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

	Client Cer	ntral	Q Novem	iber 15, 2023 - 1	:33 PM 🗘	[100102342] Pr	edictAP, Inc. 🍐 gach	enbach@predictap.com
	Home	e Vault• Su	ipport Portal	Client Info	rmation C	loud - Pro	duct Resources -	Reports 👻 🛔
Velcome	e to Yardi	Client Centra						Groups
	٩			Search acro	oss all Yardi re	sources		Users My Profile
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Users Users 10 ¢r First Name	s Last Namé Bedard	uge Emoil dbedard@predictap	∳ Prim .com Admi	ary Group[*] La n No	ocked Out Act	Search: Cess Cloud A Ves	pprover Lost Login 11/14/2023	+ Add User
Users Users Users Users First Name David Greg	tive Users? (s records per pa Last Name Bedard Achenbach	ige Email dbedard@predictap gachenbach@predic	Prim .com Admi .tap.com Admi	ary Group Le n No	acked Out Ac c Act	Search: Cloud A ive Yes ive Yes	pprover Last Login 11/14/2023 11/15/2023	+ Add User

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

er Mar	r Management Detail	tails for Gr	eg Achenbach (gachenbach@p	oredicta	p.com)
er Profile	Access Controls				
Cloud /	Approver ()	V	Receive Cloud Notifications 0		Receive SaaS Notifications 0
Cloud \	Watcher 9	•	Receive Case Emails ()		
Preset					
New Pr	reset		Save Preset		
ySQL D	atabase Access		Package Manager Access		File Manager Access
	rite 🛊 rtynftsfa	live	Full Access 💠 rtynftsfa_live		Read/Write 💠 Default Path
Read/W					
Read/W Read/W	rite 🛊 rtynftsfa_	live2	Full Access 💠 rtynftsfa_live2		

2. Install Package



Select Database

Package Manager



Upload the package

Package Manager			
Home > Cloud > Cloud To	ols > Package Manager		
Package Manage	er		
	(m. 1999)		-
	PredictAP, Inc.	rtynftsfa_live2	Ŷ
	UPLOAD PACKAGE		
	Note: File unloaded must be less than 10 MB		
	Note: The uploaded must be less than 10 mb		

Package will appear as "ss_PO_Data_Export_to_SFTP.pkg"

PredictAP, Inc.	rtynftsfa_live	¢
UPLOAD PACKAGE	_Data_Export_to_SFTP.pkg ×	
Note: File uploaded must be less than 10	0 MB	
	000	

Packages 2								
10 ¢ records per page					Search:			8
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			0		8

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			0	

After a minute, click the Refresh button:

YARDI Client Central			Your package has entered a queue * PM A [100102342] PredictAP, Ir and will be loaded shortly.				
	Home	Vault -	Support Portal	Client Information	Cloud - Product Resource		
PredictAP, Inc.			rtynf	tsfa_live	\$		
UPLOAD PACKAGE	ss_PO	_Data_Export	t_to_SFTP.pkg	36			
Note: File unloaded must b	e less than 1	0 MB					
Note: The uploaded must b		o MD					
Packages C							
10 ¢ records per page					Search:		

When installed the package should appear as:

Packages 2								
10 🗘 records per page Search:								
			Uploaded		Executed			
\$	÷		opiouucu		CALCULLU	-		
File Name	Status	Date Added	Ву	Date Executed	By	Execute	Log	Delete

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

Support Portal	Client Information Cloud
CLOUD ANALYTICS	CLOUD TOOLS
Guide to Cloud Services Webshares	File Manager Request DB Restore
Databases Service Manager Status	View DB Restore Requests Package Manager
VPN Tunpels	ySQL

Select the database:

PredictAP, Inc.	Select	*
		٩
5000 row result limit: Limited 5000	Select	
may cause sluggish browser	Farm Databases	
	ASP1 - rtynftsfa_live	
	ASP1 - rtynftsfa_live2	
Ourse 1 -	ASP1 - rtynftsfa_livez	

Use the following statement "exec sp_PO_Data_Export" and click Submit

Client Central	ySQL
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PredictAP, Inc.	ASP1 - rtynftsfa_live2 *
5000 row result limit: ***Warning: Unlimited to screen may cause sluggish browser	
Query 1 × +New Query	Hide Filter
Query Window 1 exec sp_P0_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 🗙	+New Query						Show Filt
Juery Window	v						
1 exec sp	 _PO_Data_Export						
Submit F	ormat SQL						Submit to CSV
many result							
Table 1	Messages	py selection Export Current Page					
Table 1 how 25	Messages tentries Co	py selection Export Current Page	PON Venderäddress	POH Vendorfity	POR VendorState	POH Vendoržin	PON VendorPhone
Table 1 how 25 PO_Code	Messages t entries Co POB_VendorCode v0000004	py selection Export Current Page POH_VendorName HD Supply	POH_VendorAddress 13571 Vaughn St.	POH_VendorCity San Fernando	POH_VendorState CA	POH_VendorZip 91340	POH_VendorPhone 8183616162
Table 1 how 25 PO_Code 1 2	Messages contries Co POH_VendorCode v0000004 v0000022	py selection Export Current Page POH_VendorName HD Supply Start Line Carpet Cleaners	POH_VendorAddress 13571 Vaughn St. 45 Focus Ave	POH_VendorCity San Fernando Hopkinton	POH_VendorState CA MA	POH_VendorZip 91340 01748	POH_VendorPhone 8183616162 8139854986
Table 1 how 25 PO_Code 1 2 2	Messages • entries Co POH_VendorCode v0000004 v00000022 v0000022	POH_VendorName HD Supply Start Line Carpet Cleaners Start Line Carpet Cleaners	POH_VendorAddress 13571 Vaughn St. 45 Focus Ave 45 Focus Ave	POH_VendorCity San Fernando Hopkinton Hopkinton	POH_VendorState CA MA	POH_VendorZip 91340 01748 01748	POH_VendorPhone 8183616162 8139854986 8139854986
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PO_Code 1 2 2 3 2 4 3 5 4 5	Messages • entries Co POH_VendorCode v0000022 v0000022 v0000022 v0000041 v0000041	POH_VendorName POH_VendorName HD Supply Start Line Carpet Cleaners SecureSpace Security Consultants SecureSpace Security Consultants Medsater-Carr Supply Company	POH_VendorAddress 13571 Vaughn St. 45 Focus Ave 129 Sturbridge Rd 129 Sturbridge Rd PO Box 7690	POH_VendorCity San Pernando Hopkinton Charlton Charlton Chicago	POH_VendorState CA MA MA MA IL	POH_VendorZip 91340 01748 01507 60680-7690	PON_VendorPhone 8183616162 8139854986 8139854986 8887879896 8887879896 8887879896

Choose the "CSV" option

				Messages	ble 1	Tab
	rent Page	Export Curre	opy selection	~ entries Co	v 25	Show
P		CSV 🔶	POH Vendor	POH VendorCode	0 Code	PC
		EXCEL	HD Supply	v0000004		1 1
		Print	Start Line	v0000022		22
	eaners	Carpet Cle	Start Line	v0000022		32
ts	Consultan	Security	SecureSpace	v0000041		43
ts	Consultan	Security	SecureSpace	v0000041		54
ts	Consultan	Security	SecureSpace	v0000041		65

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

						Export Data	×
Tabl	le 1	Messages					
Show	25	~ entries	Copy selection	Export Curr	rent Page	Copying data to CSV fil	e
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P0	_Code	POH_Vendor	Code POH_Vendor	Name			
11		v0000004	HD Supply				
2 2		v0000022	Start Line	Carpet Cle	eaners	Include "NULL" word?	
32		v0000022	Start Line	Carpet Cle	eaners		
4 3		v0000041	SecureSpac	e Security	Consultant	s	
54		v0000041	SecureSpac	e Security	Consultant	s	
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Configuring the Package in Voyager

1. Go to "System Administration"



2. Open the "Task Runner" Task:

Security		
• Admin	Security	7
▶ System	Resident Screening	
• Toolbox	VendorCafe I	•
Dashboard Setup	Custom Tables	
Affordable Management	Button Setup	•
Canadian Social Housing	Environment	
▶ eBanking	Property/Report Packet Setup	
• Vista	Email Template	•
• ETL Interfaces	Task	•
Administration	Residential Required Fields	
Yardi To Yardi Conversion	Report Scheduler	•
	Critical Dates	
	Notification	•
	Workflow	•
	Conversion I	•
	YSR Correspondence	•
	Correspondence Configuration	•
	Legal	1
	Monitor Tools	•
	EFT	•
	Electronic Payment Utilities	•
	Executive Report System Layout	t
	Task Runner	Schadula N
	Document Sequencing	
	Custom Financials Setup	Add Task Runner Task
	YSL.NET Setup	Review Task Runner Task
	Service Provider Setup	
	Cafe Setup	

Look for the Task "PO_Export"

ARDIVOYA	GER				Site Search	
Sy	stem Home Hor	ne Help Logout		★ • <u>0</u> • ⊞ •		
	Task Run	ner Task		Task Runner Task 🕷		
Security	Code	PO Evout				
Admin	Name	Export Purchase Order Data into SFTP		Show 10 v entries Search:		
System	Description	Export Purchase Order Data into SFTP		Code		
Toolbox				PO_Export		
Dashboard Setup						
Affordable Management						
Canadian Social Housing						
eBanking						
Vista		Save New Delete Help				
ETL Interfaces						
Administration				Showing 1 to 1 of 1 entries First Previ	ous 1 Next Last	
Yardi To Yardi Conversion	Steps					
	No.	Name	Inactive EditURL			
	0 Ex	portData AppTask				
		TP Unload Task				

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

<u>ام</u>			
No.	Name	Inactive	EditURL
)	ExportData AppTask		
L	SFTP Upload Task		

Template	SFTP	
Name	SFTP Upload Task	
Description	Upload the exported PO dat	ta into SFTP folder
Order	1	
nactive		Execute only if task already failed
	Save New	Delete Help
	Name	Value
AttemptResume		False
Attemptitesu		
Authenticatio	onMode	Password
Authenticatio CopyOnFailur	nMode reFolder	Password
Authenticatio CopyOnFailur CopyOnSucco	nMode reFolder essFolder	Password
Authenticatio CopyOnFailur CopyOnSucce DeleteSource	nMode reFolder essFolder AfterTransfer	Password True Upland
Authenticatio CopyOnFailur CopyOnSucce DeleteSource Direction	nMode reFolder essFolder AfterTransfer	Password True Upload 180
Authenticatio CopyOnFailur CopyOnSucce DeleteSource Direction IdleTimeout	nMode reFolder essFolder AfterTransfer	Password Password True Upload 180 *.csv
Authenticatio CopyOnFailur CopyOnSucce DeleteSource Direction IdleTimeout LocalFile LocalFolder	nMode reFolder essFolder AfterTransfer	Password True Upload 180 *.csv
Authenticatio CopyOnFailur CopyOnSucce DeleteSource Direction IdleTimeout LocalFile LocalFolder MaxRetries	onMode reFolder essFolder AfterTransfer	Password Password True Upload 180 *.csv
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Authenticatio CopyOnFailur CopyOnSucce DeleteSource Direction IdleTimeout LocalFile LocalFolder MaxRetries Password Port PrivateKeyFil RemoteFile RemoteFile	nMode reFolder essFolder AfterTransfer e	Password Password True True Upload 180 *.csv **** 22
Authenticatio CopyOnFailur CopyOnFailur CopyOnSucce DeleteSource Direction IdleTimeout LocalFolder MaxRetries Password Port PrivateKeyFil RemoteFile RemoteFolde RetryWaitInte	e	Password Password Image: Imag

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:

Security	Code PO_Export					
▶ Admin	Name Contractor	e Order D	ata into	SFTP		
 System 	Resident Screening	e Order D	Data into	SFTP		
Toolbox	VendorCafe	•				
Dashboard Setup	Custom Tables	_				
Affordable Management	Button Setup	•				
Canadian Social Housing	Environment	_				
▶ eBanking	Property/Report Packet Setup					
▶ Vista	Email Template	▶ <u>N</u> ew		<u>D</u> elete	<u>H</u> elp	
• ETL Interfaces	Task	Þ				
 Administration 	Residential Required Fields					
Yardi To Yardi Conversion	Report Scheduler	•				
	Critical Dates					
	Notification	•				
	Workflow	•	Na	me		
	Conversion	•				
	YSR Correspondence	•				
	Correspondence Configuration	•				
	Legal					
	Monitor Tools	•				
	EFT	•				
	Electronic Payment Utilities	•				
	Executive Report System Layo	Jt				
	Task Runner					
	Document Sequencing	Schedule	Add Tas	k Runner 1	Task Schedule	
	Custom Financials Setup	Task	Review	Task Runn	er Task Schedule	
	YSL.NET Setup	Reports	•			1
	Service Provider Setup					

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

1	Site Search
ome Home Help Logout	* • O· · · ·
isk Runner Task Schedule	Task Runner Task 🕷 Task Runner Task Schedule 🕷 🗰 🗰
Hosted clients must contact Yardi Systems to schedule tasks for them. K K COLEPART - Expert Purchase Order Data into STP Sociption Expect Purchase Order Data into STP Expect Purchase Order	Interview Interview Interview Showing 1 to 3 of 3 entries (filtered First: Preview: 1 Hext: Last
	Next Netry Netry Lagout Sk Runner Task Schedule Nexted clients mut certext Yard Systems to schedule tasks for them. K K C C C C C C C C C C C