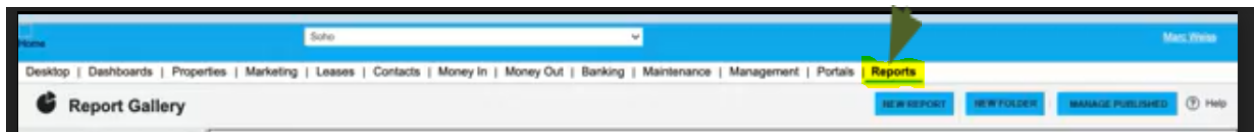


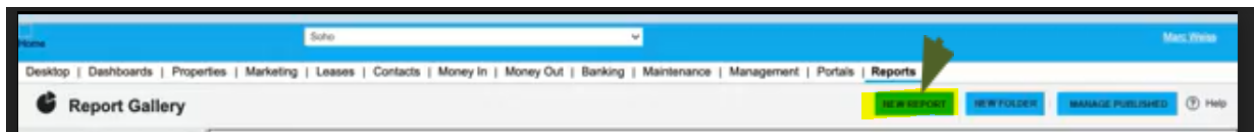


Propertyware One-Way Integration Guide

1. Go to the **Reports** tab in Propertyware



2. Click **New Report**



3. Click **Lease Reports**
4. Select **Tenant Contacts**
5. In the **Name** field, type "PetScreeningData_*CompanyName*_Propertyware"
6. **Apply**

/pw/reporting/reports.do

New Report

Marketing | Le...

Search for

New

New

Cus

Def. corr

Administrative reports

Contact Reports

Desktop Reports

Finance Reports

Financial Statements

Lease Reports

Rent Roll Report - Enhanced

Rent Roll with Unit Information

Tenant Contacts

Units with Leases

Velocity Utility Billing Setup

Maintenance Reports

Marketing Reports

Owner Statements

Property Reports

Description

This report type displays a list of tenant contacts by unit.

Settings

Name

PetScreeningData_CompanyName_Propertyware

Description

This report type displays a list of tenant contacts by unit.

Default Folder

Custom Folder

Select Folder

ACCOUNTING

CORPORATE REPORTS

KPI'S

MANTEL PROPERTIES REPORTS

MONTH END CLOSE

POST IMPLEMENTATIONS

APPLY

CANCEL

Right click on the report name in the list to reveal additional options. The view option will run the report immediately. Detail reports cannot be deleted.

ACCTS. View

ACCTS. Edit

ACCTS. Delete

ACCTS. Export

ACCTS. PAYABLE-UNPAID

VENDOR

BILL PAY

PAST DUE

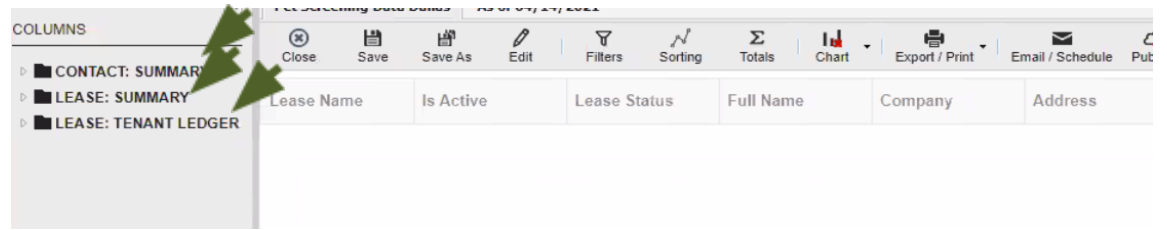
REFUND

Last 10 reports you generated

do#

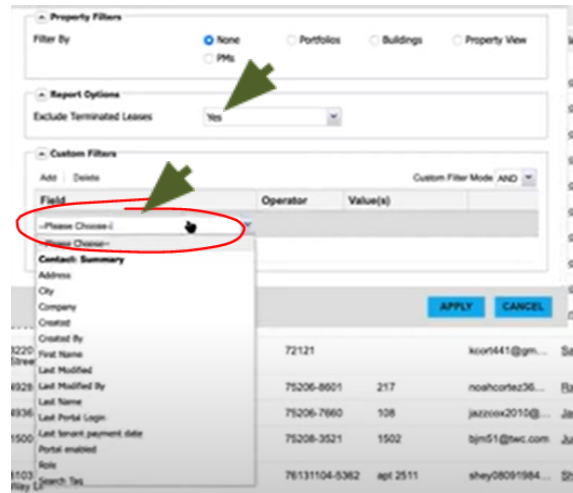
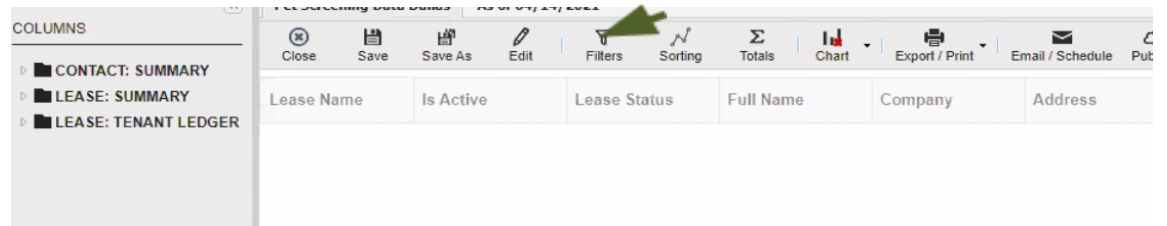
7. Navigate to the toolbar on the left-hand side
8. In the **Columns** section, make the following changes:
 - a. **Contact: Summary**
 - i. Remove
 1. Company
 2. Full Name
 - ii. Add
 1. Address Cont.
 2. Email
 3. First Name
 4. Last Name
 - b. **Lease: Summary**
 - i. Remove
 1. Lease Name
 - ii. Add
 1. End Date
 2. Start Date
 - c. **Lease: Tenant Ledger**

i. Deselect both fields



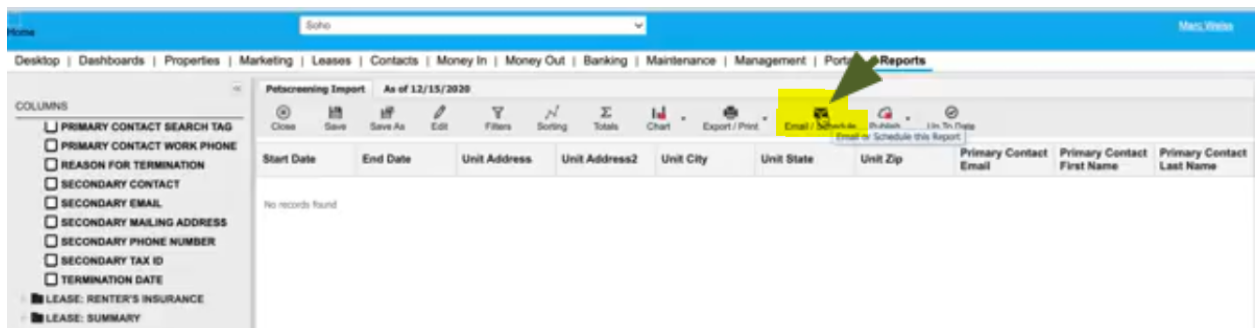
9. Click **Filters**

- Ensure **Exclude Terminated Leases** is marked **Yes**
- Add the following filters:
 - Field: **Is Active** -> Operator: **equals** -> Value: **Yes**
 - Field: **Status** -> Operator: **equals** -> Value: **Active**



c. Click **Apply**

10. Click **Email/Schedule**



11. Click the **Send Later** tab

12. Select **Scheduled**

13. In the modal, fill in the following fields:

- a. Start Sending: **[tomorrow's date]**
- b. Frequency: **1 day(s)**
- c. From: **[any email]**
- d. Format: **Excel**
- e. Send To: _____@units.petscreening.com,
flatfile@petscreening.com
 - i. This is a unique integration email address for PetScreening integrations.
 - ii. Your Onboarding rep at PetScreening will send this to you. Please reach out to them if you do not have this yet.
- f. Message: **PetScreeningData_CompanyName_Propertyware**

14. Click Save

The screenshot shows the 'Email / Schedule' dialog box. At the top, there are tabs for 'Send Now' and 'Send Later'. Below these are two radio buttons: 'Not Scheduled' and 'Scheduled'. The 'Scheduled' button is highlighted with a yellow box and a green arrow. Under the 'Settings' section, there are three fields: 'Start Sending' (with a date picker), 'Frequency' (set to '1 day(s)'), and 'From' (with a dropdown menu). The 'Format' section shows 'Excel' selected with a radio button. The 'Send To' section has three radio buttons: 'Specified Recipients' (selected), 'Portfolio Owners', and 'Property Managers'. Below this is a text field containing '____@units.petscreening.com, flatfile@petscreening.com'. A green arrow points to this field. Below the text field is a note: 'Enter the email addresses of recipients, separated by commas. With this option every recipient gets the same copy.' The 'Message' section has a text area with the text 'PetScreeningData_CompanyName_Propertyware'. A green arrow points to this text area. At the bottom right, there are two buttons: 'SAVE' (highlighted with a yellow box and a green arrow) and 'CANCEL'.

15. Done – The integration is complete!

16. Send an email to your PetScreening Onboarding rep stating that the integration is complete. Please include a copy of the report you created in the email.