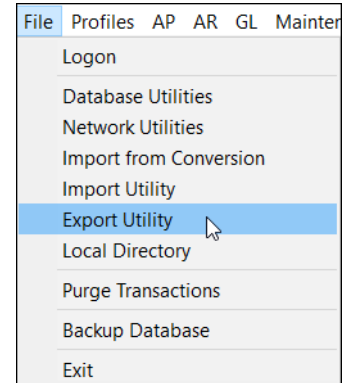
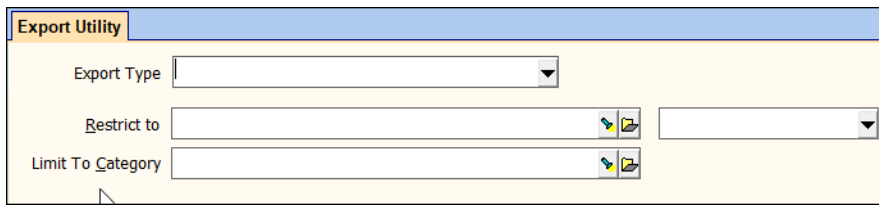


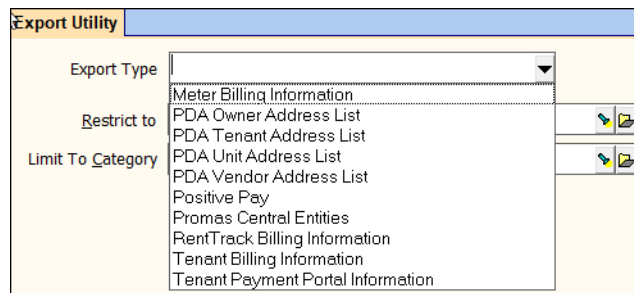
## Overview

This utility is found under <<File, Export Utility>>.

It exports data so it can be easily imported into other applications or other hardware.



The exports include [PDA](#) (Palm) type address books (for owners, tenants, units and vendors), our meter billing application, [positive pay](#), and several file formats for [billing information](#) for third party vendors. All output files are in CSV format.



## Export to PDA

In PROMAS go to <<File, Export Utility>>. There are four exports that you can run: owner address list, tenant address list, unit address list and vendor address list. Select the report you wish to run. You may fill in the Limit to Category and/or Restrict to field. If you want the address to be separated by management group or any other category in your PDA you must make that distinction here. Click <Compile>. A screen will appear telling you how many records were exported and the location of that file. The file is normally saved in the export folder located in your data folder. Write down the location of the file. Click OK.

The exported CSV files include:

- **Tenant:** Short ID, Long Description, Unit Long Description, Unit ID, Phone #s, Email Address, Tenant Name, , City, State, Zip code, Owner Short ID, Owner Long Description
- **Owner:** Short ID, Long Description, Phone #s, email address, Name from permanent address field, City, State, Zip code
- **Vendor:** Short ID, Long Description, Phone #s, Name from permanent address field, email address, City, State, Zip code
- **Unit:** Short ID, Long Description, Owner Long Description, Owner Short ID, Owner Phone #s, , owner's email address Owner Name from permanent address field, Owner City, State, Zip code

### **Import to PDA**

Open your Palm Desktop Software, click on the address button on the left-hand side of the screen. Click on the black drop down arrow next to Categories. Highlight the category that you want the previously run report entered into and hit OK. If the category you want is not listed, click the <New> button and enter in a new category name; i.e.: owners, vendors, units or tenants. Click <OK>. You can be as specific or general as you wish. If you have multiple management groups you can create categories for management group A owners, management group B owners, management group A tenant, management group B tenants, etc. Different categories will make it easier to find names and address in your PDA.

Select the category and click <OK>.

Go to <<File, Import>>. An Import screen will appear. At the top of the screen you must select the location of the file where Promas saved the report. At the bottom of the screen it says files of type, click on the black drop down arrow and select comma separated (\*.csv, \*.txt). In the middle of the screen a listing of all the reports you exported will appear. Highlight one and click <Import>. (Remember it will be importing the information into the category you selected. You do not want to import owners into the category of tenants.)

The specify imports fields screen will display. Click the <Reset> button on the right hand side and then click <OK>. Your files are now being imported into your Palm Desktop. A screen will appear telling you how many records were imported. Click <OK>.

### **Import to Outlook/Outlook Express**

These files can also be used to import into Outlook Express or Outlook. See the [How To PDF document #361](#).

## **Export for Positive Pay**

Select the Positive Pay as the Export Type. When you click <Compile> a CSV file is created for each bank account listing the unreconciled / unmarked outstanding checks. This file can be used to make a file in the format the bank requires for Positive Pay. It is possible to enter a date range, and the dates will be included in the file.

The standard format is shown below. If your bank needs a different format please contact the Help Desk. There may be custom programming that can create the format for you.

### **Option 1 – standard format**

If no special codes are entered, the file format is CSV with the following fields:

- Account #
- Check #
- Check Amount (xxxx.xx)
- Check Date (YYYY-MM-DD)
- Payee Name
- Check Memo

### **Export PROMAS Central Entities**

This file, named PC\_Entity.csv, contains the PROMAS Central Entity number for each profile in the database. It will help in adding documents into the Upload folder directly for uploading to PROMAS Central. See Document Manager for more information.

### **Tenant Billing - Rent Track**

This file is used by third party payment facilitators like RentTrack. The file is used to initially setup the account and to periodically upload amount owed by tenants. File name is RENTTRACK.CSV.

The CSV file has the following information for active tenants:

- Tenant ID
- Tenant Name
- Rent Amount
- Unpaid Charges
- Unit ID
- Unit Name
- Unit Address line 1
- Unit Address line 2
- Unit City (or last line of foreign address)
- Unit State (blank if foreign address)
- Unit Zip (blank if foreign address)
- Past Tenant (Y = past)
- Lease Start (MM/DD/YYYY)
- Lease End (MM/DD/YYYY)
- Move Out (MM/DD/YYYY)
- Tenant Lease Status (Y=month to month)

## Tenant Billing Information

This file is used by third party payment facilitators like PayLease. The file is used to initially setup the account and to periodically upload amount owed by tenants. File name is TEN\_BILL.CSV.

The CSV file has the following information for active tenants:

- Tenant ID
- Tenant Name
- Rent Amount
- Unpaid Charges
- Unit ID
- Unit Name
- Unit Address line 1
- Unit Address line 2
- Unit City (or last line of foreign address)
- Unit State (blank if foreign address)
- Unit Zip (blank if foreign address)
- Past Tenant (Y = past)

## Tenant Payment Portal Information

This creates a CSV file named TenantPortal.csv for every tenant with a status of Current (including Eviction, Notice), Future, or Past Active.

Fields:

Tenant lookup	Unit lookup
Tenant GUID	Unit GUID
Tenant ID	Unit ID
Tenant name	Unit name
Tenant status	Unit address – line 1
Lease start date	Unit address – line 2
Lease end date	Unit city
Move out date	Unit state
Month to month (Y or N)	Unit zip code
Balance due	Deposit to routing #
Unpaid charges	Deposit to account #
No payments (Y or N)	