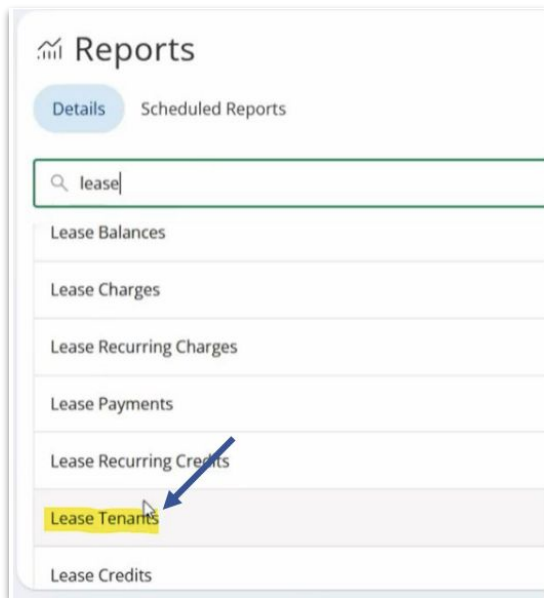
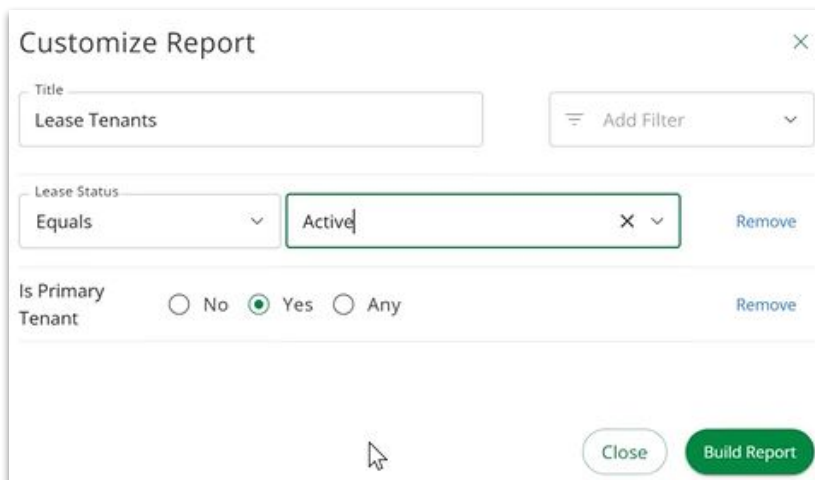


## A quick guide to setting up your integration

1. Go to the **Reports** tab in Rentvine
2. Find and select the **Lease Tenants** report



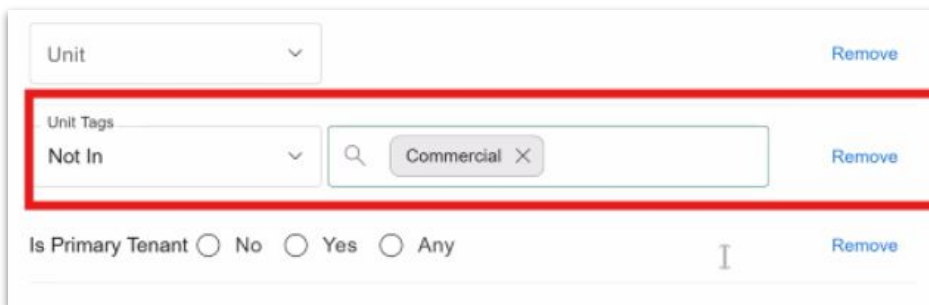
3. Under **Filters**, select three filter categories to match the following screenshot:



## 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).



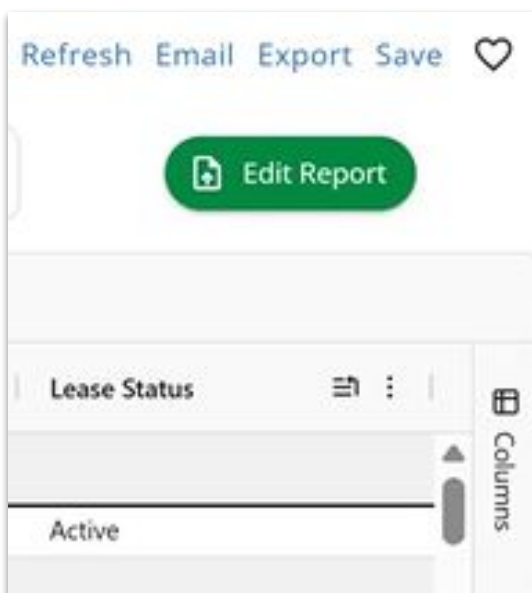
Unit Remove


Unit Tags Remove


Not In  Remove



Is Primary Tenant  No  Yes  Any Remove


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



Refresh Email Export Save 

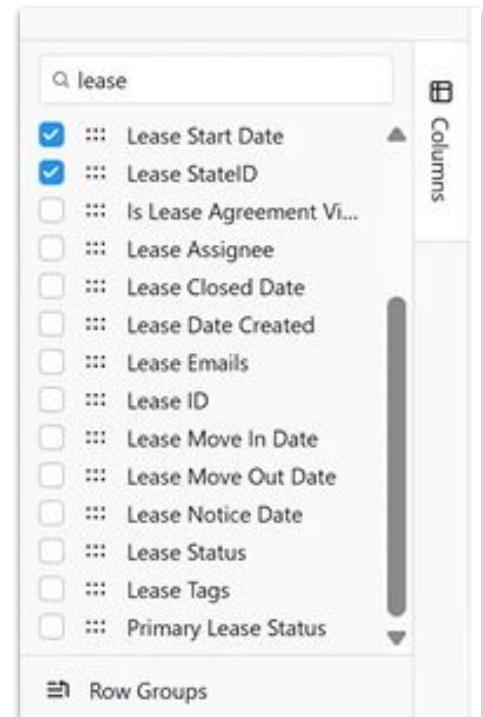
 Edit Report

Lease Status  

Active 

## A quick guide to setting up your integration

4. Under **Columns**, search for the following fields and select the box next to each field.
  - a. First Name
  - b. Last Name
  - c. Email
  - d. Lease Address
  - e. Lease Address2
  - f. Lease City
  - g. Lease StateID
  - h. Lease Postal Code
  - i. Lease Start Date
  - j. Lease End Date
  - k. Lease Move In Date
  - l. Lease Move Out Date



5. Under **Row Groups**, click the "x" next to leases to deselect this field.



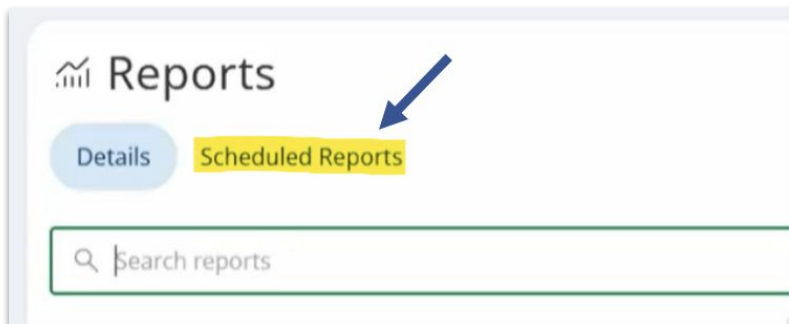
6. Click **save** at the top right-hand corner.



# A quick guide to setting up your integration

Name the report **PetScreeningData\_CompanyName\_Rentvine**  
**Save**

Navigate back to the **Reports** tab and select **Scheduled Reports**



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

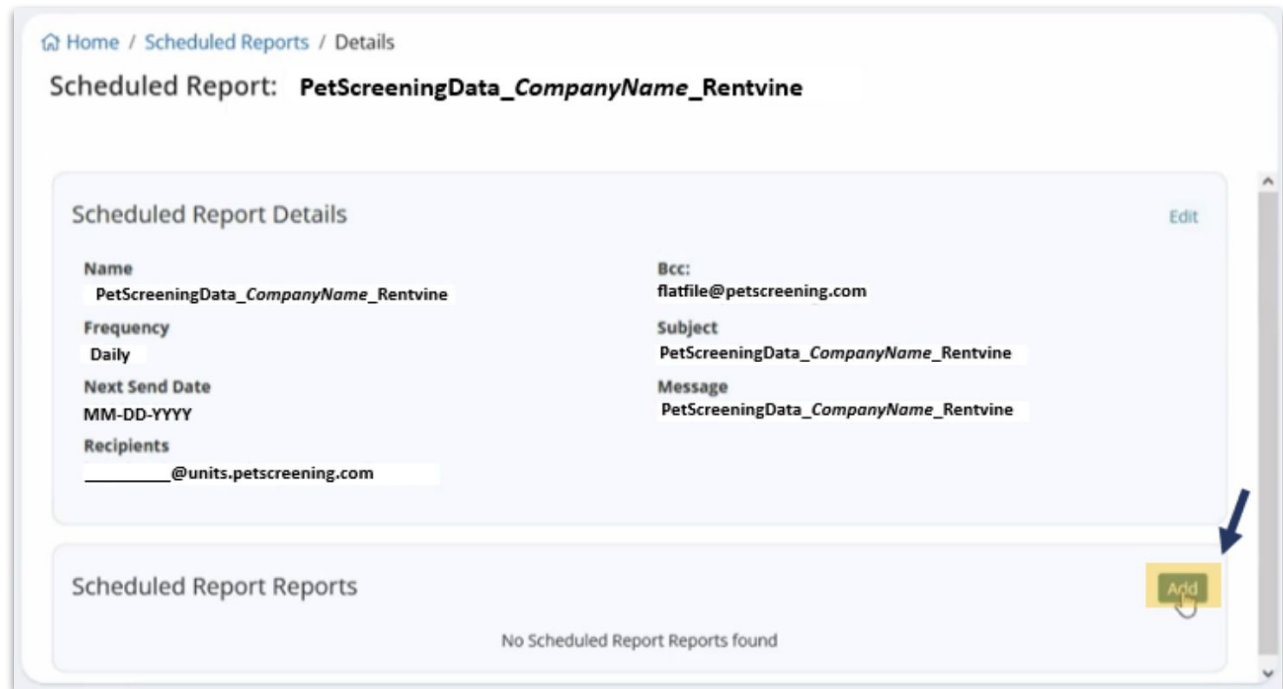


12. In the Add Scheduled Report modal, fill in the following:

- 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

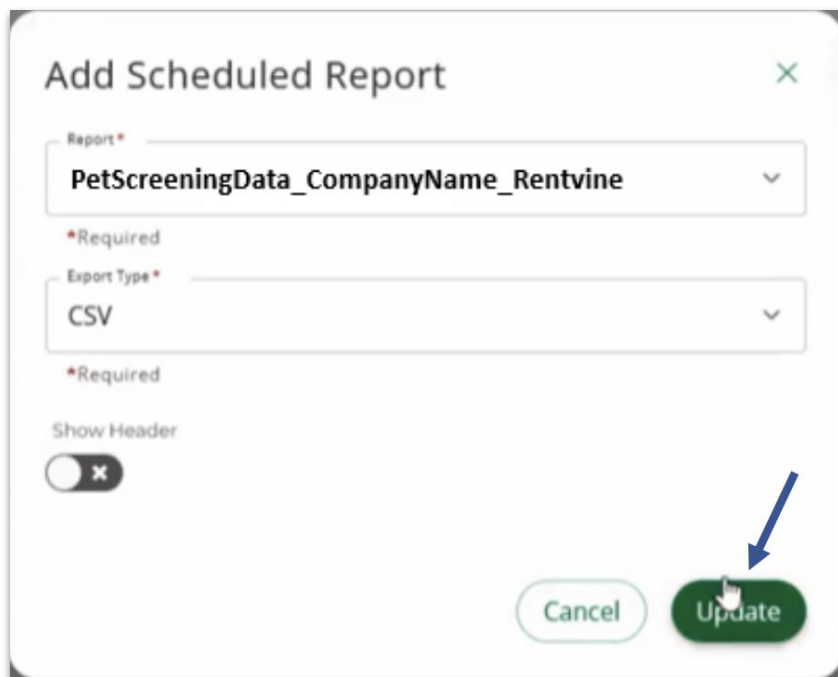
13. Click the **Add** button in the **Scheduled Report Reports** section



14. Select the Saved Report: **PetScreeningData\_CompanyName\_Rentvine**
15. Export Type: **CSV**
16. Show Header: **No**

## A quick guide to setting up your integration

### 17. Click **Update**



**Add Scheduled Report** ×

Report\*

\*Required

Export Type\*

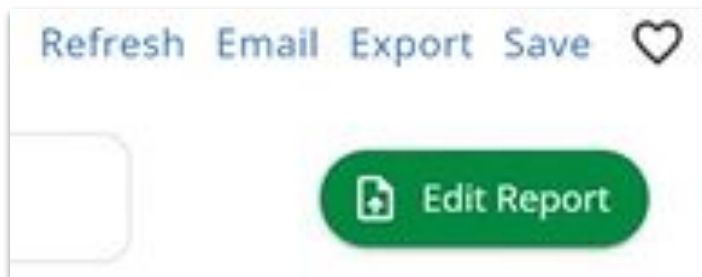
\*Required


Show Header

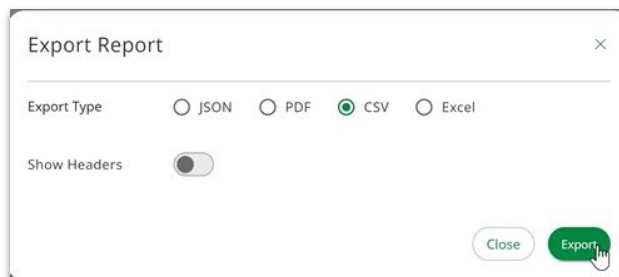
18. Done - The integration is complete!

19. 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.

20. 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 



**Export Report** ×

Export Type  JSON  PDF  CSV  Excel

Show Headers