

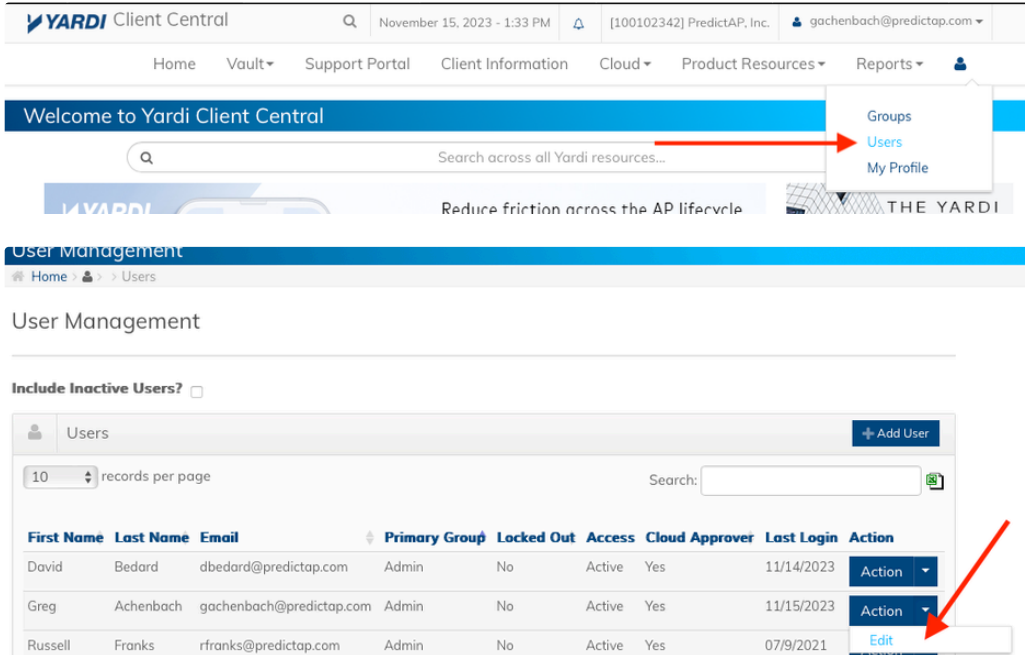
New PO Installing Yardi PO Package

Package: `ss_PO_Data_Export_to_SFTP.pkg`

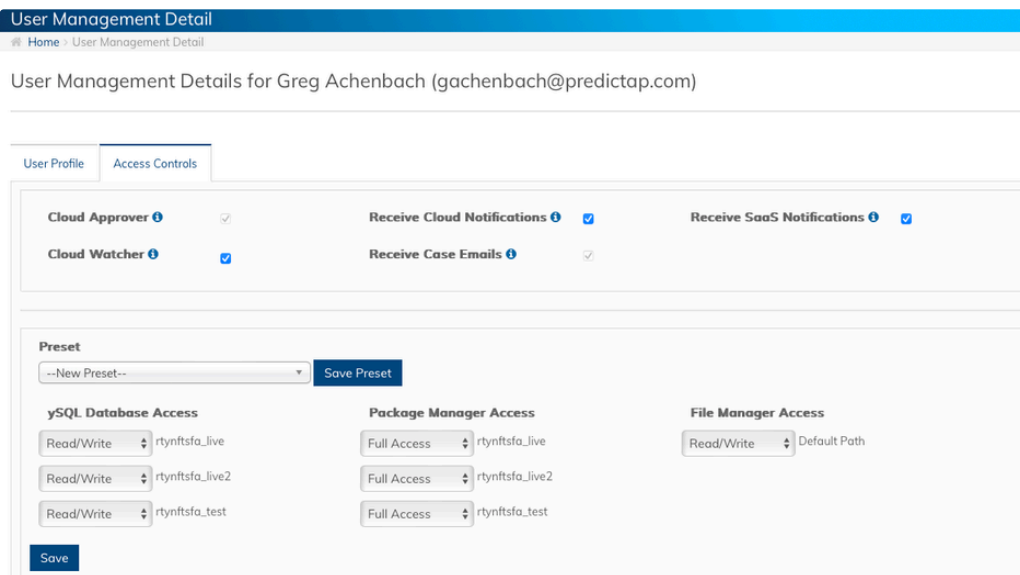
Client facing PDF of instructions:

Installing the Package in Yardi Client Central

1. Check User Permissions

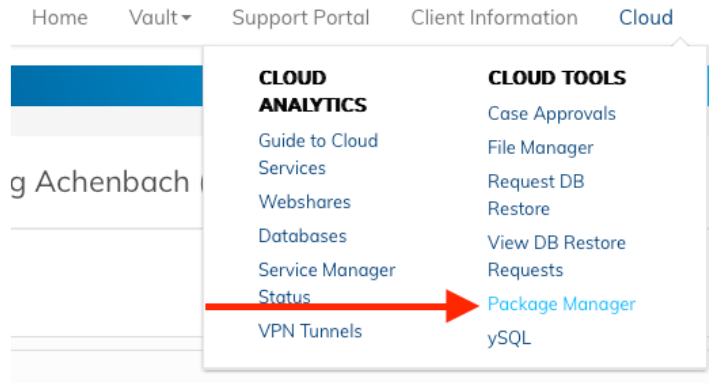


Set "ySQL Database Access" to Read/Write and "Package Manager Access" to Full Access



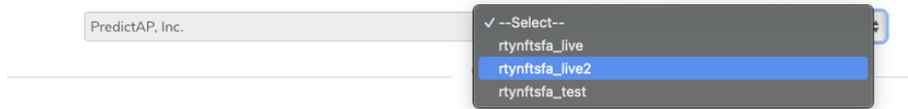
2. Install Package

Go to Package Manager

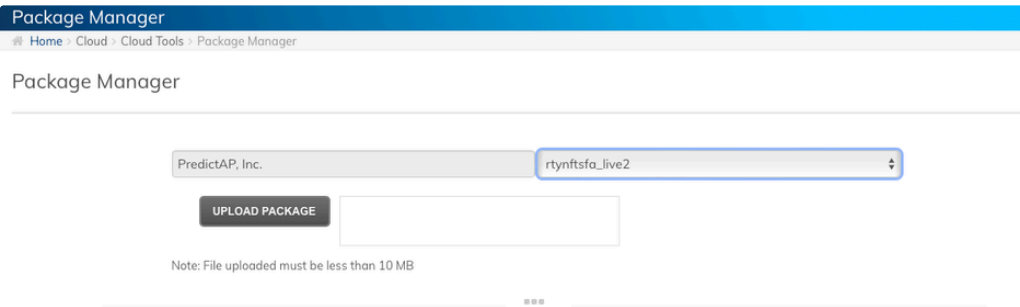


Select Database

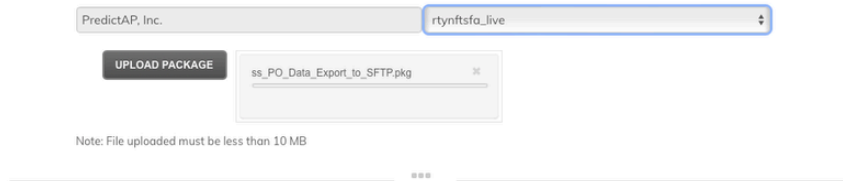
Package Manager



Upload the package



Package will appear as "ss_PO_Data_Export_to_SFTP.pkg"



File Name	Status	Date Added	Uploaded By	Date Executed	Executed By	Execute	Log	Delete
ss_PO_Data_Export_to_SFTP.pkg	Uploaded	11/15/2023 10:40:39 AM	Greg Achenbach					

Click Execute

File Name	Status	Date Added	Uploaded By	Date Executed	Executed By	Execute	Log
ss_PO_Data_Export_to_SFTP.pkg	Uploaded	11/15/2023 10:40:39 AM	Greg Achenbach				

After a minute, click the Refresh button:

YARDI Client Central

Package Manager

PredictAP, Inc. rtnynfsfa_live

UPLOAD PACKAGE

ss_PO_Data_Export_to_SFTP.pkg

Note: File uploaded must be less than 10 MB

Packages

10 records per page

When installed the package should appear as:

File Name	Status	Date Added	Uploaded By	Date Executed	Executed By	Execute	Log	Delete
ss_PO_Data_Export_to_SFTP.pkg	Finished	11/15/2023 10:40:39 AM	Greg Achenbach	11/15/2023 10:42:29 AM	Greg Achenbach		Download	

3. To Execute the script in the package, to go ySQL

Support Portal Client Information Cloud

CLOUD ANALYTICS

- Guide to Cloud Services
- Webshares
- Databases
- Service Manager
- Status
- VPN Tunnels

CLOUD TOOLS

- Case Approvals
- File Manager
- Request DB
- Restore
- View DB Restore
- Requests
- Package Manager
- ySQL

Select the database:

Client Central ySQL

PredictAP, Inc. ySQL Server Contr

5000 row result limit: ***Warning: Unlimited to screen may cause sluggish browser... Limited 5000

Query 1 x +New Query

--Select--

Farm Databases

- ASP1 - rtnynfsfa_live
- ASP1 - rtnynfsfa_live2
- ASP1 - rtnynfsfa_test

Use the following statement "exec sp_PO_Data_Export" and click Submit

PredictAP, Inc. ASP1 - rtyntfsa_live2

5000 row result limit: **Limited 5000**

***Warning: Unlimited to screen may cause sluggish browser...

Query 1 x +New Query Hide Filter

```
1 exec sp_PO_Data_Export
```

Submit Format SQL Submit to CSV

Query Result

The results will appear, you can click "Export Current Page" to download them

Query 1 x +New Query Show Filter

```
1 exec sp_PO_Data_Export
```

Submit Format SQL Submit to CSV

Query Result

Table 1 Messages

Show 25 entries Copy selection **Export Current Page**

PO_Code	POH_VendorCode	POH_VendorName	POH_VendorAddress	POH_VendorCity	POH_VendorState	POH_VendorZip	POH_VendorPhone
1	v0000004	HD Supply	13571 Vaughn St.	San Fernando	CA	91340	8183616162
2	v0000022	Start Line Carpet Cleaners	45 Focus Ave	Hopkinton	MA	01748	8139854986
2	v0000022	Start Line Carpet Cleaners	45 Focus Ave	Hopkinton	MA	01748	8139854986
3	v0000041	SecureSpace Security Consultants	129 Sturbridge Rd	Charlton	MA	01507	8887879896
4	v0000041	SecureSpace Security Consultants	129 Sturbridge Rd	Charlton	MA	01507	8887879896
5	v0000007	McMaster-Carr Supply Company	PO Box 7690	Chicago	IL	60680-7690	5626925911

Showing 1 to 6 of 6 entries

First Previous 1 Next Last

Choose the "CSV" option

Query Result - Exec Time: 116ms

Table 1 Messages

Show 25 entries Copy selection **Export Current Page**

- CSV
- EXCEL
- Print

PO_Code	POH_VendorCode	POH_Vendor	POH	
1	1	v0000004	HD Supply	13
2	2	v0000022	Start Line	45
3	2	v0000022	Start Line Carpet Cleaners	45
4	3	v0000041	SecureSpace Security Consultants	12
5	4	v0000041	SecureSpace Security Consultants	12
6	5	v0000041	SecureSpace Security Consultants	12

Showing 1 to 6 of 6 entries

Check the Include header row? checkbox, uncheck the Include "NULL" word? checkbox and click the "Export" button

Query Result - Exec Time: 116ms

Table 1 Messages

Show 25 entries Copy selection Export Current Page

	PO_Code	POH_VendorCode	POH_VendorName
1	1	v0000004	HD Supply
2	2	v0000022	Start Line Carpet Cleaners
3	2	v0000022	Start Line Carpet Cleaners
4	3	v0000041	SecureSpace Security Consultants
5	4	v0000041	SecureSpace Security Consultants
6	5	v0000041	SecureSpace Security Consultants

Showing 1 to 6 of 6 entries

Export Data ✕

Copying data to CSV file...

Include header row?

Include "NULL" word?

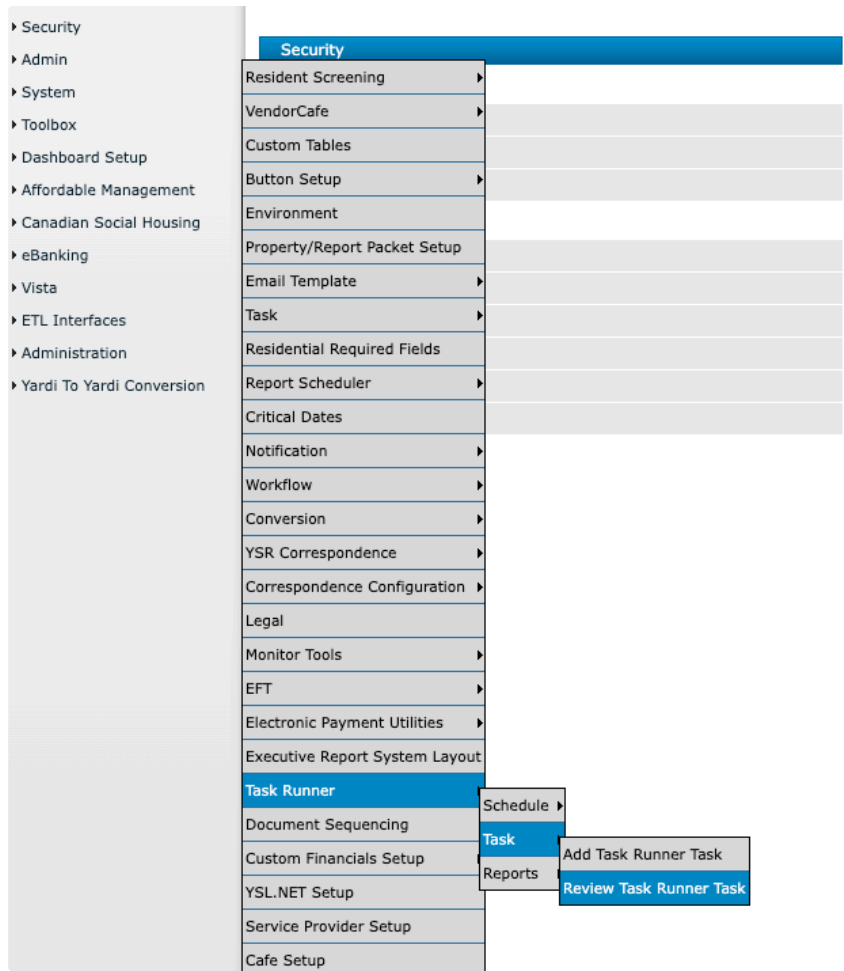
Export Cancel

Configuring the Package in Voyager

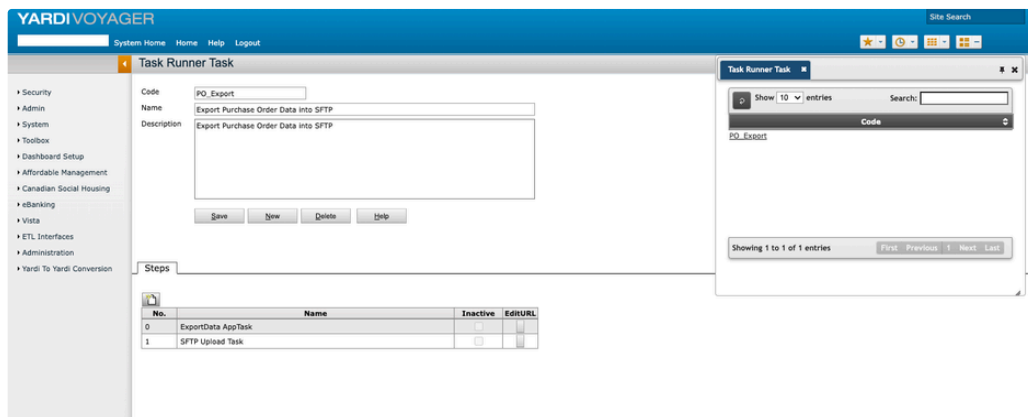
1. Go to "System Administration"

The screenshot shows the Yardi Voyager application interface. At the top, there is a blue header with the text 'YARDI VOYAGER' and navigation links for 'Home', 'Help', and 'Sign Out'. Below the header, a message says 'Please select your Yardi Voyager Internet application:'. On the left side, there is a vertical navigation menu with various categories like Reports, Charges, Receivables, Payables, Mortgage, G/L, Residential, Revenue Management, YSR Correspondence, Lease Administration, Setup, Administration, Purchasing, Service Contract, Work Order, Unit Asset, Performance, New York, and Interfaces. The main area of the interface is a grid of application tiles. Each tile has an icon and a title, with some having a 'Please Select View' dropdown menu. The tiles include: Commercial, Residential, Senior Housing, International, AFFORDABLE HOUSING, PHA PUBLIC HOUSING AUTHORITY SOFTWARE, Investment Accounting, ABF Valuations, Advanced Budgeting, Condo, Co-op & HOA, Construction, PAYscan, Single Family Homes, Facilities Management, YARDI CRM™, Student Housing, Military Housing, and System Administration. A red arrow points to the 'System Administration' tile.

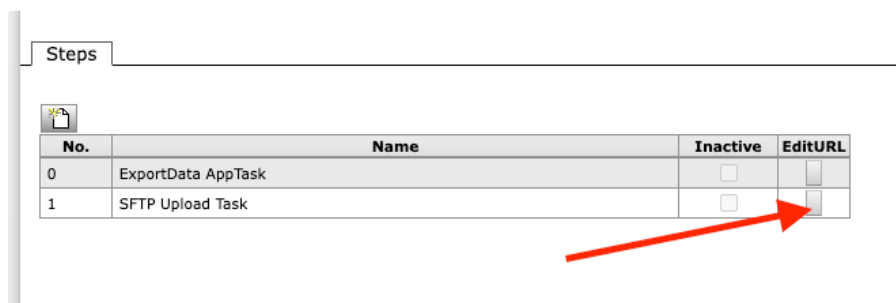
2. Open the "Task Runner" Task:



Look for the Task "PO_Export"



Click "Edit URL" next to the "SFTP Task"



Update the SFTP settings

Task Runner Step

Template: SFTP

Name: SFTP Upload Task

Description: Upload the exported PO data into SFTP folder

Order: 1

Inactive: Execute only if task already failed:

Save New Delete Help

Details

Name	Value
AttemptResume	False
AuthenticationMode	Password
CopyOnFailureFolder	
CopyOnSuccessFolder	
DeleteSourceAfterTransfer	True
Direction	Upload
IdleTimeout	180
LocalFile	*.csv
LocalFolder	
MaxRetries	
Password	***
Port	22
PrivateKeyFile	
RemoteFile	
RemoteFolder	
RetryWaitInterval	60
Server	
ServerHostKey	
User	

3. Ask the client to open a case with Yardi to schedule the task
4. Once the task has been scheduled, the schedule can be reviewed:

The screenshot shows the Yardi Voyager navigation menu on the left, with 'Task Runner' highlighted in blue. The right-hand side shows a dropdown menu for 'Task Runner' with the following items: Schedule, Task, and Reports. The 'Schedule' item is further expanded to show 'Add Task Runner Task Schedule' and 'Review Task Runner Task Schedule'. Above the menu, a search bar contains 'PO_Export' and a table header 'Name' is visible.

The schedule will be called "Export Purchase Order Data into SFTP"

The screenshot displays the 'Task Runner Task Schedule' configuration page in the Yardi Voyager application. The page title is 'Task Runner Task Schedule'. A dropdown menu for 'Task' is set to 'PO_Export - Export Purchase Order Data into SFTP'. The 'Name' field contains 'Export Purchase Order Data into SFTP' and the 'Description' field contains 'Export Purchase Order Data into SFTP'. Below these fields are input boxes for 'Inactive' (unchecked), 'Timeout (seconds)' (43,200), and 'Priority' (0). The 'Last run' field shows '1/1/0001 12:00:00 AM'. At the bottom, there are sections for 'Notifications' with options for 'Mutually exclusive' and 'Blackouts', and checkboxes for 'Notify on failure' and 'Notify on success' with corresponding recipient input fields.