

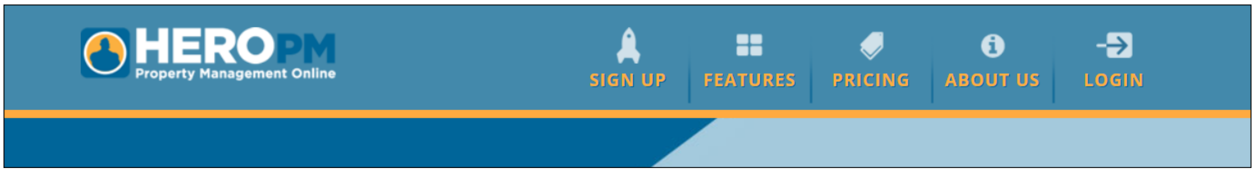
Q. How do I tell what version of Microsoft .net framework my computer is running?

a. Go to C:\Windows\Microsoft.net\framework. If there is no v4.0 folder (or above), then Google '.net framework 4' and download and install.

To get started, do the following:
<u>One Time:</u>

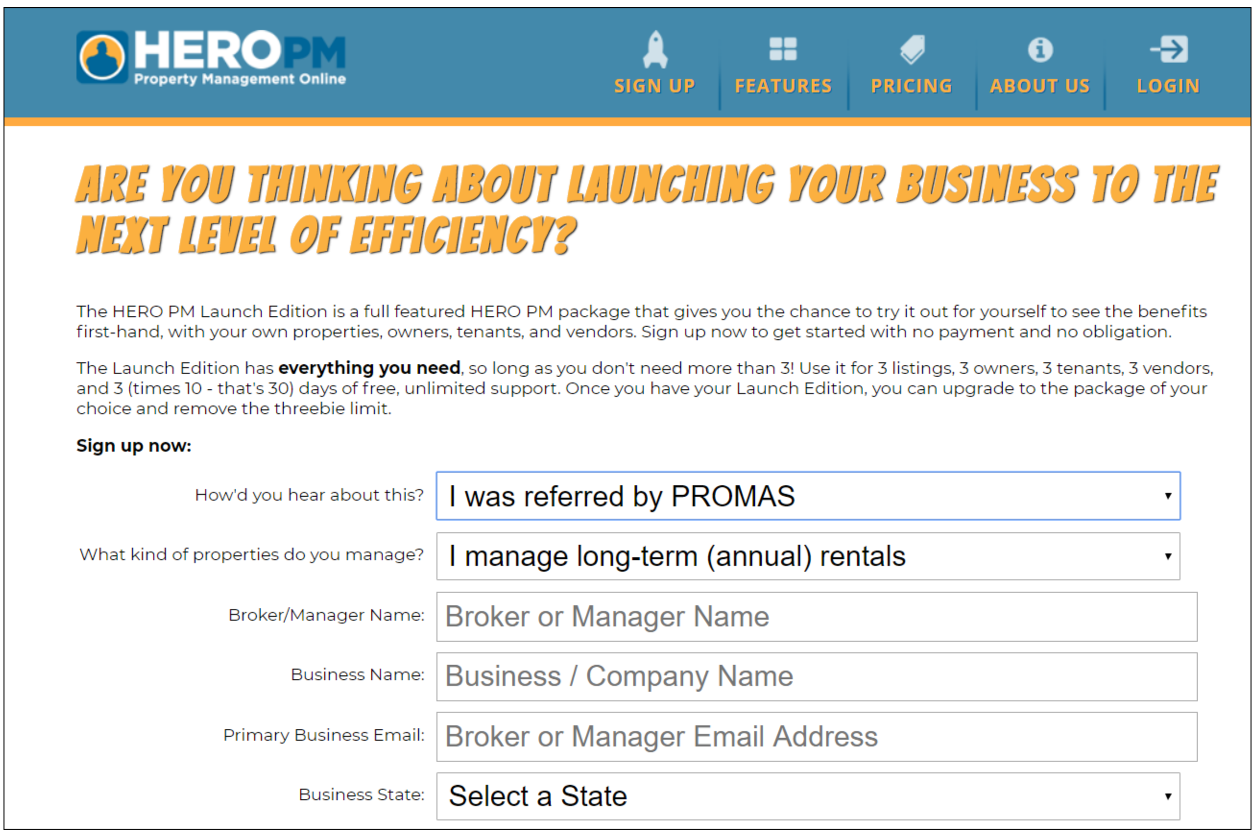
i. **Pay for HeroPM subscription.** If you already have Hero Platinum or Bronze there is no additional cost to integrate with HeroPM. Contact Hero PM to get the right package for integrating from PROMAS.
   a. Call the PROMAS Help Desk to register for the IP (Internet Publishing) module if it is not already enabled (look in Help, About to check).

2. **Set up a HeroPM web account.** (Skip this step if you have a HeroPM Platinum or Bronze account.)
   a. Go to www.HeroPM.com.

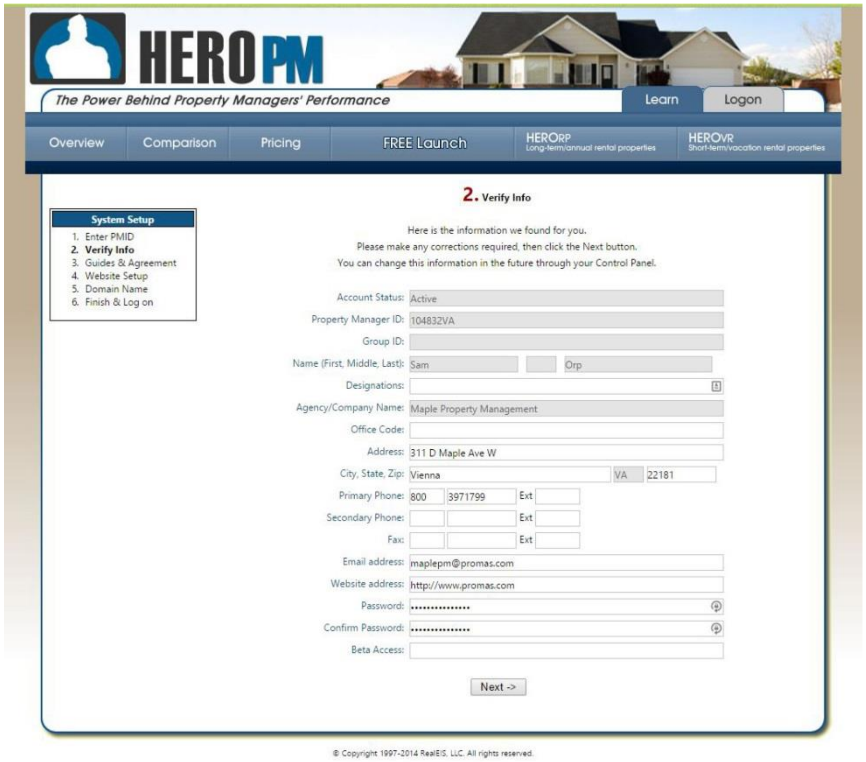


   b. Click Sign up.

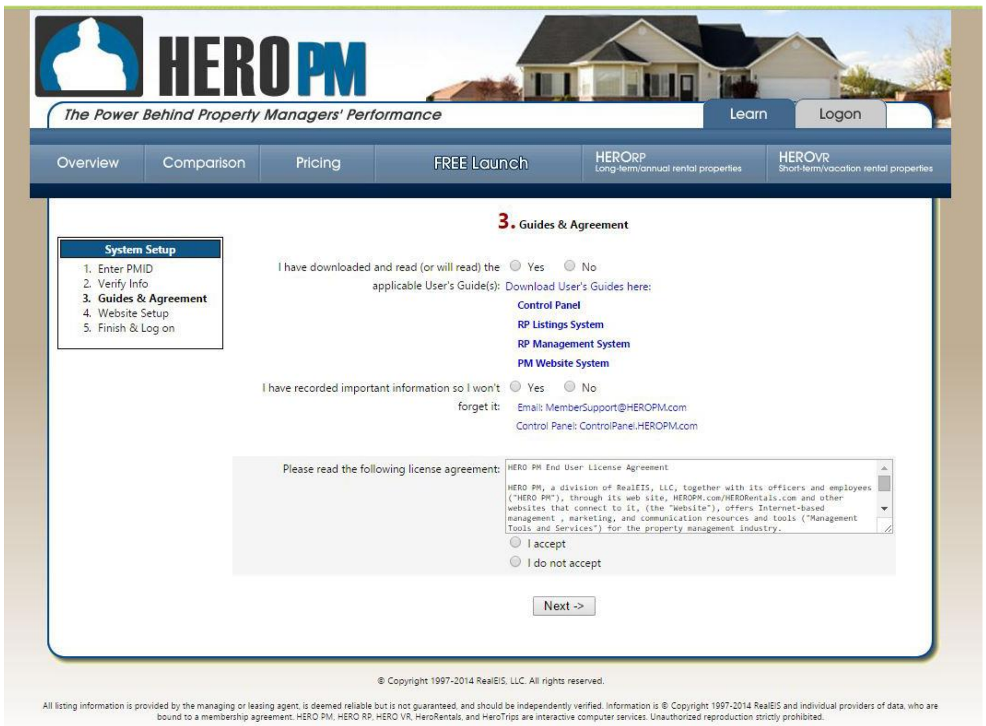
   c. Fill in the form. Make sure you scroll down to be able to fill in all the fields.



d. Click Sign up now.
e. You will receive an email with setup instructions and a link to the screen where you will link to your property account.
f. Click on the Setup link in the email.
g. Follow the instructions and fill in the appropriate fields. The PMID gets filled in for you. Click Next.



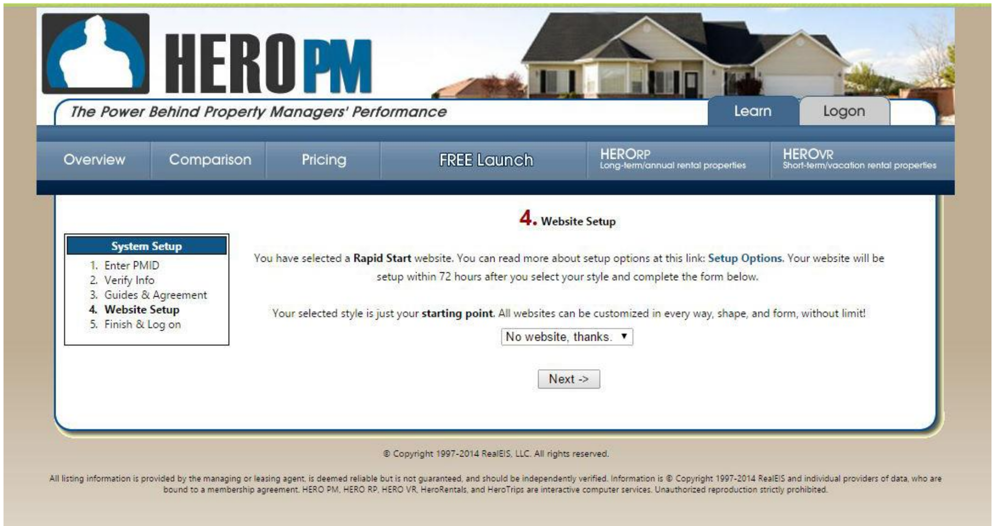
h. On the Verify Info screen change your password to one that is easy for you to remember. Enter any other pertinent company information. Click Next.



i. On the Guides & Agreements screen mark Yes, Yes, I Accept. Don't bother printing the User Guildes now. They can be printed from the Links dropdown later.

Skip the website setup page. If you want you can do that later.

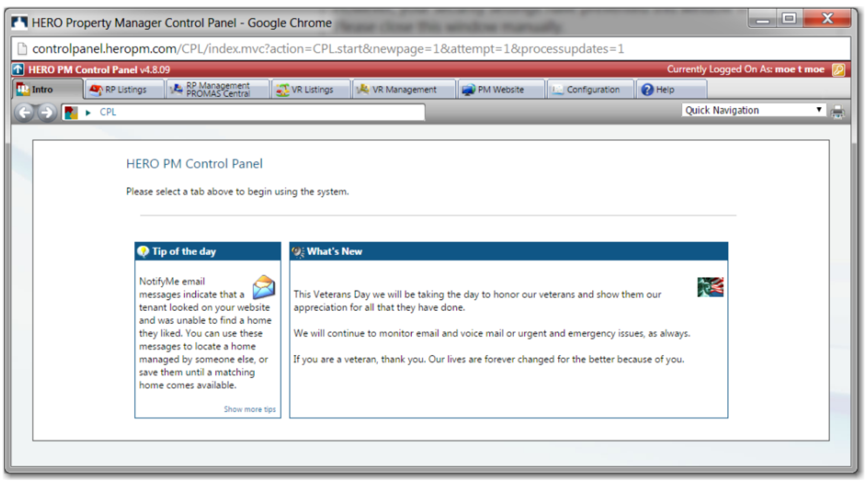
j. On the Website Setup screen click Next.



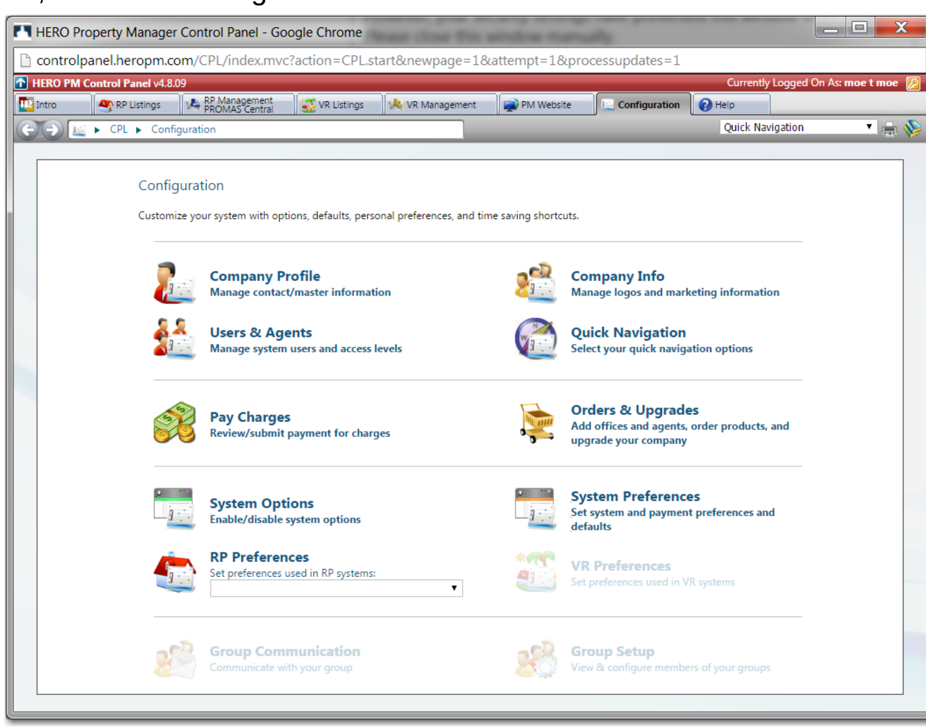
NOTE: The intro screen, prior to full activation, displays an Upgrade Options button. Choose either the upgrade to Bronze ZL or Platinum ZL. Enter the electronic signature and date, then click Submit Order. If your payments will be to HeroPM, continue through the payment cycle.

3. Logon to HeroPM Control Panel - 1st time

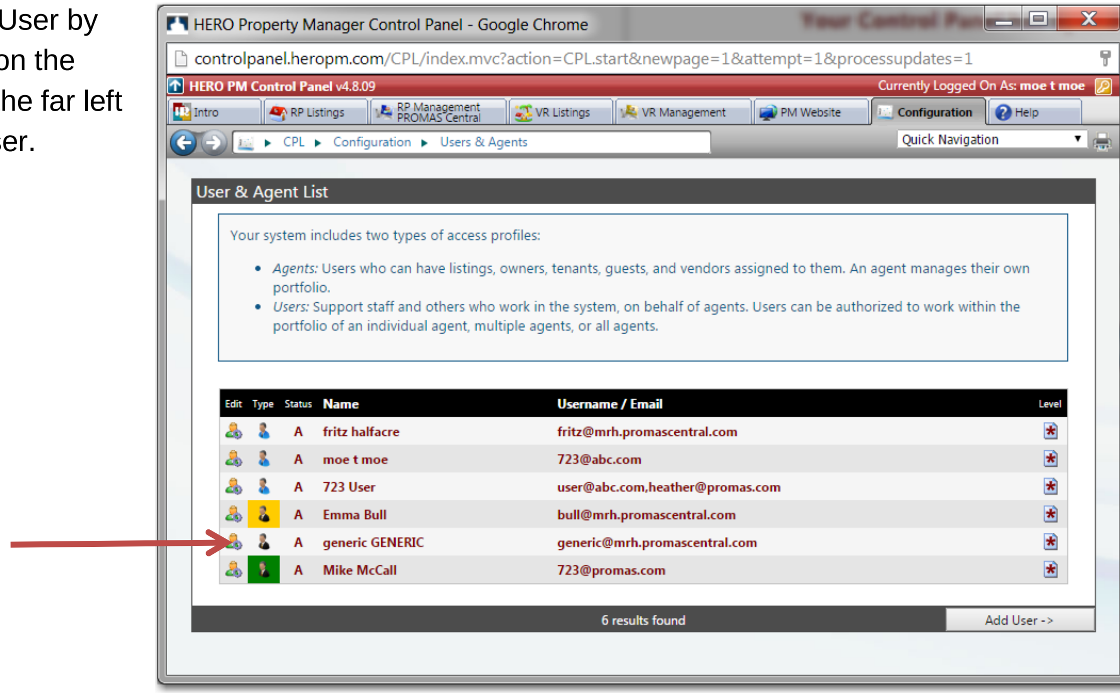
a. Logon as Master Administrator with a User Name of your PMID (the 10####SS given by HeroPM) and a Password of propertymanager. Follow the prompts.



b. Click the Configuration tab, then Users & Agents.

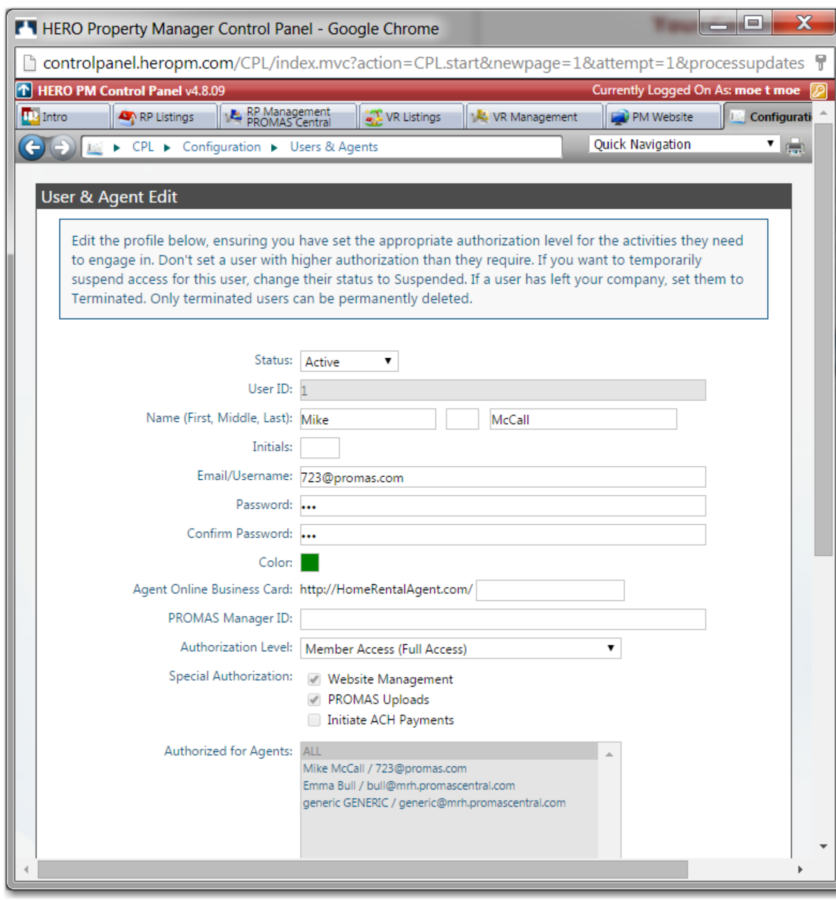


c. Edit the User by clicking on the icon on the far left of the user.



Change the password. Set the desired Authorization level. Mark the PROMAS Uploads checkbox and others as appropriate. Click Save User at bottom right. Add additional users as appropriate.

To continue, sign out of the control panel as Admin so you can log in as user in Step 4.

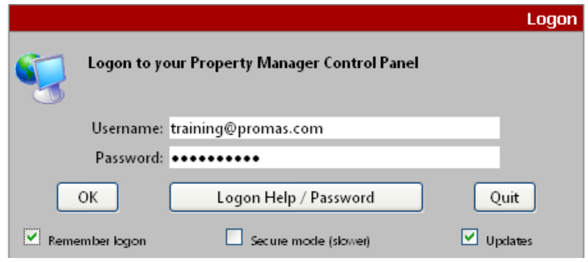


4. Configure the HeroPM control panel.

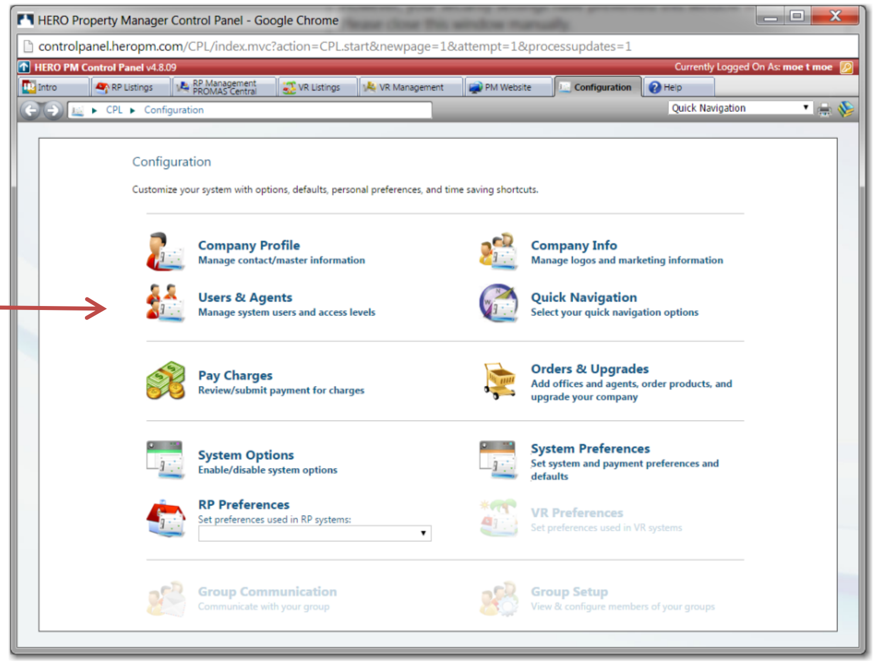
a) Log on as a User to the HeroPM Control Panel.

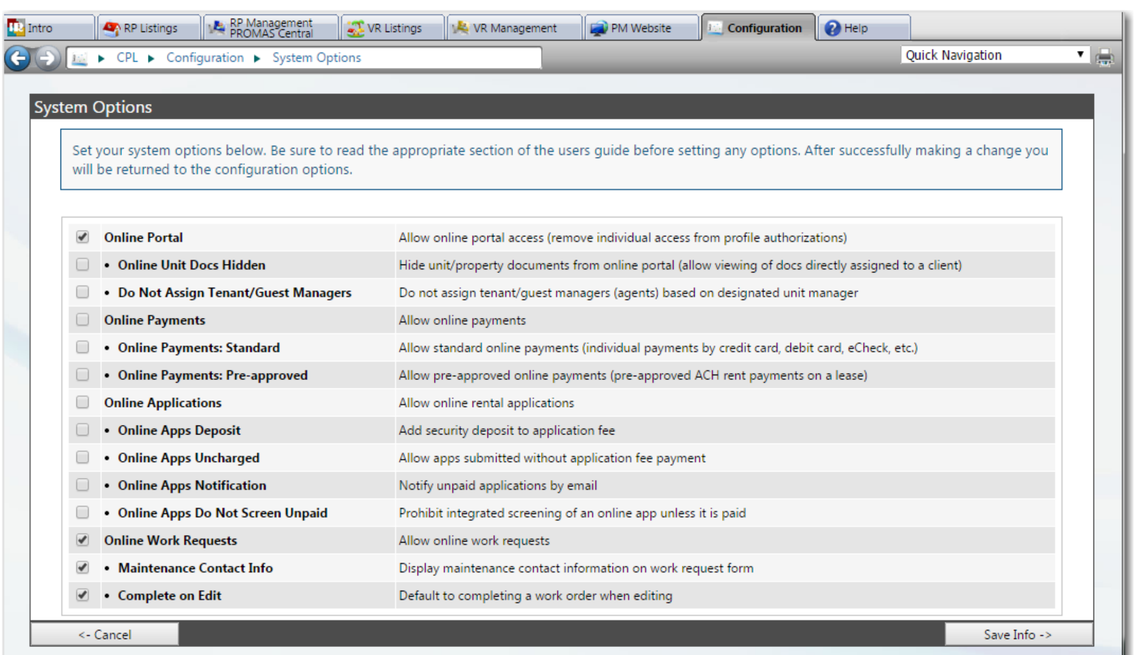
   i. (In PROMAS, click on Links, HeroPM Control Panel login.

   ii. Enter your User ID and password. Click OK.)

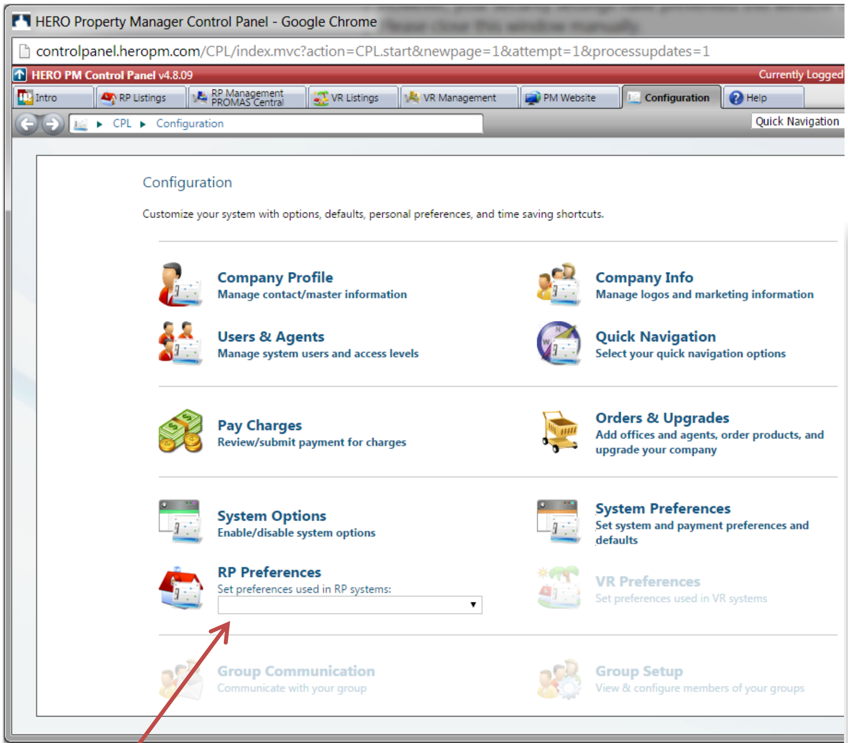


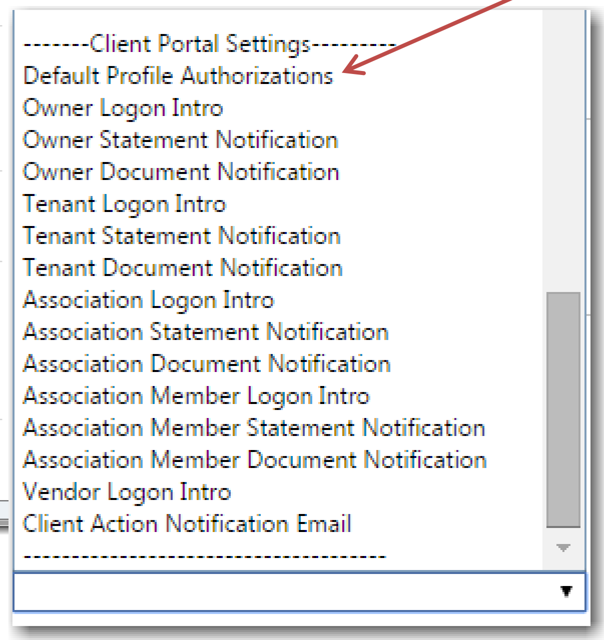
b) Click Configuration tab, then System Options – Mark Online Portal, Assign unmatched profiles to generic agent, and any others that you want, then click Save Info.



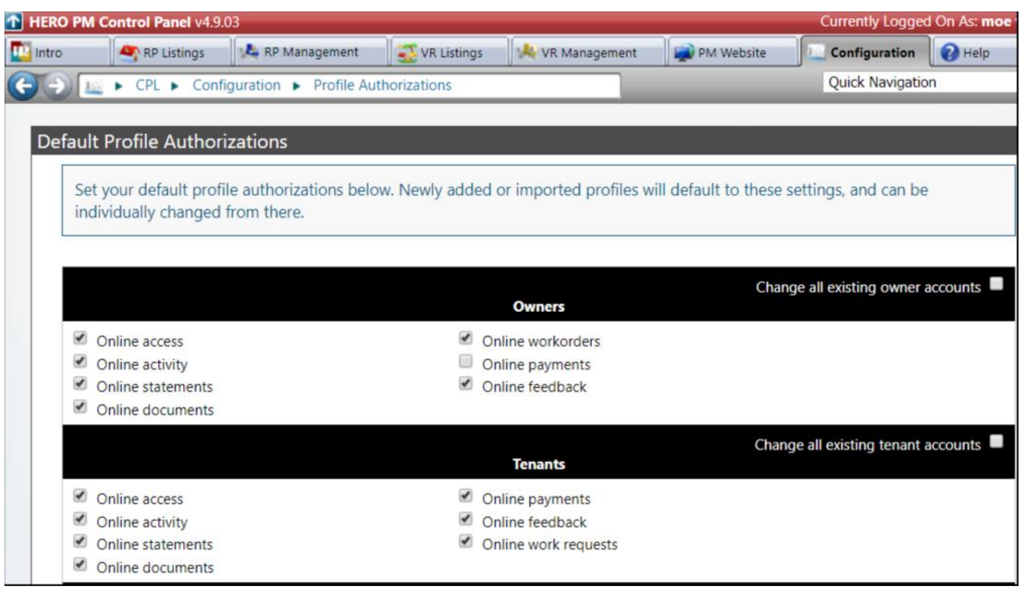


c) On the Configuration tab, in the RP Preferences field there are several things to set up:



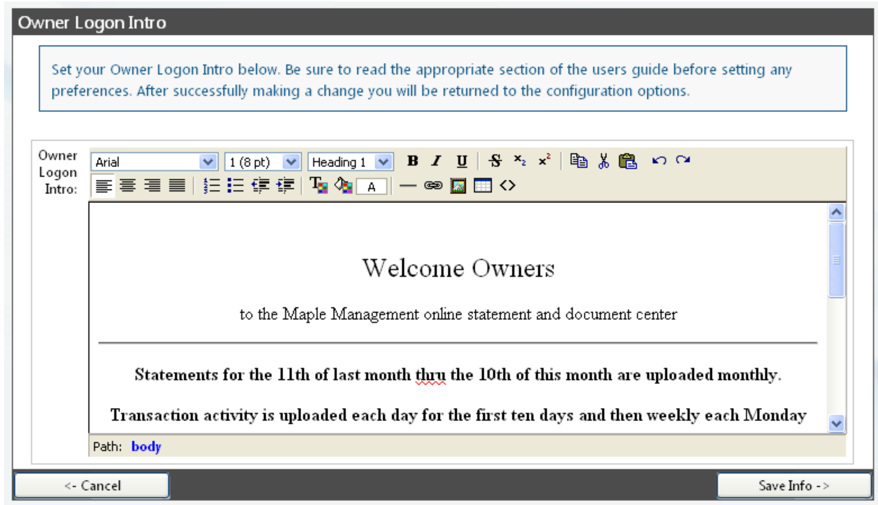


i. Choose "Default Profile Authorizations" in the Client Portal Section near the bottom of the list. Mark the checkboxes for what you want the owners and tenants to have access to. Mark the checkbox on the right "Change all existing owner accounts" or "Change all existing tenant accounts". Click Set Configuration at the bottom right of the screen.



Create an Intro Message for Owners (displays when owner logs on)

- Select Owner Logon Intro in RP Preferences. If your screen doesn't display the editing options, close out and come back in.
- Enter instructions for your owners on how to use the system, updates for your owners, or anything else you want them to know. You can change this whenever you want.



The text of the message should include when statements are published, how often activity is uploaded, whether invoices are uploaded, etc. Something like the below:

Welcome Owners

to the Maple Management online statement and document center

Statements for the 11th of last month thru the 10th of this month are uploaded monthly.

Transaction activity is uploaded each day for the first ten days and then weekly each Monday

If you have any questions after reviewing your statement please email to support@promas.com

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* This online system allows you to access your statements, copies of invoices and other related documents

* Use the tabs above to see your Statements, Documents and Activity.

To change your account password or the notification options use the tabs above.

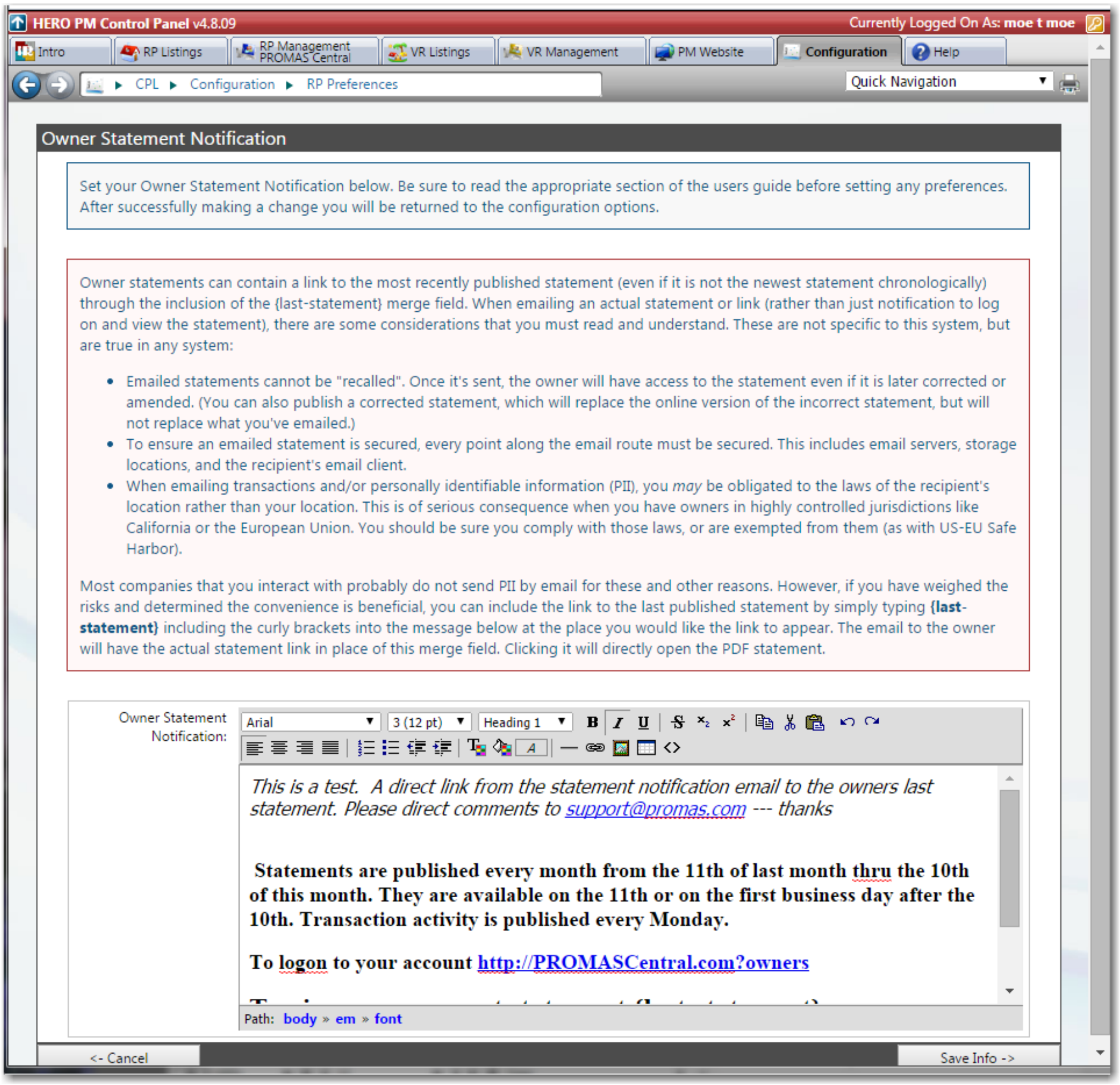
If you have any questions after reviewing your statement please email to support@promas.com

Thank you

- Select Tenant Logon Intro in RP Preferences. Follow the instructions above for tenants.

ii. Set Statement Notification Message

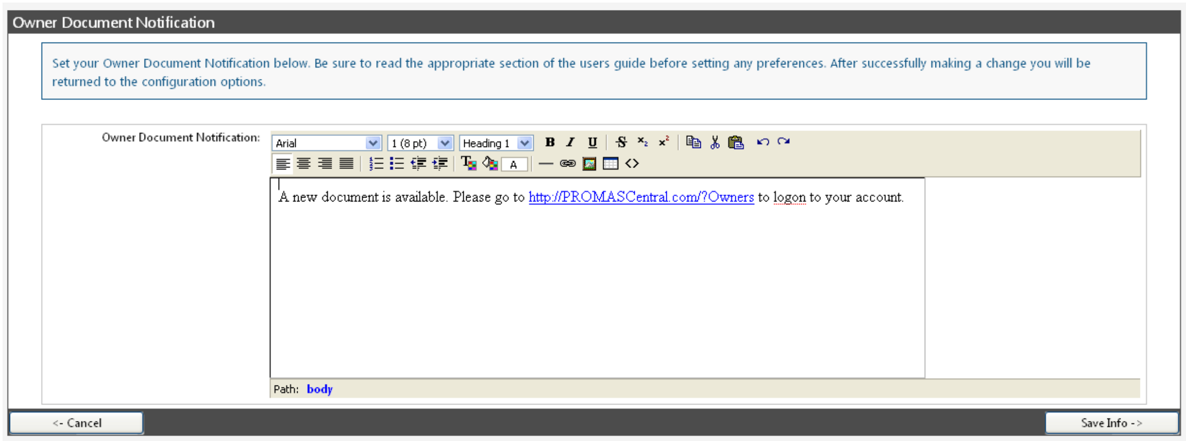
- Select Owner Statement notification in RP Preferences.
- Enter the information you want owners to receive if they elect notification on uploaded statements. This should include a link to your website so they can get to their account logon page.
- To provide a link to the current statement include {last-statement} in the body of the notification.



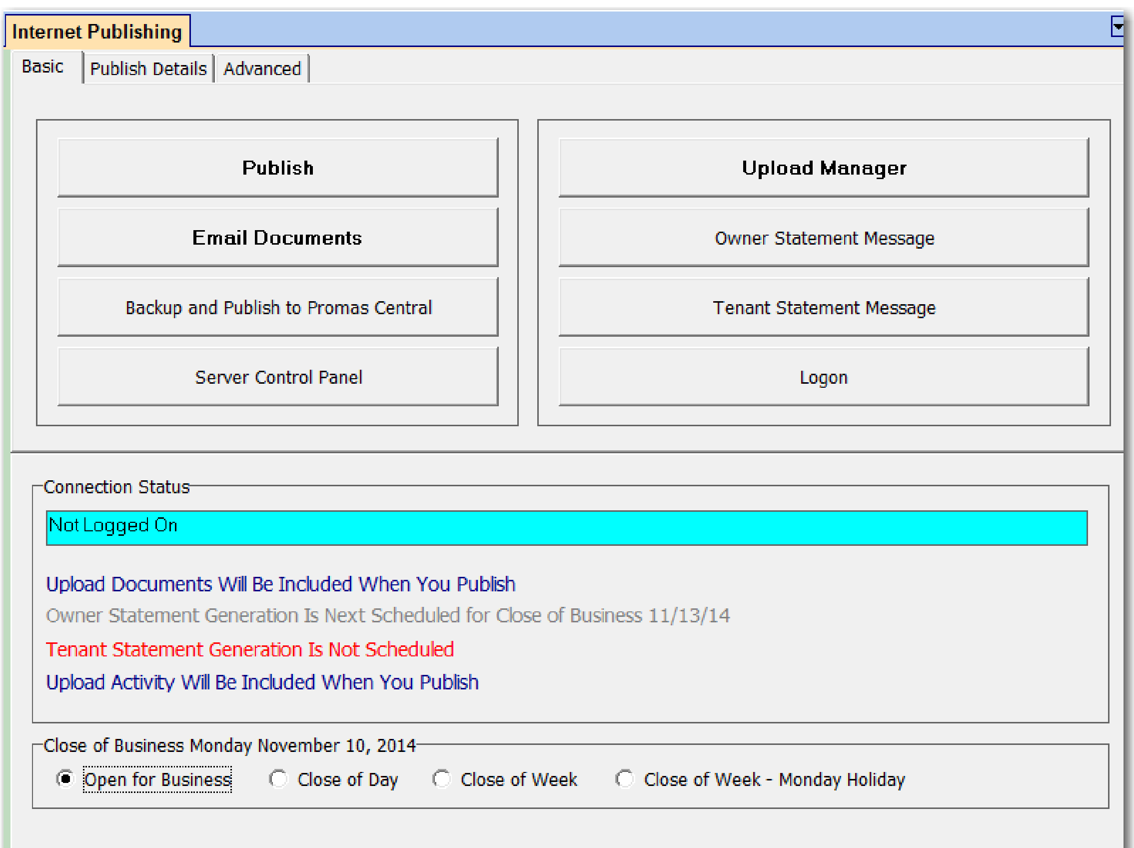
- You can do the same for tenants if you will be uploading tenant information.

iii. Set Document Notification Message

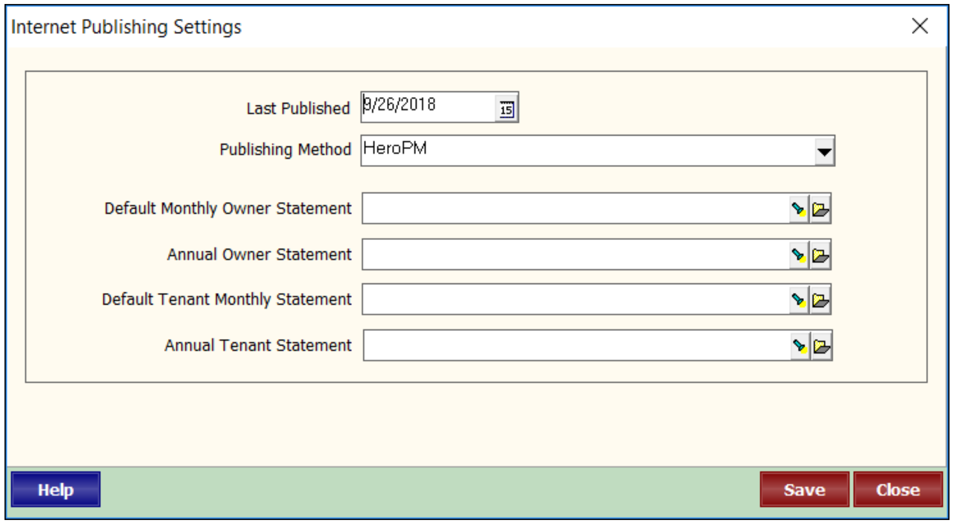
- Select Owner Document Notification in RP Preferences
- Enter the information you want owners to receive if they elect notification on uploaded documents. This should include a link to their account logon page.



5. **Set the upload parameters in PROMAS**. Go to Internet Publishing by clicking the button on the Main Taskbar. or by clicking Mailings, Internet Publishing.



A. Click on Advanced Tab, Publishing Setup



   a. 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.)
   b. Publishing Method – see below
   c. Default Monthly Owner Statement -- 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.
   d. 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.
   e. Default Tenant Monthly Statement – Tenants will get the statement identified in their profile. If you have not assigned tenant's a statement style, you can select a statement style here that will be used for all tenants.
   f. Click Save.

Publishing Method

Documents that are put into the Upload folder will either be published to PROMAS Central, emailed, or both. It depends on two factors:

- how the Publishing Method field in the profile is set
- what Publishing Method is chosen in Internet Publishing, Publishing Setup

<u>HeroPM and HeroPM Legacy</u>

If Publishing Method in the profile is set to default:

- Owners and tenants - publish
- Vendors - publish and email
- Managers - email

If Publishing Method in profile is not set to default:

- Owners and tenants - based on profile
- Vendors - based on profile
- Managers - email

Direct Email

If Publishing Method in profile is set to default:

- Owners and tenants - email
- Vendors - email
- Managers - email

If Publishing Method in profile is not set to default:

- Owners and tenants - email
- Vendors - email
- Managers - email

HeroPM with Email Copy

If Publishing Method in profile is set to default:

- Owners and tenants - publish and email
- Vendors - publish and email
- Managers - email

If Publishing Method in profile is not set to default:

- Owners and tenants - based on profile
- Vendors - based on profile
- Managers - email

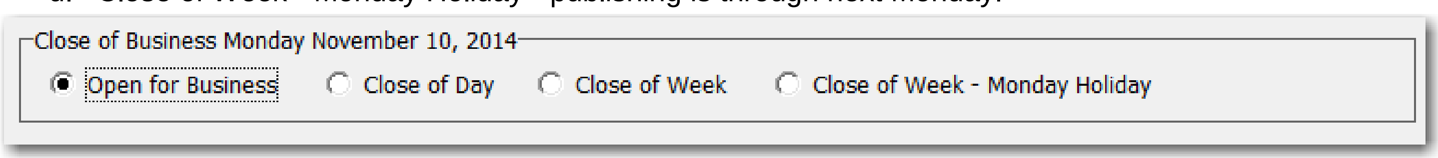
B. End of Business Section

a. Open for Business - publishing is through yesterday.

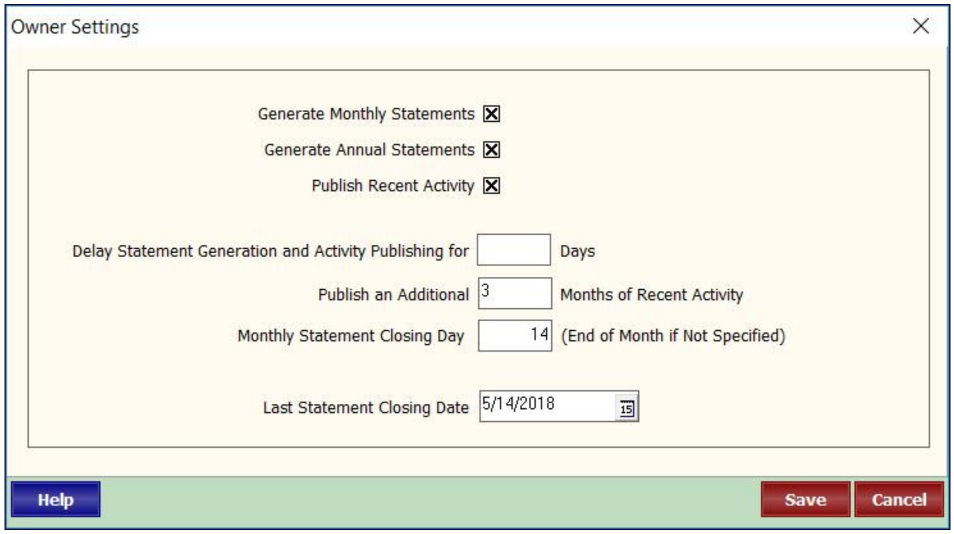
b. Close of Day - publishing through today. If tomorrow is your normal publishing date, you can initiate tomorrow's actions today.

c. Close of Week - publishing is through Sunday.

d. Close of Week - Monday Holiday - publishing is through next Monday.

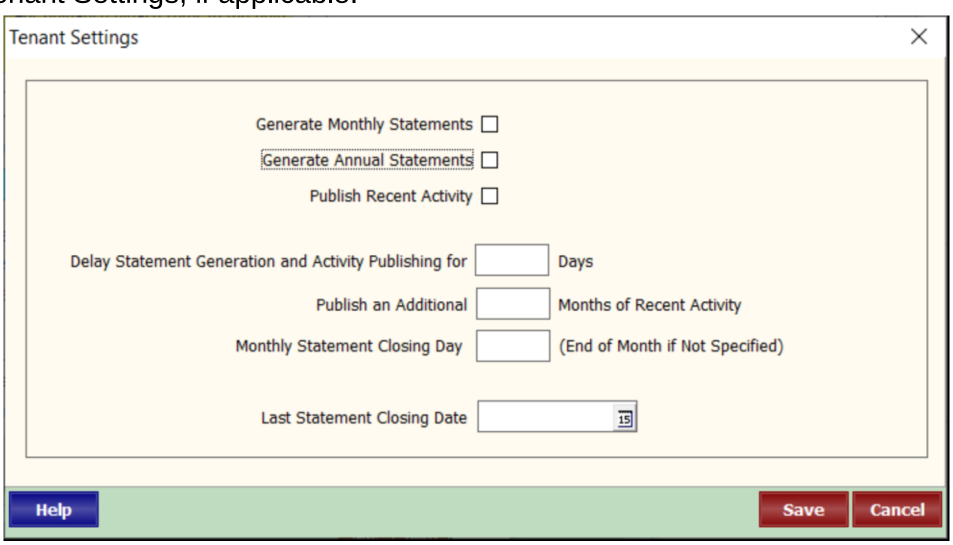


C. Click on Owner Settings



   a. Generate Monthly Statements / Annual Statements / Publish Recent Activity -- The checkboxes, when marked, indicate what statements and activity will be generated when appropriate.
   b. Delay Statement Generation and Activity Publishing for ___ Days -- If a number is entered in the box, the statement and activity will not include transactions for those days. A 3 day delay would mean that activity published on the 10th would not include transactions for the 7th, 8th or 9th. Statements scheduled through the 15th would not be generated until the 19th.
   c. Publish an Additional ___ Months of Recent Activity -- When left blank (the default) published activity will go back to the Last Statement Closing Date. If additional months are selected, activity may include transactions prior to the last published statement. Activity, when uploaded, replaces the activity previously uploaded. Recommend 3 months.
   d. 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.
   e. Last Statement Closing Date -- This is updated each time statements are published. If you need to republish use the Regenerate Owner Statements button. For the first time publishing, enter the date from which you want to publish. Example: if this is April and you want to publish starting with the February statement, and you publish the 13th through the 12th, then set the date to January 12, 2018.

Do the same for Tenant Settings, if applicable.



Publish - Each Time

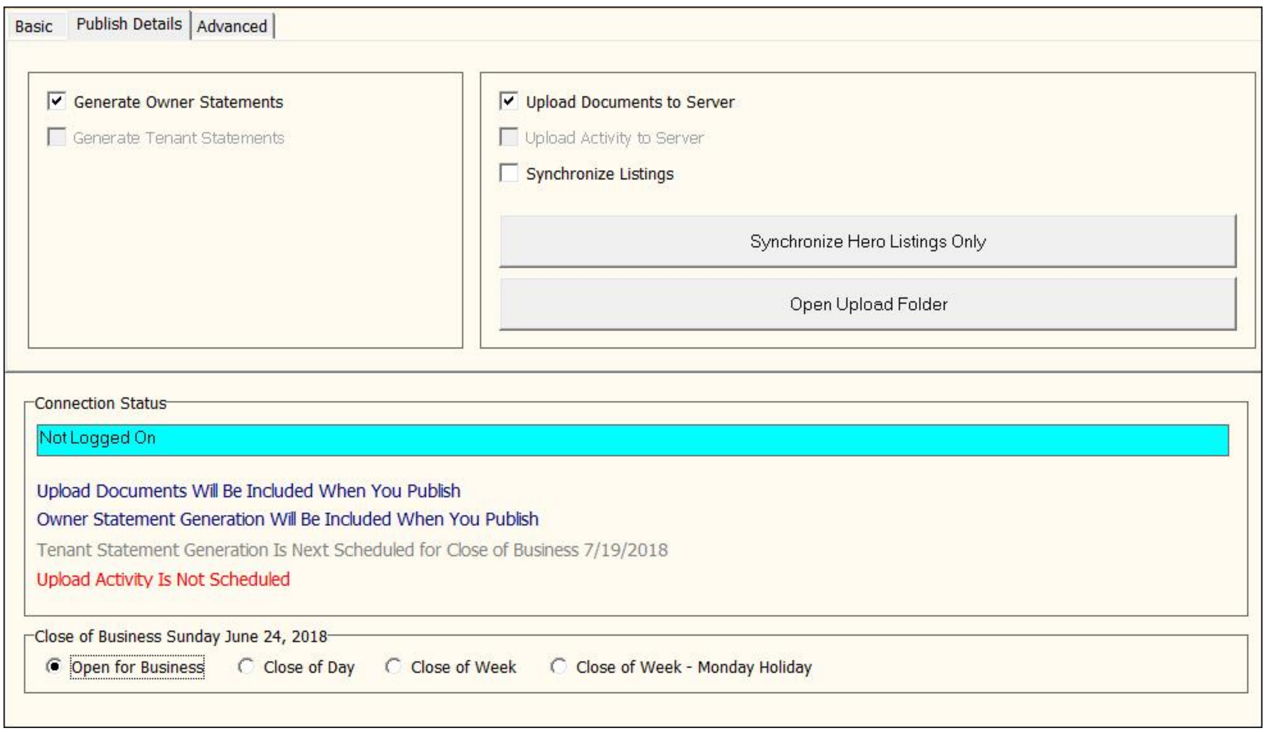
Upload statements, activity and documents.

Once you set the Publishing Setup, Owner Settings and Tenant Settings they should not need to be changed. Their contents determine the schedule for publishing and, when appropriate, the Generate Statements and Upload Activity and Documents checkboxes are activated. The norm is that every day the Upload checkboxes are activated and then deactivated when publishing occurs. The Generate Statements checkboxes are activated on the day statements are scheduled to be published and deactivated after publishing has occurred.

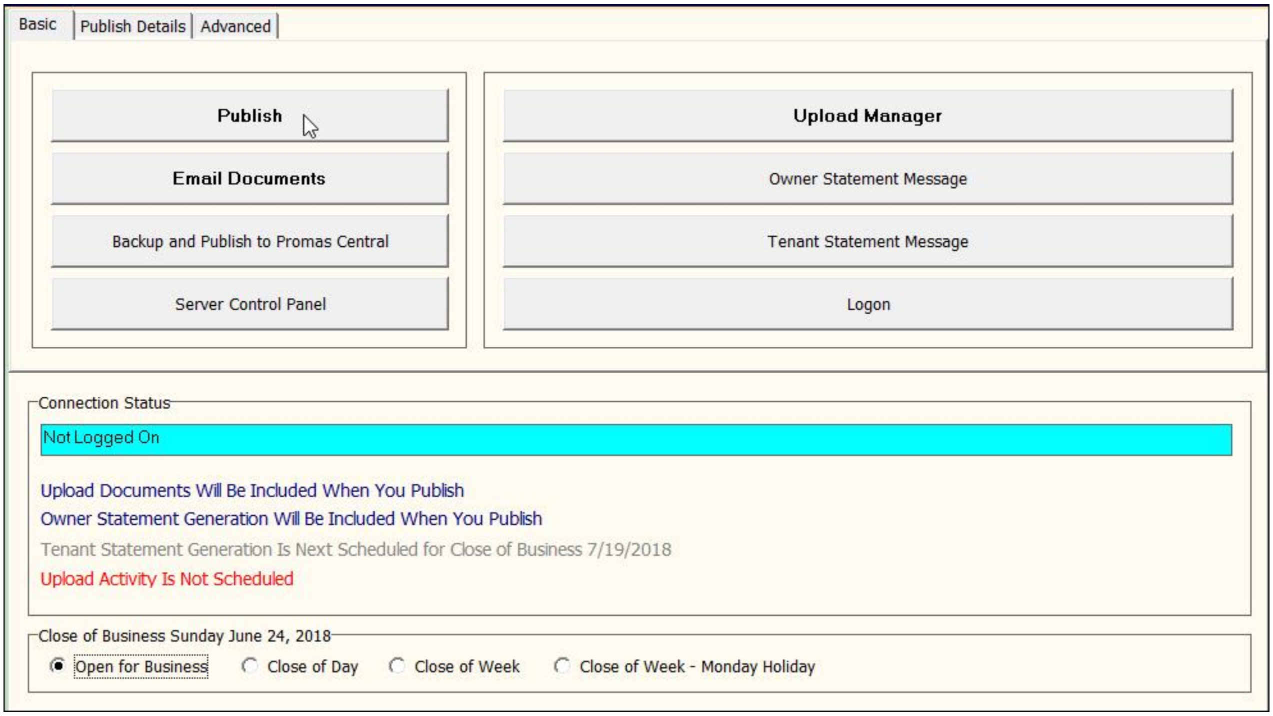
If you don't want to publish everything you can unmark any of the checkboxes on the Publish Details tab. If you unmark Upload Documents, the statements that are generated are placed into the Upload folder waiting to be uploaded.

<u>To Publish:</u>

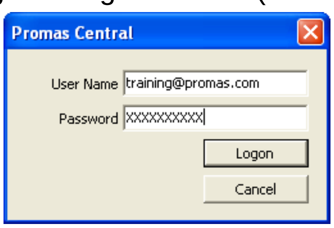
1. On the Publish Details tab, verify the appropriate checkboxes are marked.



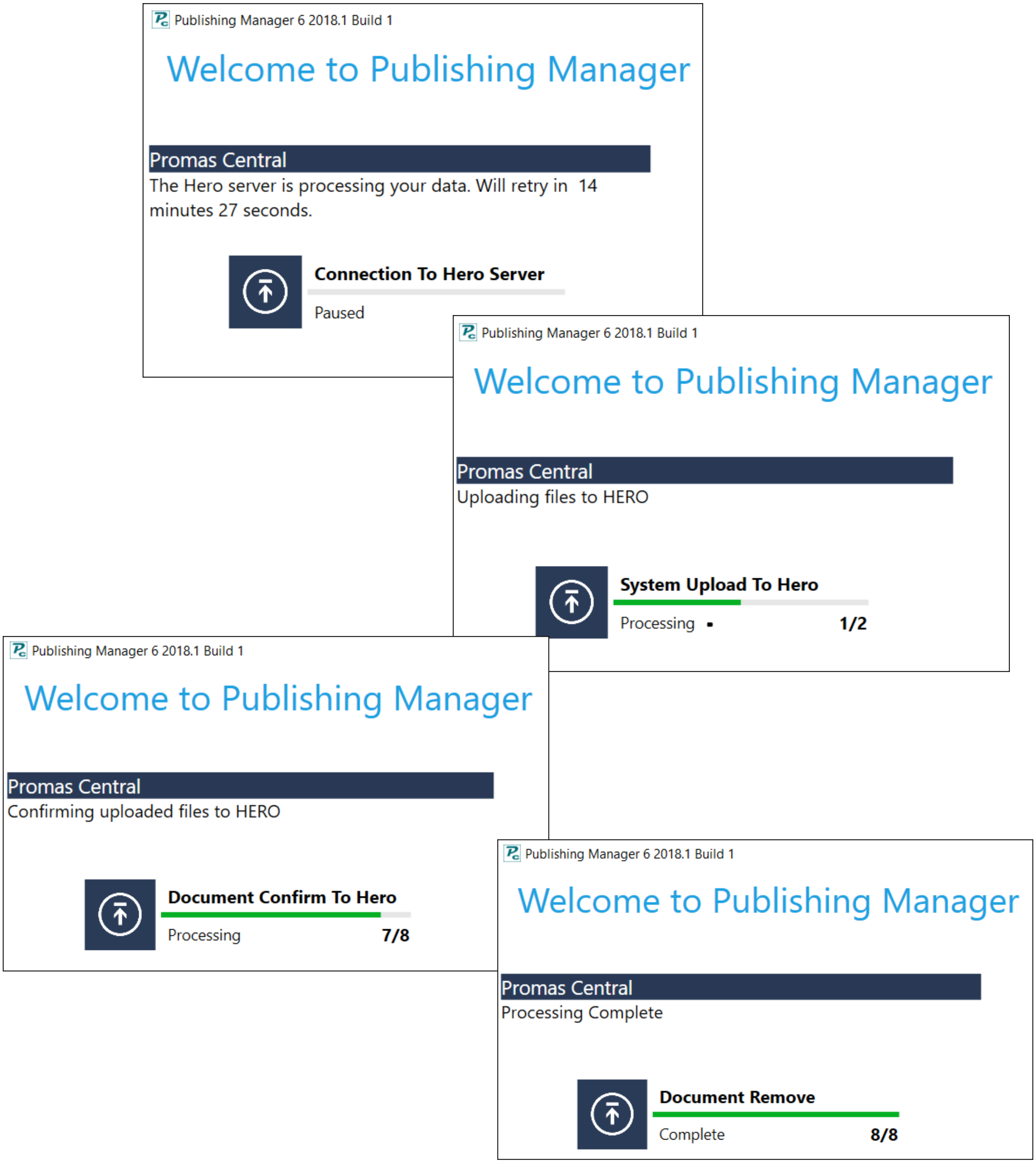
2. On the Basic tab, click on the Publish button.



3. Logon using a User ID (not the PMID).



4. After Logon, statements are generated, the database sync file is created and the activity is generated. Each of the files is put into the Upload folder.
5. If you receive an error message, see page 2. Publish again.
6. When finished, the Transfer screen displays and proceeds based on the checkboxes marked.
7. When the process finishes review any failed uploads by clicking the Error Log.



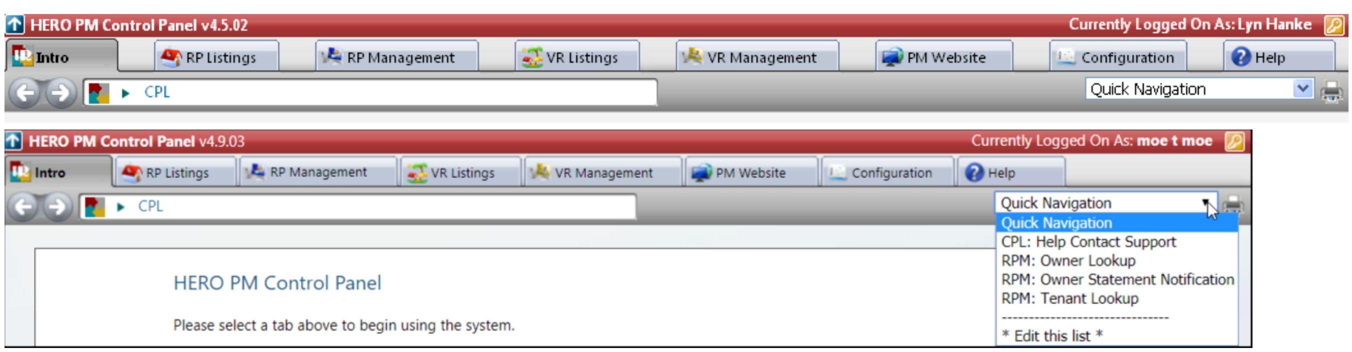
The upload process uploads twice. It works as follows:

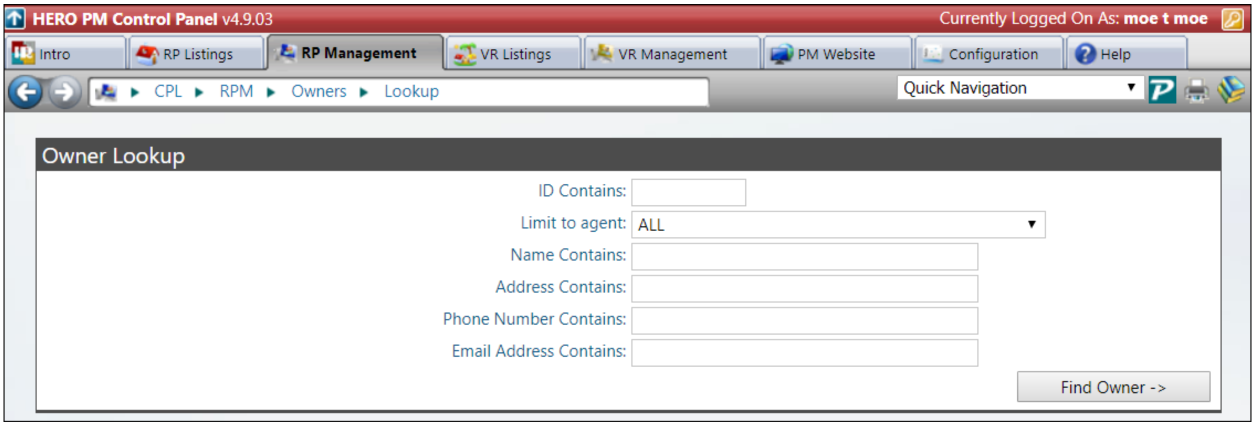
- New owners:
    - 1st pass - database is synced, documents fail
    - 2nd pass - upload as successful transfers
    - Next time an upload is done - upload as confirmed transfers, documents removed from Upload folder
- Established owners
    - 1st pass - upload as successful transfers
    - 2nd pass - upload as confirmed transfers, documents removed from Upload folder
    - Information about each upload is kept in the Log folder inside the Upload folder for your database.
    - Upon receipt the uploaded statements, documents and activity are linked to the appropriate account and will be available for owner viewing.
    - On the evening of an upload the owner will be sent an email (assuming they opted to do so) notifying them of a new statement and documents.

Seeing what the owner sees

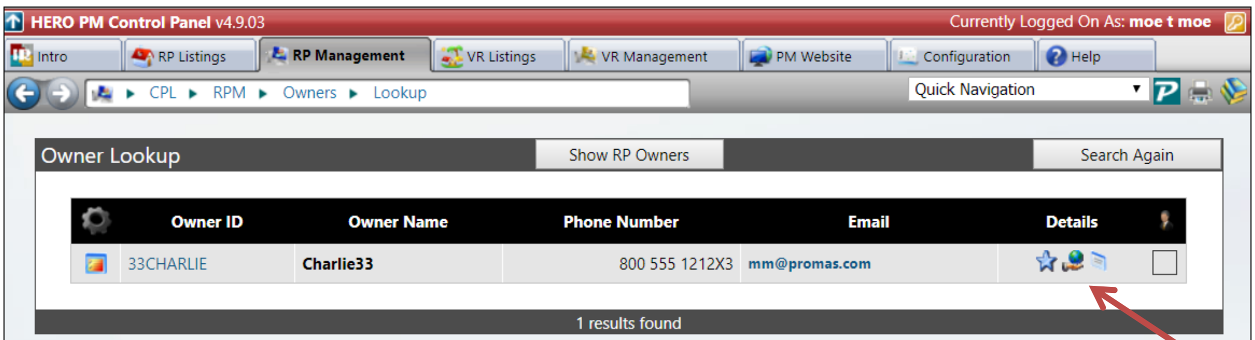
You can view the owner information - statements, documents and activity - whenever necessary - even at the same time as the owner.

1. Go to Links, HeroPM Control Panel Login.
2. Enter your User Name (not the PMID) and password. Click OK.
3. Click the Quick Navigation dropdown and choose RPM-Owner Lookup.
   NOTE: If quick navigation is not set, you can either edit the list and mark the RPM owner lookup so it appears on the dropdown or you can click the RP Management tab, Owners, Owner Lookup.





4. Enter parameters to select the owner and then click the Find Owner button.
5. Click "Show All Owners".



6. Click on the Details, Owner Access Icon (hand with ball).
7. You now have access to all owner tabs except for Change Passwords and Options.
8. Click the Log Off tab when finished.

Seeing what the tenant sees

You can view the tenant information - statements, documents and activity - whenever necessary - even at the same time as the tenant.

1. Go to Links, HeroPM Control Panel Login.
2. Enter your User Name (not the PMID) and password. Click OK.
3. Click the Quick Navigation dropdown and choose RPM-Tenant Lookup.
   NOTE: If quick navigation is not set, you can either edit the list and mark the RPM owner lookup so it appears on the dropdown or you can click the RP Management tab, Owners, Owner Lookup.

Then follow the above steps to choose a tenant to view.

Get your owners/tenants set up

To get themselves set up on HeroPM, there are two steps owners must take. (See our How To document for owners #367).

1. They must log on to HeroPM (either through HeroPM directly or a link from your website). There they will enter an email and password.
2. That will initiate an email to them with a link to click on to finish the setup process. They will need to enter additional information at that point, giving them access to statements, documents and activity.

There are several ways to give your owners/tenants this information.

- You can send a letter, created in PROMAS - this can include the information necessary for Step 2, except for the link that comes in the email.
- You can send a mass email from HeroPM. Once they indicate their interest, send the second email with information they need.
- Send an individual email from HeroPM. Once they indicate their interest, send the second email with information they need.

Whichever method you choose the information should include something like the below:

Setting up an account is a one-time two step process. The first step is to setup your logon Email address and Password, and the second is to establish the link to your online account information. Once that is done you can log on anytime and see your account activity, statements, documents and much more.

This may seem like a lot of steps, but it is to ensure the privacy of your information.

Step 1: Set up your system logon.
* Go to www. PROMASCentral.com
* Click on Owner / Investor.
* Click Create Account.
* Enter the Email address where you want the verificati! on sent.
* Enter and verify a Password.
* Click the I Agree radio button.
* Click Proceed.
* You will be sent an email with a link to use for Step 2.

Step 2: Link to your managed property account.
* Click on the Link in the email to get the Account Verified screen.
* Click on Logon now
* Logon using the email address and password used in Step 1.
* Click Add.
* Enter your property manager ID of : supplied separately
* Enter your Client ID of supplied separately
* Enter your verification code of : supplied separately
* Click on Link Accounts

We trust that having ready access to this information will benefit you greatly. If you have any questions, please do not hesitate to contact us.

Below is a sample letter or email to send to your owners to introduce them to the idea of online statements and help set the stage. Once they have agreed to the idea, you are ready to begin Method 1 or Method 2 (which follow) to give them the information necessary to create an account. You can also send them the How To #367 for step-by-step instructions.

Your Company OWNER Website Portal

Many of you have been requesting more online and we have been listening. ***Your Company*** is pleased to announce that we are now offering online electronic statements and documents. We now have our secure online OWNER PORTAL through our website at ***www.yourcompany.com*** where you will have the ability to view, print and download your monthly statements, leases, insurance documents, annual inspections, pictures, and more. It has the ability to store your statements and documents. And best of all, there are NO additional paper statements. In anticipation of you "Going Green" we have already uploaded your ***XXX – YYY*** monthly statements. If we currently have your email, we will be sending you an email with the next week with instructions on how you can set up your account on our website. If you are not sure if we have your email, please send us an email at ***notice@yourcompany.com*** and we will be sure to set you up so that you can log in.

Your Company will also be making a change in our monthly Owner Statements beginning in ***Month-Year***. We now have the ability to place a note on your statement that gives you the details of exactly what work was performed on a particular invoice. This note will replace the invoice copy (bill) that is presently sent with your paper statement. In order to get you used to the change, we will have both the notes and the bills includes in your statements from ***XXX – YYY***. Starting in ***ZZZ*** we will no longer provide the actual invoice copy with your statement. Rest assured, should you ever need a copy for a particular reason, we will retain electronic copies for at least 5 years. You will continue to receive other documents such as leases, insurance declarations, etc. as needed. All of these documents (not the invoices) will also be uploaded to the secure owner portal on our website.

Our desire is that you elect to receive your statements and all these documents electronically through our website Owner Portal and stop receiving the paper statements. If this is your desire, please send an email to ***notice@yourcompany.com*** and we'll stop the paper statements. Of course, all comments and suggestions are appreciated.

Method 1 - A letter from PROMAS - Mailings, Edit Letters.

This requires only one step because the letter will include all the information they will need for Step 2 after receiving the email with the link. This letter can be created in Mailings, Edit Letters and printed from Mailings, Owner Letters.

This letter contains the information you need to set up your account on PROMAS Central to access your owner statements, documents and activity. If more than one email address is included in the Verification Code below, please use only the first email address.

STEP 1
* Go to www.PROMASCentral.com
* Click on Owner / Investor.
* Click Create Account.
* Enter the Email address where you want the verification sent.
* Enter and verify a Password.
* Click the I Agree radio button.
* Click Proceed.
* You will be sent an email with a link to use for Step 2.

STEP 2: Link to your managed property account.
* Click on the Link in the email to get the Account Verified screen.
* Click on Logon now
* Logon using the email address and password used in Step 1.
* Click Add.
* Enter your Property Manager ID of : 123456VA
* Enter your Client ID of {Ledger.ID}
* Enter your Verification Code of : {Majority.Email}
* Click on Link Accounts

We trust that having ready access to this information will benefit you greatly. If you have any questions, please do not hesitate to contact us.

Best Regards,

Emma Bull
Maple Management
703-555-2287

Letter substitutions in PROMAS

PROMAS Demonstration Package
311D Maple Avenue West
Vienna, VA 22180

This is a letter that can be created in PROMAS to send to all your owners.

Donald S. Schenk
3342 Alligator Walk
Plantation, FL 74390

This letter contains the information you need to set up your account on PROMAS Central to access your owner statements, documents and activity. If more than one email address is included in the Verification Code below, please use only the first email address.

STEP 1
* Go to www. PROMASCentral.com
* Click on Owner / Investor.
* Click Create Account.
* Enter the Email address where you want the verification sent.
* Enter and verify a Password.
* Click the I Agree radio button.
* Click Proceed.
* You will be sent an email with a link to use for Step 2.

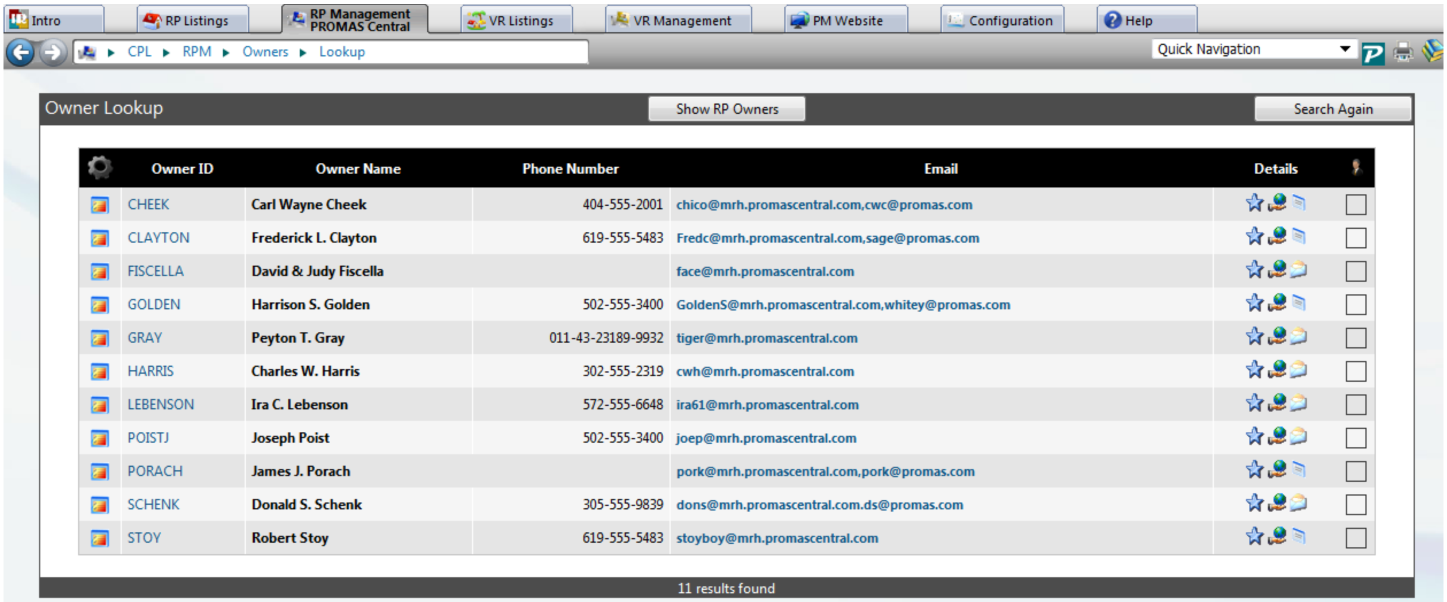
STEP 2: Link to your managed property account.
* Click on the Link in the email to get the Account Verified screen.
* Click on Logon now
* Logon using the email address and password used in Step 1.
* Click Add.
* Enter your Property Manager ID of : 123456VA
* Enter your Client ID of SCHENK
* Enter your Verification Code of : support@promas.com;lyn@promas.com
* Click on Link Accounts

We trust that having ready access to this information will benefit you greatly. If you have any questions, please do not hesitate to contact us.

This is the letter generated by the above through Mailings, Owner Letters. If you have used a semi colon to separate multiple email addresses, the owner will have to enter the verification code using a comma instead of a semi colon.

Method 2 - Email owners/tenants from your email program or from HeroPM or send a general letter attached to statement.

The email or letter you send will have the same format as the letter from PROMAS, but will not include the information for Step 2 (see page 13). Once they indicate their interest, go into the HeroPM control panel, RPManagement tab, Owners (or Tenants). Bring up the list of all owners (tenants) and click on the "Send/Resend Portal Account Linking Message" (envelope with yellow tab under Details) icon for each owner who is interested. They will receive an email with the information they need to create their account, as indicated in Step 2: Link to your managed property account.



The owner (tenant) will receive an email similar to the one below containing the information he needs to follow the instructions in Step 2.

Dear Ira C. Lebenson:

Following is the information you will need to establish the connection to your managed account through our online portal.

Our Property Manager ID: 101123VA
Your Client ID: LEBENSON
Your email address: le@promas.com
Your verification code: le@promas.com

Please log on to our website or contact us if you have any questions or need additional information.