



PMC Yardi Interfaces Setup

For Yardi v.7S

Purpose, Scope and Assumptions

The purpose of this Document is to assist PMC that operates business using Yardi Voyager and/or other software from Yardi family of products with setup and configuration of PropertyVista software and the interfaces

More information and setup actions will be required throughout the setup, testing and implementation of PropertyVista products into Production.

While the most focus of this Document is on PropertyVista/Yardi interface setup, this document assumes that some areas of business data and workflows might be handled outside of Yardi and may continue be handled using other tools, or be migrated to PropertyVista.

This document also assumes that some of PMC's data, workflows and domains are handled differently on per region or building level. PMC is asked to specify this whenever relevant.

This document setup applies to Yardi Voyager 7S.

1. Interface Configuration

The following interfaces plugins and their minimal versions must be installed in Yardi environment and configured to operate with PropertyVista:

1. InterfacesPI v03.02
2. InterfacesBillingAndPaymentPI v01.03
3. InterfacesILSGuestCardPI v03.02
4. MaintenancePI v04.0

Note: From time to time PropertyVista may add other Yardi interfaces to the list. We will update our clients when new interfaces are introduced. We will also update this Document accordingly.

2. Property List Setup

Property List has to be setup as follows:

The screenshot displays the 'Property/Entity List' setup interface. On the left, a navigation menu is visible with 'Setup' highlighted. The main window shows the 'Property/Entity List' form with the following fields and controls:

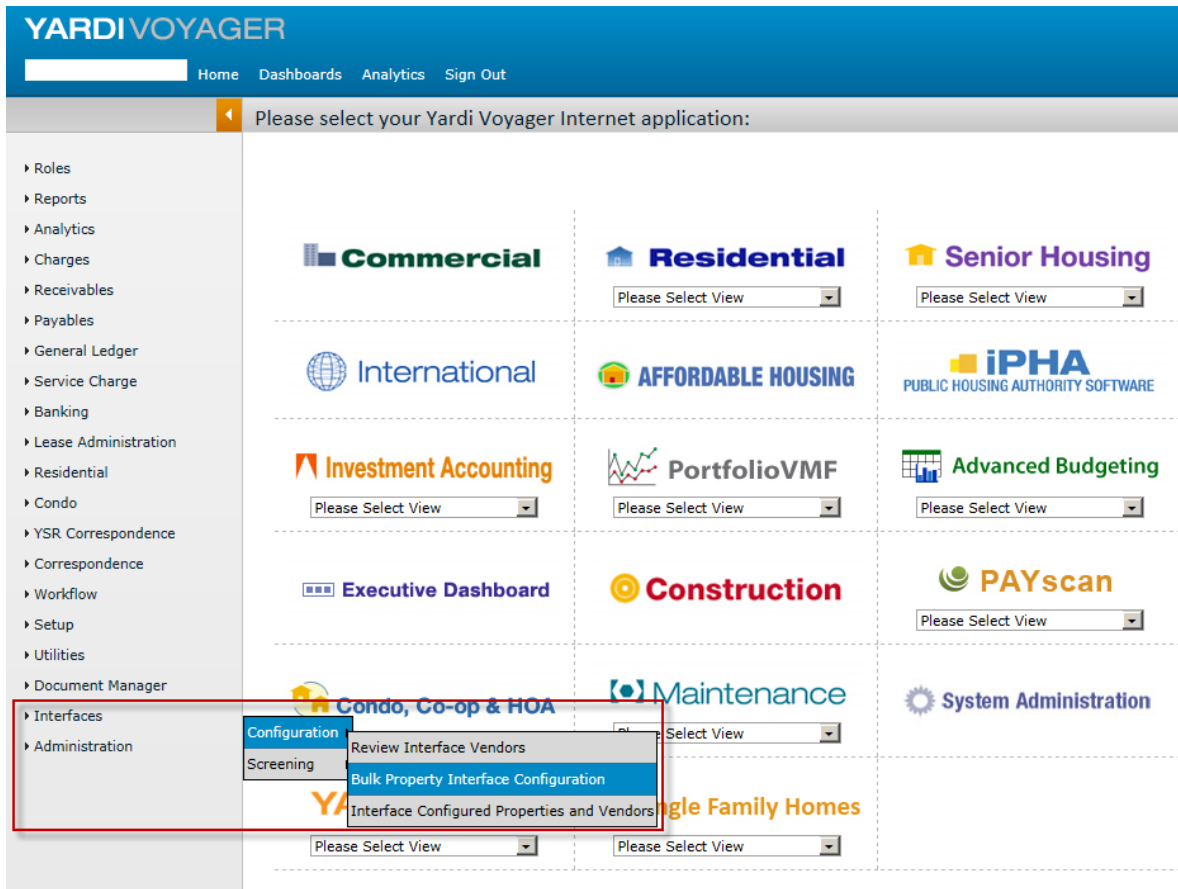
- Property List:** .pvista
- Description:** (empty text box)
- Buttons:** Save, New, Delete, Help, Save As
- Property/Entity List Attributes:** (tabbed view)
- Table:**

Property	Description	Percent
prop1		0.0000
prop2		0.0000
prop3		0.0000
		0.0000
		0.0000

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3. Interface Configuration

To configure interfaces for Property Vista:



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YARDIVOYAGER

Home Dashboards Analytics Sign Out

Interface Configuration

Property: .pvista

Interface Type: Billing & Payment

Available Agencies: Billing & Payment, Vendor Invoicing, ILS/Guest Card, Revenue Management, Collections, Renters Insurance, BlueMoon, Service Request, Connect Utilities, Resident Data

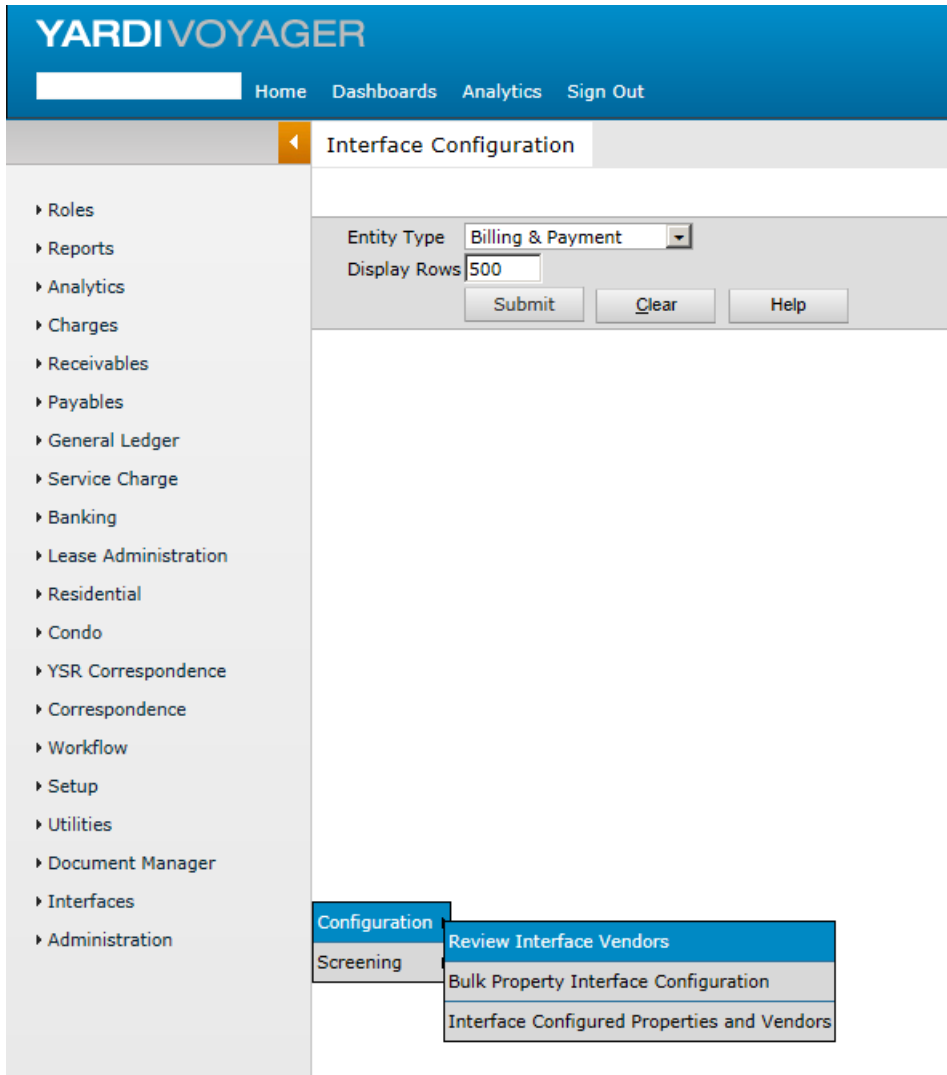
Save

- Roles
- Reports
- Analytics
- Charges
- Receivables
- Payables
- General Ledger
- Service Charge
- Banking
- Lease Administration
- Residential
- Condo
- YSR Correspondence
- Correspondence
- Workflow
- Setup
- Utilities
- Document Manager
- Interfaces

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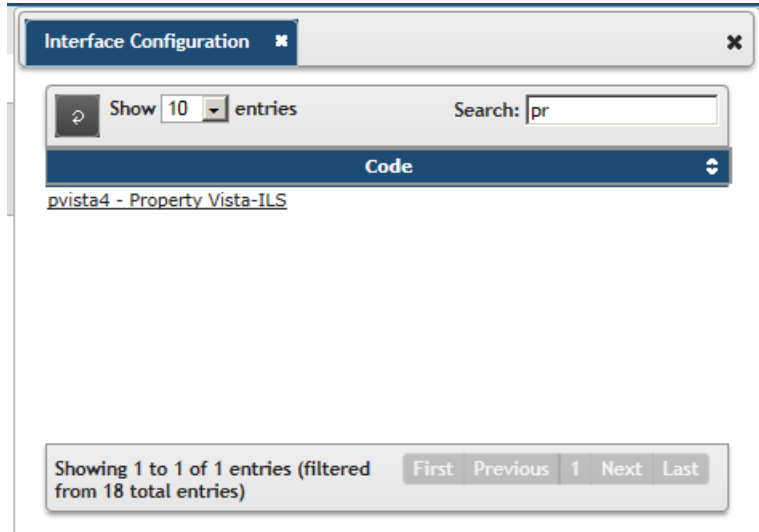
Repeat the following for every interface installed:

1. Select Interface:



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2. Press Submit Button and the following form will appear. Search for PropertyVista and click on the link:



The screenshot shows a web application window titled "Interface Configuration". At the top, there is a search bar with the text "Search: pr" and a "Show 10 entries" dropdown menu. Below the search bar is a table with a single row containing the text "pvista4 - Property Vista-ILS". At the bottom of the window, there is a pagination control showing "Showing 1 to 1 of 1 entries (filtered from 18 total entries)" and buttons for "First", "Previous", "1", "Next", and "Last".

3. The selected interface configuration form will appear on the screen.

4. Billing and Payment Interface Configuration

YARDIVOYAGER

Home Dashboards Analytics Sign Out

Billing & Payment Configuration - Property Vista

- Roles
- Reports
- Analytics
- Charges
- Receivables
- Payables
- General Ledger
- Service Charge
- Banking
- Lease Administration
- Residential
- Condo
- YSR Correspondence
- Correspondence
- Workflow
- Setup
- Utilities
- Document Manager
- Interfaces
- Administration

Name: Property Vista

Code: prvista

Type: Billing & Payment

Billing and Payment Options

Import Transactions Options

- Import Charge and Receipt Batches As Posted
- Import Payable Batches As Posted
- Separate Transaction Batches per Property

Export Tenant Options

Include residents moved out within last days

- Include Open Charges
- Include Billing Account Information
- Ignore Exclude Units Flag

Export Vendor Options

- Include Employees

Utilities & Charge Code Mappings

Save

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To grant your interface user access to post three billing periods in the past and/or future, change the default values set to 0 to 3 for entry fields in the red box:

The screenshot shows the YARDI VOYAGER Employee / User Setup interface. The 'Access to Past Periods' and 'Access to Future Periods' fields are highlighted with a red box and contain the value '3'. The interface includes a navigation menu on the left, a main form area with various input fields, and a 'Program Rights' section at the bottom.

Program Rights	Value	Access to Word	Access to Excel
Access to Past Periods	3	<input type="checkbox"/>	<input type="checkbox"/>
Access to Future Periods	3	<input type="checkbox"/>	<input type="checkbox"/>
View payroll trans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View all financial batches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View all conductor reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View secured attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post to control accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post to Intercompany Segment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interface User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read-Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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5. ILS Interface Configuration

In Yardi Navigate to Interfaces->Configuration->Review Interface Vendors and configure ILS/Guest Card interface Type as follows:

The screenshot shows the Yardi Voyager interface for configuring an ILS & Guest Card interface. The page title is "ILS & Guest Card Configuration - Property Vista-ILS".

YARDI VOYAGER
Home Dashboards Analytics Sign Out

ILS & Guest Card Configuration - Property Vista-ILS

- Roles
- Reports
- Analytics
- Charges
- Receivables
- Payables
- General Ledger
- Service Charge
- Banking
- Lease Administration
- Residential
- Condo
- YSR Correspondence
- Correspondence
- Workflow
- Setup
- Utilities
- Document Manager
- Interfaces
- Administration

Name: Property Vista-ILS
Code: pvista4
Type: ILS & Guest Card

ILS Guest Card Options

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

Import/Export Attachment Types

- RTA Decisions
- Tenant Correspondence
- Lease - commercial**

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In Yardi Navigate to Interfaces->Configuration, find the corresponding property, select ILS/Guest Card interface Type and the building or property list with the Property Vista-ILS

YARDI VOYAGER

Home Help Sign Out

Interface Configuration

Property: .pvista

Interface Type: ILS/Guest Card

Available Agencies:

- L1 Technology
- Lead Tracking Solutions
- Lead2Lease
- MaxLeases
- Power Leasing Systems
- Property Vista-ILS**
- Pynwheel
- SphereXX.com

Save

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In Yardi navigate to Setup->Property->Review Property:

The screenshot shows the YARDIVOYAGER web application interface. At the top, there is a blue header with the logo and navigation links: Home, Help, and Sign Out. Below the header, a breadcrumb trail shows 'Property'. On the left, a sidebar menu lists various categories, with 'Setup' highlighted in a red box. Under 'Setup', a sub-menu is open, showing 'Property' highlighted in a red box. A further sub-menu is open under 'Property', with 'Review Property' highlighted in a red box. The main content area displays a search form for 'Property Vista List' with fields for Address, City, State, and Display Rows (set to 500), and buttons for Submit, Clear, and Help.

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Find the corresponding property, open Agents screen, add "Property Vista-ILS" string into the Agent Name field and save the record:

The screenshot shows the Yardi Voyager interface. The main window is titled 'Property' and contains a form with fields for Name, Address, City (Toronto), Prov-Post Code (ON M4P 1Y3), and Country (ca). A 'Functions' dropdown menu is open, with 'Agents' highlighted. A blue arrow points from the 'Agents' option to a 'Leasing Agents' sub-window. This sub-window has a table with columns 'Agent Name' and 'Start Date'. The 'Agent Name' field contains the text 'Property Vista-ILS'.

Description	Value
Portfolio Type	Rental
Region	Central Toronto
Property Type	Highrise
Property Manager	
SUBGROUP5	
SUBGROUP6	
SUBGROUP7	

Agent Name	Start Date
Property Vista-ILS	

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Open Sources screen, add "ILS" string into the Source Name field and save the record:

The screenshot shows the Yardi Voyager interface. The 'Property' menu is selected, and the 'Functions' dropdown is open, with 'Sources' highlighted. A blue arrow points from 'Sources' to the 'ILS' entry in the 'Leasing Sources' table. The table has columns for Source Name, Inactive Date, and Show in Portal. A 'Save' button is at the bottom of the table.

Source Name	Inactive Date	Show in Portal
ILS		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Description	Value
Portfolio Type	Rental
Region	Central Toronto
Property Type	Highrise
Property Manager	
SUBGROUP5	
SUBGROUP6	
SUBGROUP7	