

## A quick guide to setting up your integration

1. **Contact your Yardi Account Manager** and ask to have the PetScreening vendor add-on package loaded to your interface database

*PetScreening doesn't automatically show in your database of vendor interfaces until ILS Guest Card Plv18, so your Yardi Account Manager will need to add the PetScreening vendor package for you all. Once PetScreening is visible in your database, you can access PetScreening's interface in the ILS Guest Card settings: **Interfaces > Configuration > Review Interface Vendors > ILS Guest Card > PetScreening***

2. **Create a property list named 'PetScreening list'**. Include all properties that will use PetScreening.

3. **Use Bulk Property interface configuration** to add PetScreening to all properties in the PetScreening List.

You can access this function by going to **Interfaces > Configuration > Bulk Property Interface Configuration**. Alternatively, you can manually add PetScreening to all properties: Please review property → Click on Functions → Interface Configuration → ILS Guest Card and make sure PetScreening is selected

4. **If you use an existing ILS Interface security group, verify the security group has the following permissions: (NOTE: You can check the permissions by going to the Administration Menu and clicking on Set Permissions.)**

**Interfaces: Web Service – Common Data** – Read/Write

**Interfaces: Web Service – ILS/Guest Card (Core and Other)** – Read/Write

**Interfaces: Web Service – Resident Data** – Read/Write

**Interfaces: Web Service – Lease Renewal** – Read/Write

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If you do not have an existing ILS Interface security group, add an ILS Guest Card Interface group, and select the menuset RES. You can create a new group by clicking on Add Groups from the Administration menu. After the group is added, please go to Set Permissions, and set all permissions to Most Restrictive. **Lastly, assign the Read/Write permissions similar to the list above.**

### 5. Manually create a Petscreening Agent with the following information.

<b>Code:</b> petscree	<b>Property List:</b> (use property list from Step 2)
<b>Last name:</b> petscreening	<b>Username:</b> petscreening
<b>Group:</b> (select group from Step 4)	<b>Password:</b> (Secure Password)

**Go to Privilege tab > select Interface User**

### 6. Send PetScreening your Yardi credentials. Below is an *example* of what we'll need.

<b>URL:</b> https://www.yardiabc12.com/12345test	<b>Username:</b> petscreening
<b>Server Name:</b> servername_live	<b>Password:</b> (Secure Password)

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PetScreening requires **read or read/write access** to specific data points in Yardi in order to properly receive and process resident, pet, and application information. These permissions are configured in **Yardi Voyager** → **Common Data Configuration**.

## To Configure

1. Navigate to **Yardi Voyager**
2. Go to **Administration** → **System** → **Common Data Configuration**
3. Open or create the configuration used for **PetScreening**
4. Set permissions as **outlined on next page**

## Important Notes:

- **SSN access is not required** and should remain set to **None**
- Permissions not listed above can remain at their default values
- These permissions allow PetScreening to accurately associate pets, assistance animal documentation, and lease-related details with the correct prospect or resident

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## Required Permissions

PetScreening only requires access to the following fields:

Permission	Required Access
Name	Read
Address	Read
Phone Numbers	Read
Email	Read
Date of Birth	Read
Driver's License	None
SSN	None
Vehicle	Read
Ledger	Read
Lease Charges	Read
Lease Offers	Read
Scheduled Lease Renewals	Read
Rentable Items	Read
User Defined Fields	Read
Pets	Read

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## Yardi ILS & Guest Card Configuration - Petscreening

**Name:** Petscreening

**Code:** petscrn

**Type:** ILS & Guest Card

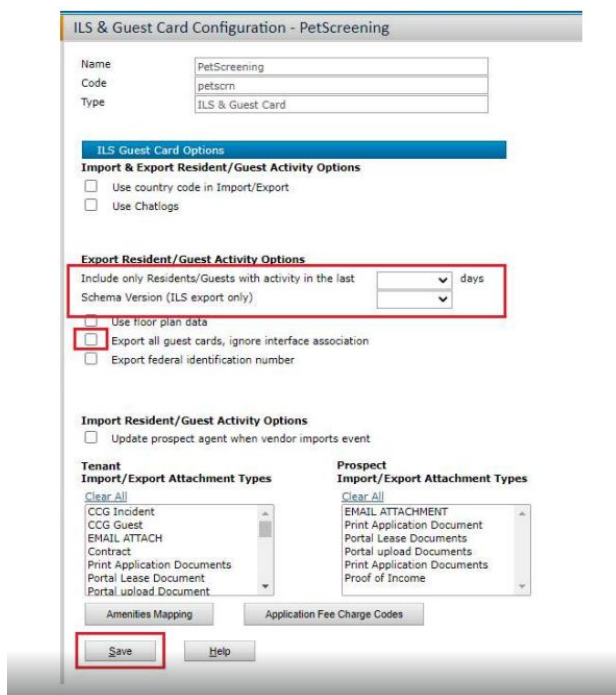
## ILS Guest Card Options

### Import & Export Resident/ Guest Activity Options

- Use country code in Import/Export - Leave unchecked
- Use Chatlogs - Leave unchecked

### Export Resident/ Guest Activity Options

- Include only residents/guests with activity in the last 90 days
  - Once your account is live, change this setting to 7 days
- Schema Version (ILS export only) - 4.0
- Use floor plan data - Leave unchecked
- Export all guest cards, ignore interface association - Check This Box
- Export federal identification number - Leave **Unchecked**



ILS & Guest Card Configuration - PetScreening

Name: PetScreening  
Code: petscrn  
Type: ILS & Guest Card

**ILS Guest Card Options**

**Import & Export Resident/Guest Activity Options**

Use country code in Import/Export  
 Use Chatlogs

**Export Resident/Guest Activity Options**

Include only Residents/Guests with activity in the last  days  
Schema Version (ILS export only)

Use floor plan data  
 Export all guest cards, ignore interface association  
 Export federal identification number

**Import Resident/Guest Activity Options**

Update prospect agent when vendor imports event

**Tenant Import/Export Attachment Types**

[Clear All](#)

CCG Incident  
CCG Guest  
EMAIL ATTACH  
Contract  
Print Application Documents  
Portal Lease Document  
Portal upload Document

**Prospect Import/Export Attachment Types**

[Clear All](#)

EMAIL ATTACHMENT  
Print Application Document  
Portal Lease Documents  
Portal upload Documents  
Print Application Documents  
Proof of Income

Amenities Mapping Application Fee Charge Codes

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## Recommended Setting

- **Honor Common Data Permission settings - Check this box**
- This ensures that the permissions configured in the **Common Data Configuration** section above are respected during data export.
- This setting is available for clients using **ILS Guest Card plug-in version 30.5 or higher**

All other options can be ignored. Choose "Save" at the bottom left of the prompt.

## Yardi PDF Notes Configuration

Here is what needs to be configured inside Yardi for the PDF notes to pass on to prospects and tenants.

## ILS Guest Card interface

1. Configure "PetScreening" under the Administration menu > System > Attachment Types. Ensure the following types are configured:
  - a. Tenant - PetScreening
2. Under the **Petscreening Interface Configuration**, please ensure that "**Petscreening**" is present under the boxes for both **Tenant AND Prospect** Import/Export Attachment Types.
3. Under the Common Data Configuration for PetScreening, please ensure the following Import/Export Attachment Types are present:
  - a. Tenant - Petscreening

**You are now configured for PDF notes!**