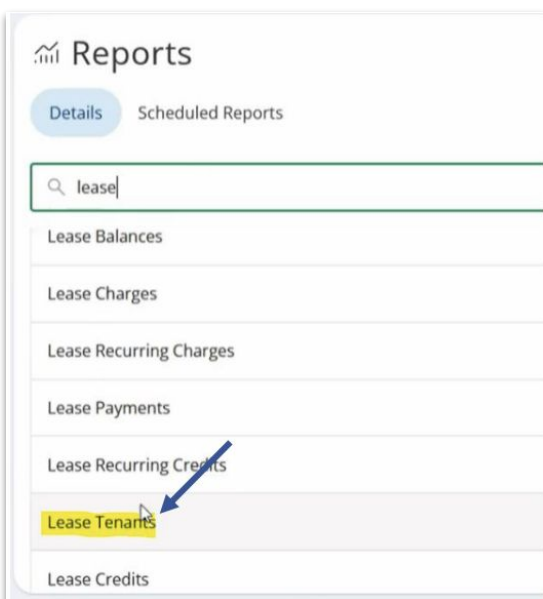


A quick guide to setting up your integration

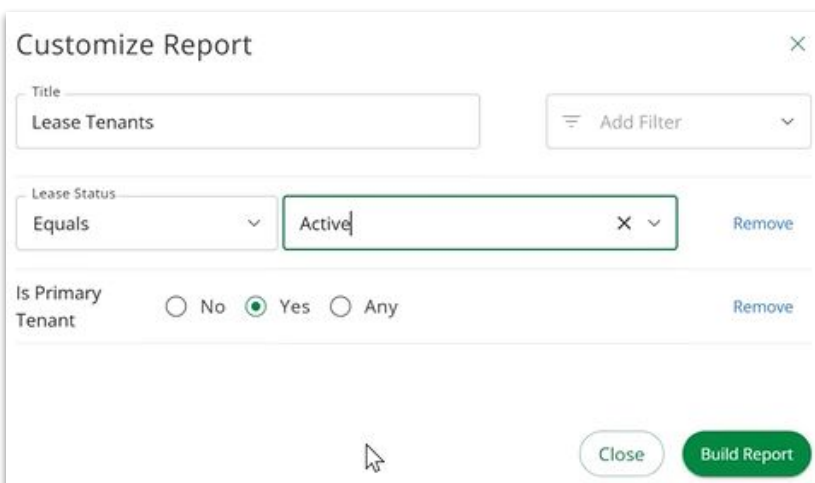
1. Go to the **Reports** tab in Rentvine

 **Reports**

2. Find and select the **Lease Tenants** report



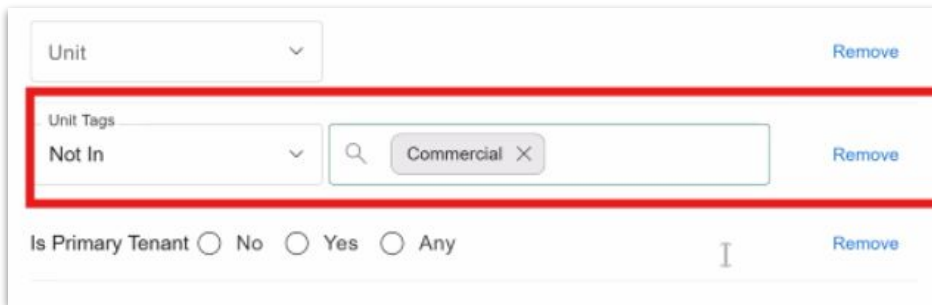
3. Under **Filters**, create the following filters:
 - a. Lease Status Equals Active
 - b. Is Primary Tenant Select Yes



A quick guide to setting up your integration

To exclude commercial residents from importing to PetScreening, you'll need to create a specific tag for commercial properties. You must have Administrator permissions to complete these steps.

1. Create a **Unit Tag**: Search for the commercial property you want to tag. Click the **+** icon at the bottom of the unit to create a new tag. Name it something clear, like "Commercial Unit."
2. **Exclude the Tag**: Select Unit Tags from the filter options. From the dropdown menu, choose '**Not In**' and then enter the tag name you just created (Commercial Unit).



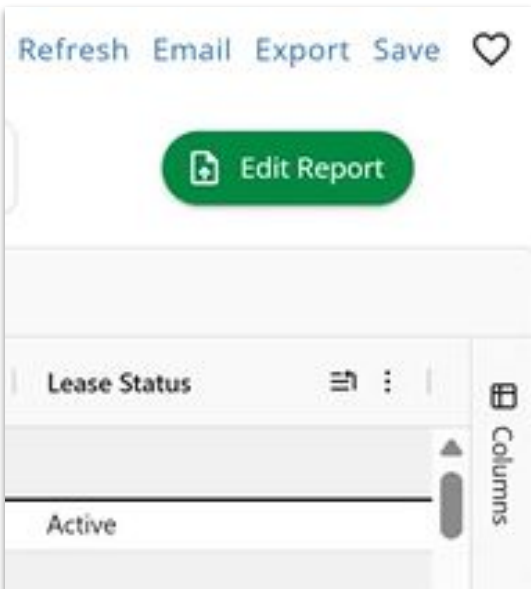
Unit Remove

Unit Tags Remove

Not In Remove

Is Primary Tenant ☐ No ☐ Yes ☐ Any Remove

4. Click on **Columns** on the right-hand side. Uncheck all pre-checked fields.



Refresh Email Export Save 

 Edit Report

Lease Status  

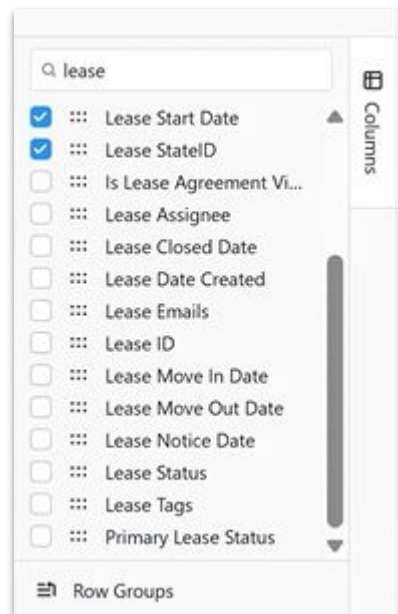
Active

Columns

A quick guide to setting up your integration

5. Under **Columns**, search for the following fields and select the box next to each field.

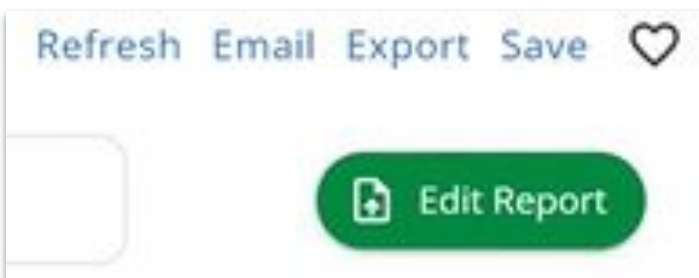
- First Name
- Last Name
- Email
- Lease Address
- Lease Address2
- Lease City
- Lease StateID
- Lease Postal Code
- Lease Start Date
- Lease End Date



6. Under **Row Groups**, click the “x” next to leases to deselect this field.

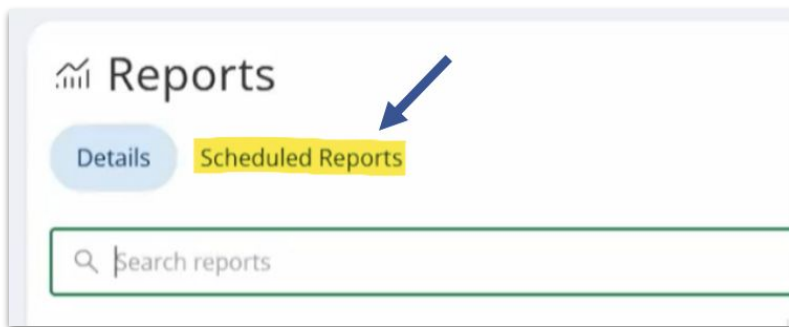


7. Click **save** at the top right-hand corner.



A quick guide to setting up your integration

8. Name the report **PetScreeningData_CompanyName_Rentvine**
9. **Save**
10. Navigate back to the **Reports** tab and select **Scheduled Reports**



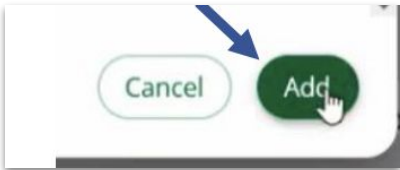
11. Click the **+ New Scheduled Report** button



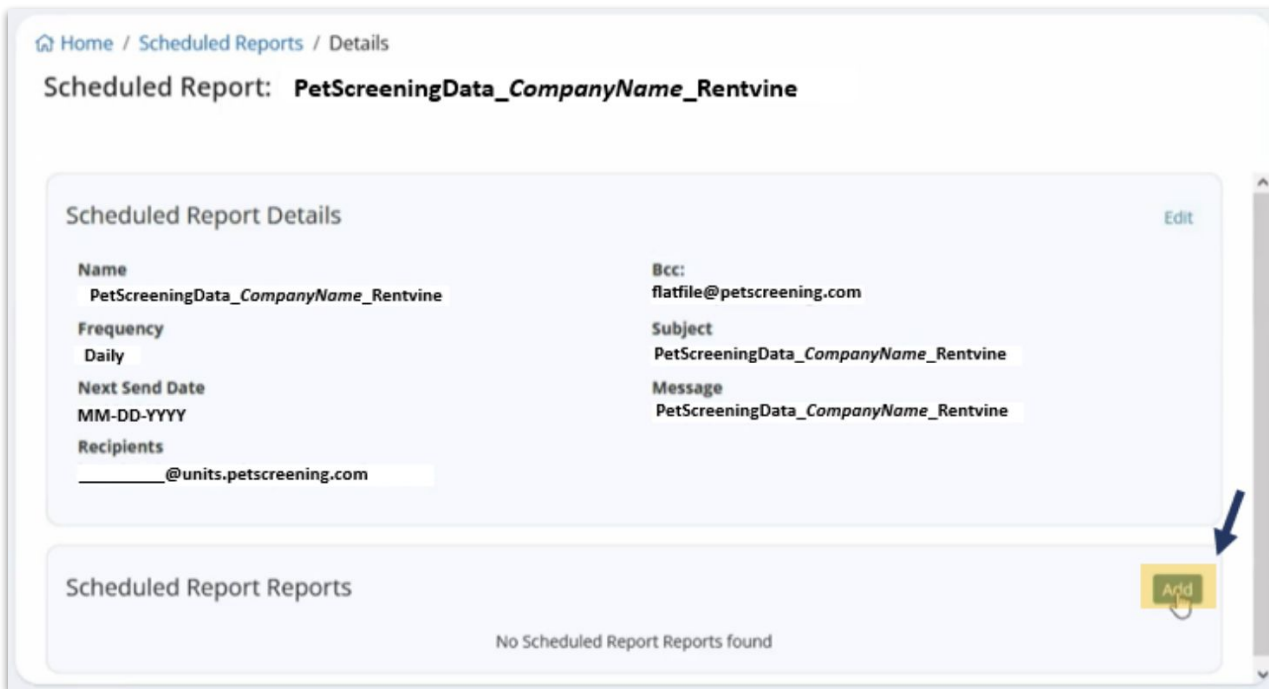
12. In the Add Scheduled Report modal, fill in the following:
 - a. Scheduled Report Name:
PetScreeningData_CompanyName_Rentvine
 - b. Recipients: _____@units.petscreening.com
 - i. This is a unique integration email address for PetScreening integrations.
 - ii. Your Onboarding rep at PetScreening will send this to you. Please reach out to them if you do not have this yet.
 - c. BCC: **flatfile@petscreening.com**
 - d. Subject: **PetScreeningData_CompanyName_Rentvine**
 - e. Message: **PetScreeningData_CompanyName_Rentvine**
 - f. Start Date: **[tomorrow's date]**
 - g. Repeat Every: **1**
 - h. Frequency: **Day**

A quick guide to setting up your integration

13. Click **Add**



14. Click the **Add** button in the **Scheduled Report Reports** section



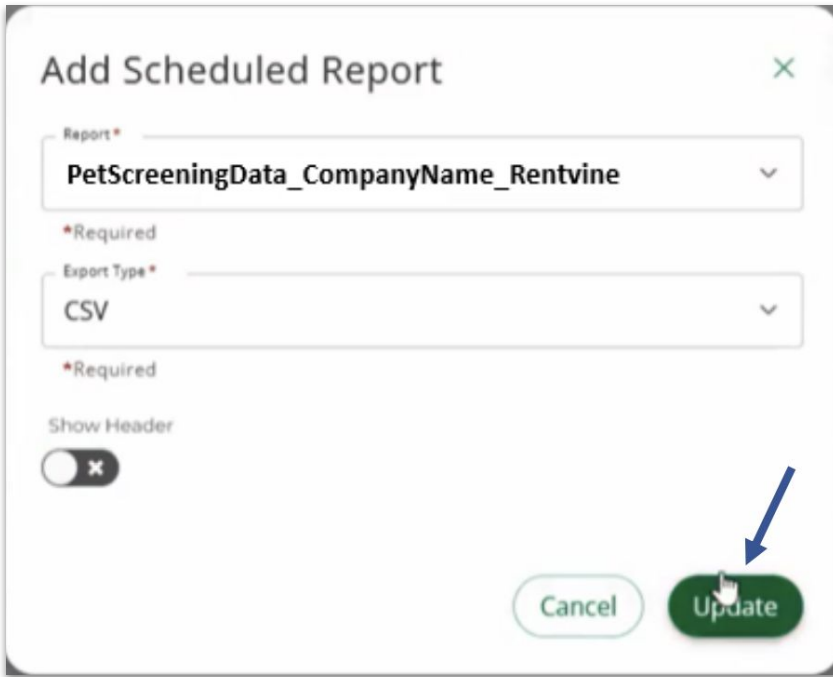
15. Select the Saved Report: **PetScreeningData_CompanyName_Rentvine**

16. Export Type: **CSV**

17. Show Header: **No**

A quick guide to setting up your integration

18. Click **Update**



Add Scheduled Report [X]

Report*

*Required

Export Type*

*Required

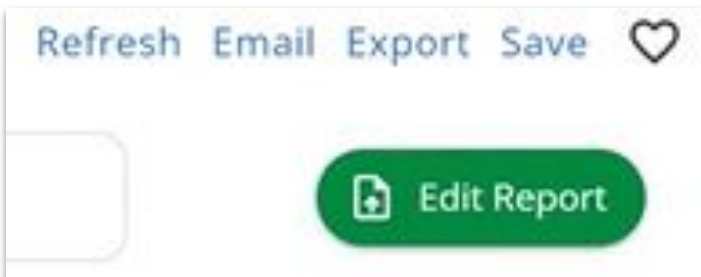
Show Header ☐

A blue arrow points to the **Update** button.

19. Done – The integration is complete!

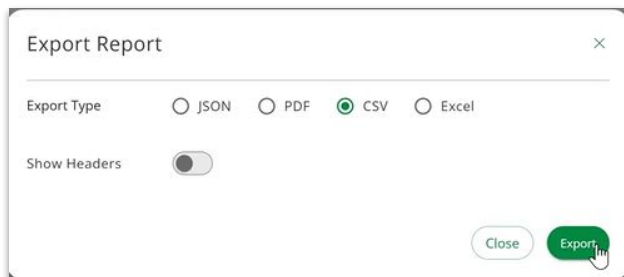
20. Send an email to your PetScreening Onboarding rep stating that the integration is complete. Please include a CSV copy of the report you created in the email.

21. To save the report, navigate to the report and select the export button at the top right. Select the export type as CSV. Deselect the show headers button.



Refresh Email Export Save 

 **Edit Report**



Export Report [X]

Export Type ☐ JSON ☐ PDF ☒ CSV ☐ Excel

Show Headers ☐

A hand cursor points to the **Export** button.