



## Overview

This document explains how to integrate with Inosio to receive tenant payments; coordinate work orders and retrieve applicants. For a guide on publishing with Inosio see help document [R-781 Publish to Inosio](#).

## Quick Links to Topics

### Set Up – One Time Only

- A. [Create Portfolio](#) in Inosio and Generate Token to Paste into Landlord 12
- B. [Verify Bank Account](#) code setup in Landlord 12

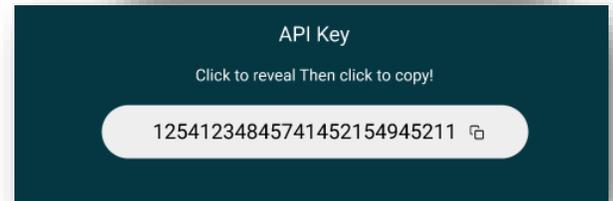
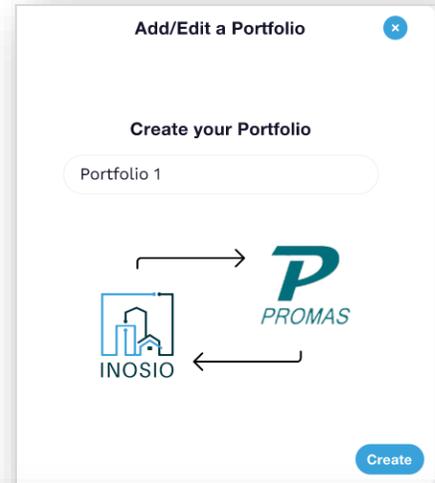
### Integration Related Tasks

- C. [Send Tenant Balances](#) (Synchronize with Server) to Inosio
- D. [Load receipts](#) from Inosio
- E. [Retrieve Work Orders](#)
- F. [Retrieve Applicants](#)

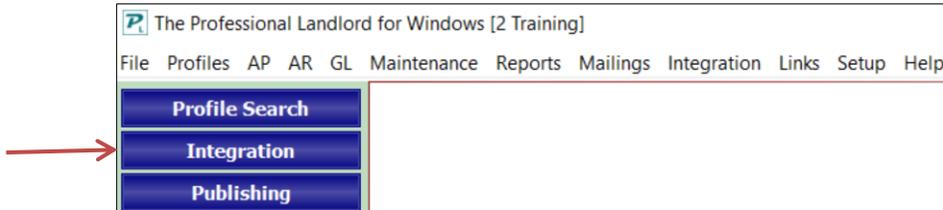
## A. Create Portfolio in Inosio and Generate Token to Paste into Landlord 12

1. Go to Inosio.com
  - a. Create Portfolio
  - b. Click Add Integration to Add a Promas Database to your Inosio Account
  - c. Click to Reveal API Key. You will not have access to this key again.

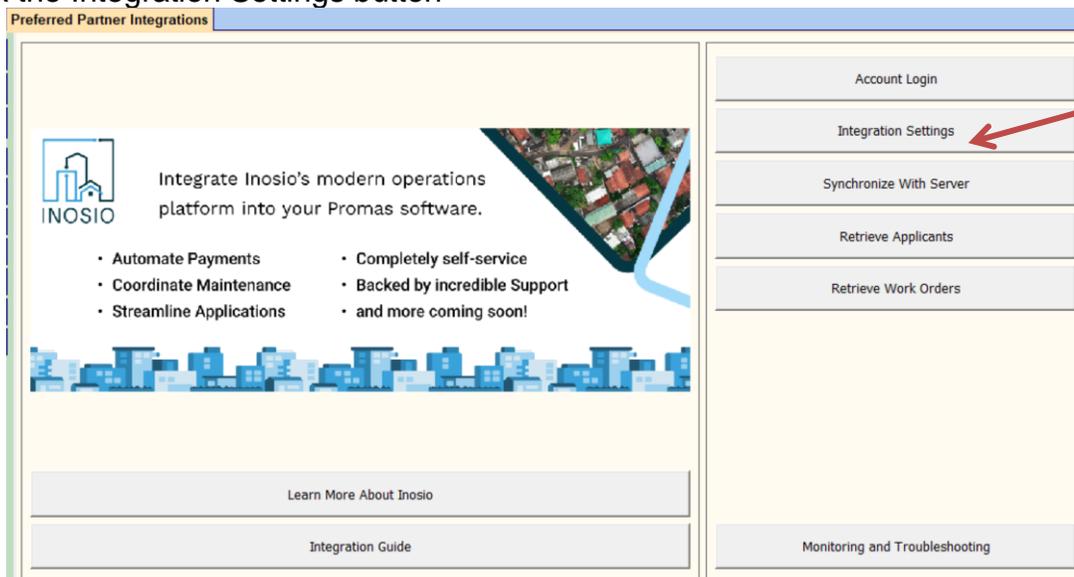
*Do not store API token in plain text. If you lose your API token, a new token can be created to use which makes the old token inactive.*
  - d. Click to copy API and Open Landlord 12 to paste.



2. Go to Landlord 12
  - a. Click on the Integration button on the left of the dashboard.



- b. Click the Integration Settings button



### c. Paste Token from Inosio

Inosio Settings

Inosio

User Token

Alternate Server

Alternate Security Protocol

Processing Options  Synchronize with Server Daily

Send Data to the Server in the Background

Send Balances After Posting Deposit Slip

Send Balances After Posting Scheduled Receivables

Enabled Features  Applicant Screening

Document Portal

Maintenance Coordination



Restore All Defaults Save Cancel

#### Processing Options:

- Synchronize with Server Daily
- Send Data to the Server in the Background
- Send balances after posting deposit slip
- Send balances after posting scheduled receivables
- Send balances automatically in the background
- Send Maintenance Information with Balances

Mark the top checkbox to sync with the server when the first person logs on each day. Marking the next 3 checkboxes will ensure that balances are sent to Inosio automatically when you post a deposit slip and post scheduled receivables (rent, recurring charges, late fees).

#### Enabled Features

- Applicant Screening
- Document Portal
- Maintenance Coordination

Mark the boxes for which you have signed up with Inosio.

Then <Save>.

## B. Verify Bank Account code setup in Landlord 12

1. In Landlord 12 go to Setup > Account Codes
2. Edit your Bank Account  
*If you aren't sure what your bank is called, go to GL > Bank Account History and use the flashlight next to bank to see the names.*
3. Go to Tab 2 Checking Account Setup and make sure Account Number and Routing Number are correctly filled in

Your sync with Inosio will not work properly if the account and routing numbers are not filled in.

Bank Account Checking [Account]

ID: CHECKING Bank Account Checking Ledger Code: 1010  Active

Account Information

Check Style: Laser MICR Three Part (Top)

Next Check Number: 1756

Signature Memo: \_\_\_\_\_

Account Number: 0020021234

Routing Number: 0001234

Processor ID: \_\_\_\_\_

Federal Reserve ID: \_\_\_\_\_

Bank ABA ID: \_\_\_\_\_

Fees and Balance

Service Charge: \_\_\_\_\_

Returned Item Fee: \_\_\_\_\_

NSF Fee: \$50.00

Minimum Balance: \$0.00

Integration Formats

ACH Out: \_\_\_\_\_

Positive Pay: \_\_\_\_\_

1. Account Options 2. Checking Account Setup 3. MICR Check Setup

Dock Help New Previous Next Save Close

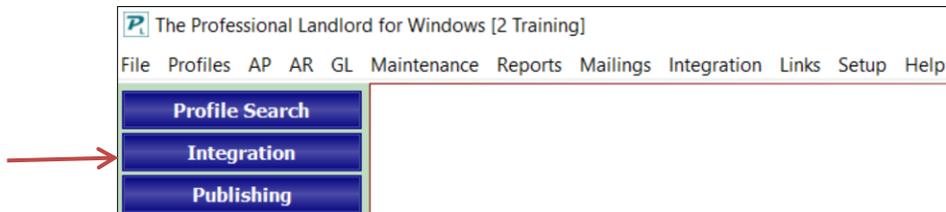
## C. Send Tenant Balances to Inosio

Under normal circumstances there is no need to do anything to send balances to Inosio. See step [A.2.c](#) above. Checkboxes marked there will ensure that balances are sent automatically.

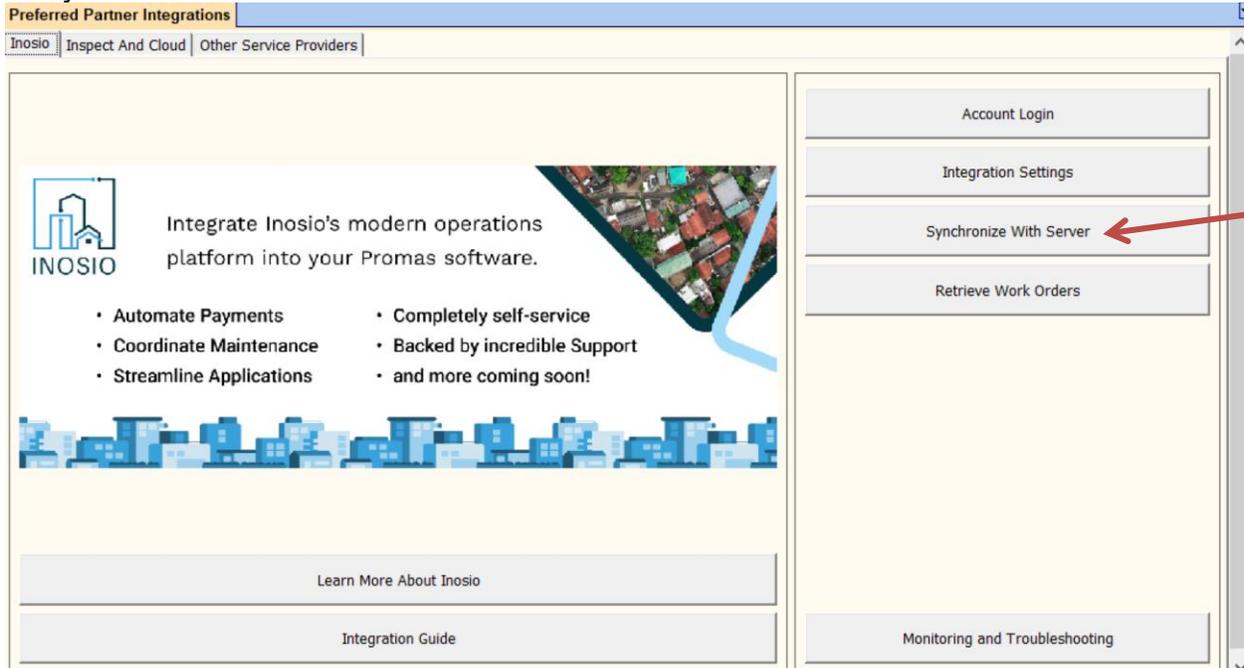
Balances do not include disputed charges.

If you need to send balances for some reason:

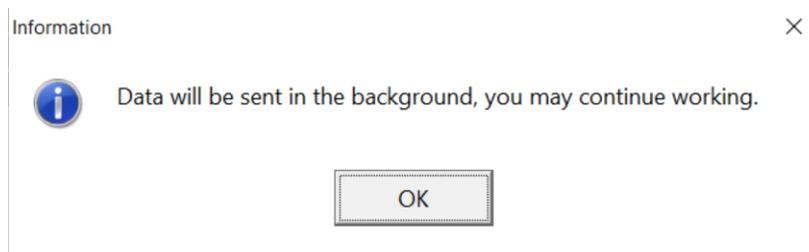
1. Go to Integration.



2. Click <Synchronize With Server>



You will get a message that balances are being sent.



## D. Load Receipts from Inosio

1. Go to AR > Batch Receipts
2. Click Load Receipts from Inosio

Batch Tenant Receipts

Posting Date: 3/8/2022

Unit: [ ]

Tenant: [ ]

Bank: [ ]

Payment: [ ]  Quick Posting Mode

Memo: [ ]

Total Entries: [ ]

Total Amount: [ ]

Load Receipts from Inosio

Add Payment to Batch

Date	Payment Description	Amount

Memo: [ ] Process as Ledger Receipt

Status: [ ] Remove Payment Process Payment

There are two tabs at top, Unprocessed Batches and History

Load Receipts from Inosio Server

Unprocessed Batches | History

Unprocessed Receipt Batch: Deposit on 2/23/2022, \$2,700.00, 3 items, Id: 2732388606925747

Mark Processed Load Receipts

Check Server for More Batches

INOSIO Account Home Integration Guide

Cancel

On the Unprocessed Batches tab use the dropdown arrow to see other batches.

Load Receipts from Inosio Server

Unprocessed Batches | History

Unprocessed Receipt Batch: Deposit on 2/23/2022, \$50.00, 1 item, Id: 4524433009648478

Deposit on 2/23/2022, \$50.00, 1 item, Id: 4524433009648478

Deposit on 2/23/2022, \$100.00, 1 item, Id: 9363081796946967

Deposit on 2/23/2022, \$1,032.00, 1 item, Id: 2774276343810105

Deposit on 2/23/2022, \$2,565.00, 4 items, Id: 6455186897846405

Deposit on 2/23/2022, \$1,450.00, 2 items, Id: 8177022708113454

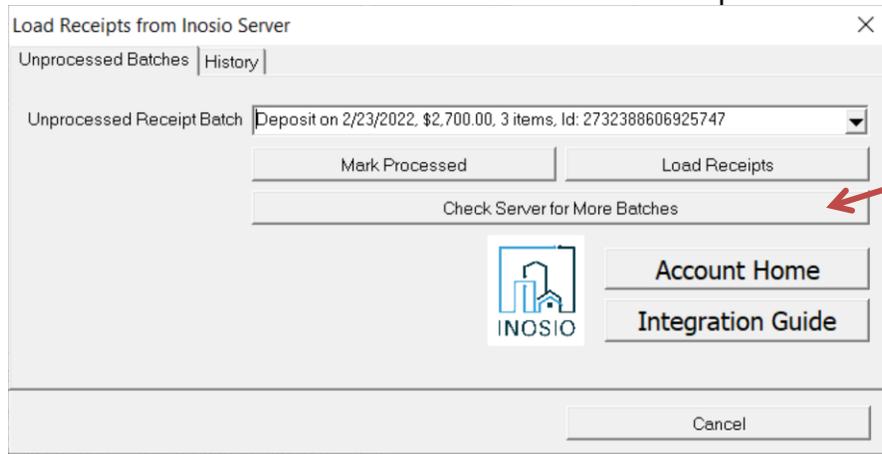
Deposit on 2/25/2022, \$22.00, 1 item, Id: 2530688385335306

Deposit on 2/25/2022, \$41.00, 2 items, Id: 8760846393525238

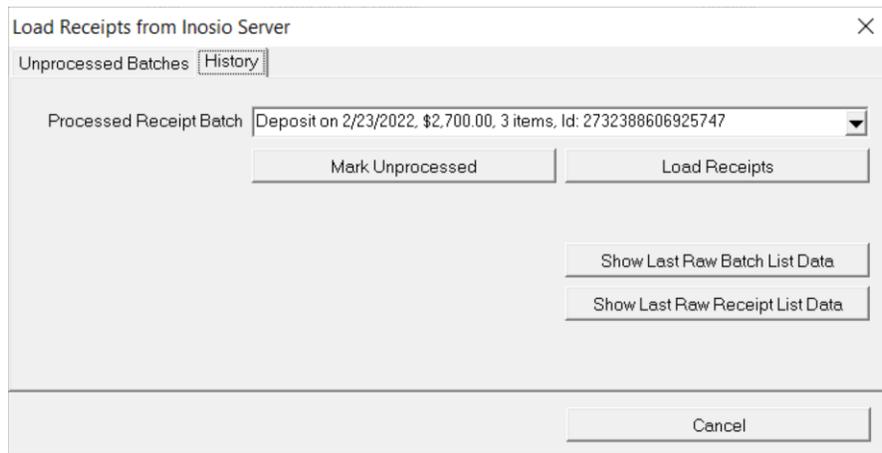
INOSIO Integration Guide

Cancel

Click Check Server for More Batches to check Inosio for new receipt batches

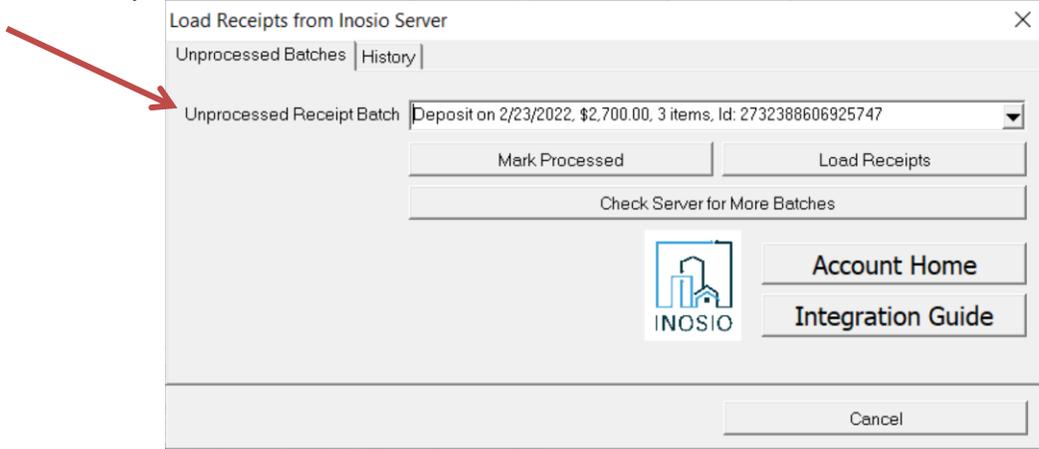


To review already processed receipts, click the History tab.



This screen gives you the ability to re-process receipts if needed by either marking a batch as unprocessed or by loading the receipts. From this screen you can also see the last error message you received. Note that if you load receipts that have already been processed for review purposes only that you should not attempt to repost them.

Click Load Receipts when the batch you want is in the Unprocessed Receipt Batch window.



Click OK on the message that appears about the number of receipts in the batch

Receipt Integrations | Batch Tenant Receipts | Inosio Integration

Posting Date: 3/8/2022 | Total Entries: 3  
Unit: | Total Amount: \$2,700.00  
Tenant: | Load Receipts from Inosio  
Bank: | Add Payment to Batch  
Payment: | Quick Posting Mode  
Memo: |

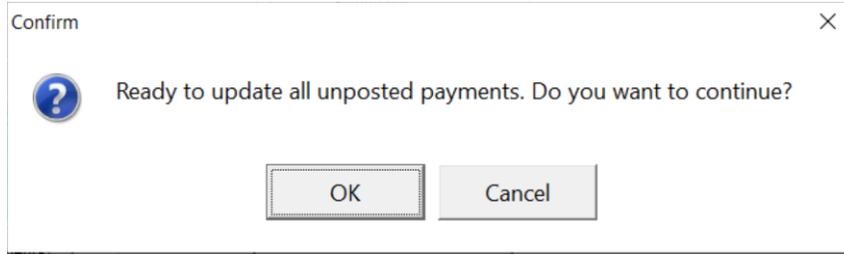
Date	Payment Description	Amount
2/22/2022	Anthony Kmetz for 2118 Oak Street	\$1,200.00
	Memo: Inosio Transaction	Process as Ledger Receipt
	Status: Unpaid charges are \$0.00	Remove Payment   Process Payment
2/22/2022	Anthony Kmetz for 2118 Oak Street	\$1,000.00
	Memo: Inosio Transaction	Process as Ledger Receipt
	Status: Unpaid charges are \$0.00	Remove Payment   Process Payment
2/22/2022	Jerry and Karyl Rodriguez for 2118 Oak S	\$500.00
	Memo: Inosio Transaction	Process as Ledger Receipt
	Status: Unpaid charges are \$980.00	Remove Payment   Process Payment

Sort by Tenant | Start Over (Delete All Payments) | Load Payments from Lockbox File  
 Sort by Unit | Update All Dates | Save Unprocessed Batch to Lockbox File

All Payments | Payment Not Equal to Unpaid Charges | Payment Equal to Unpaid Charges

Follow normal batch receipt processing.

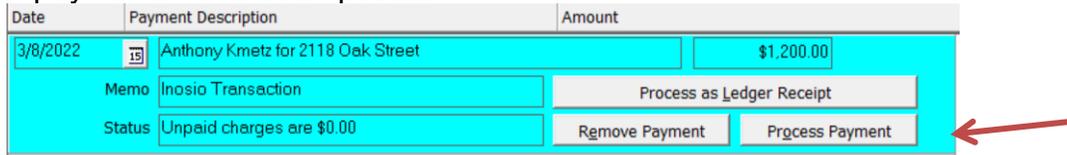
Clicking on the Update All Dates button will change the dates on the receipts to the date in the Posting Date field. You will get a warning message before the dates change.



Clicking on a line will display additional information about balances.

The tabs at the bottom can be used to display only the payments not equal to the unpaid charges, or those equal to the unpaid charges.

Payments that don't equal the unpaid charges can be viewed on the Payment Not Equal to Unpaid Charges tab. You can Remove Payment or Process Payment. If you click Process Payment you will be taken to the Tenant Receipt Screen where you can choose how to apply the money. You can also wait until the other payments have been posted.



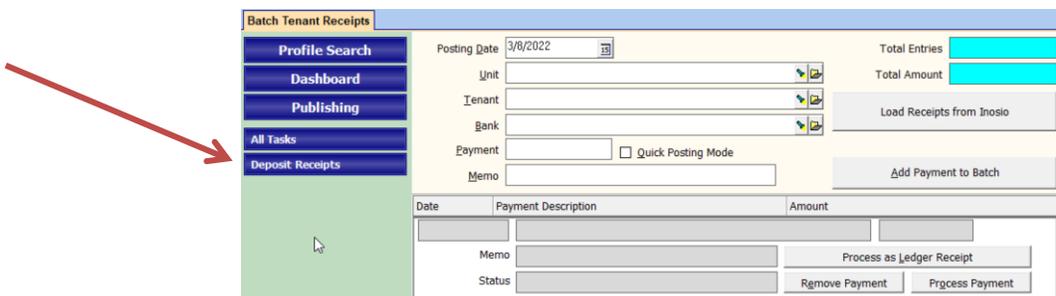
Click the <Report> button to print the report.

**Post Batch Receipts**  
March 8, 2022

Unit	Tenant	Posting Date	Amount	Memo
2118 Oak Street	Anthony Kmetz	3/8/2022	\$1,200.00	Inosio Transaction
2118 Oak Street	Anthony Kmetz	3/8/2022	\$1,000.00	Inosio Transaction
2118 Oak Street	Jerry and Karyl Rodriguez	3/8/2022	\$500.00	Inosio Transaction
			\$2,700.00	
Count				3

Click <Post> to post the payments. That will post payments that match the unpaid charges. The remaining payments will still be on the screen to be processed individually.

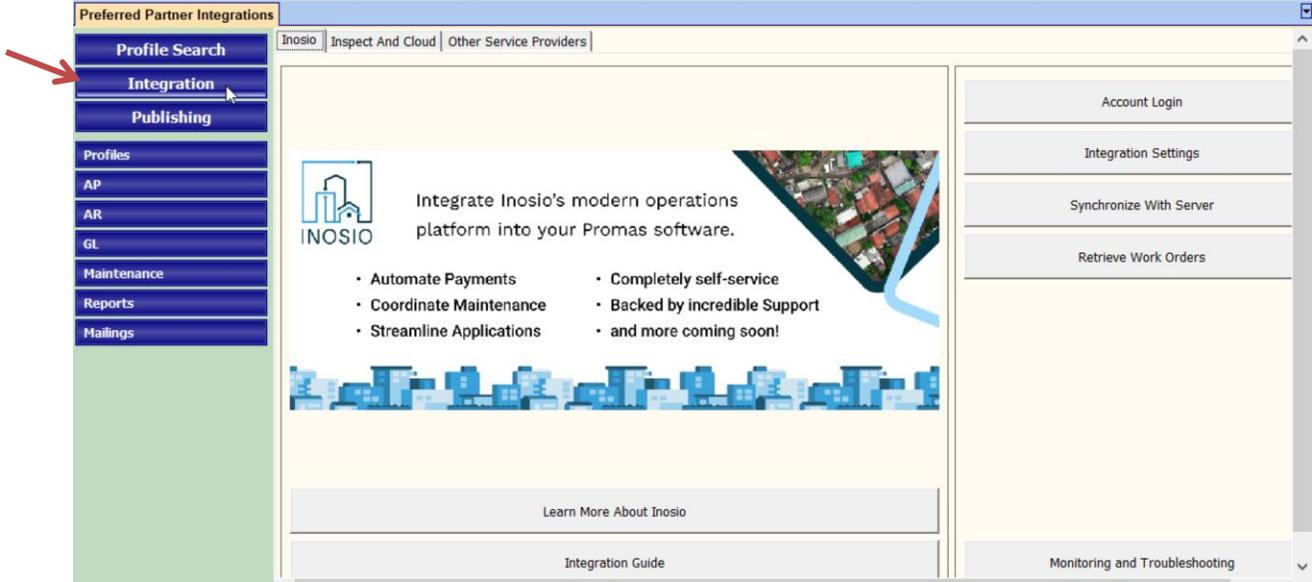
Click the Deposit Receipts button on the left to process the deposit or go to GL, Deposit Receipts.



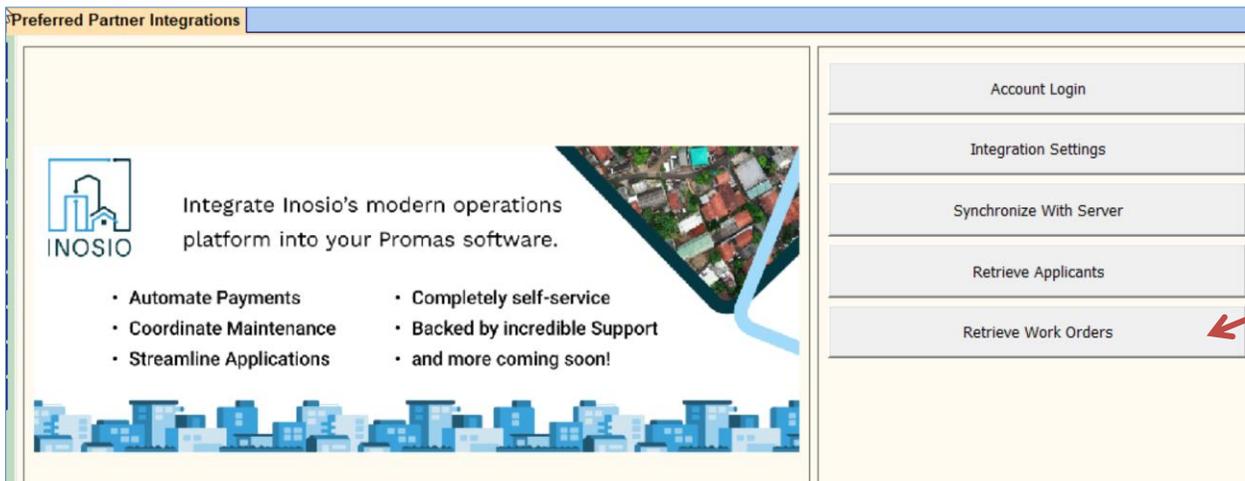
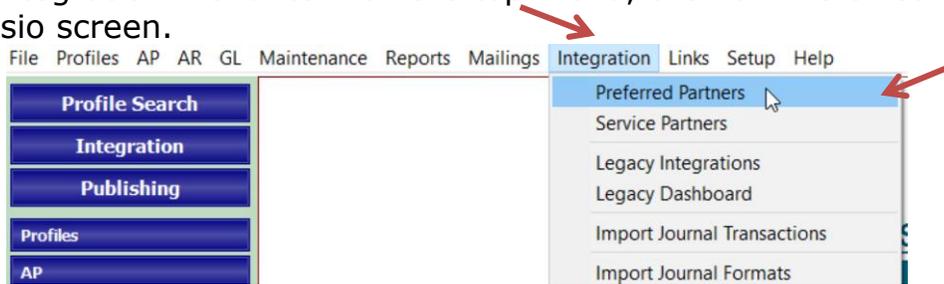
## E. Work Orders

It is possible to enter work orders in Inosio and have the information create a work order in Promas. Use the button Retrieve Work Orders. That button can be found in 2 ways:

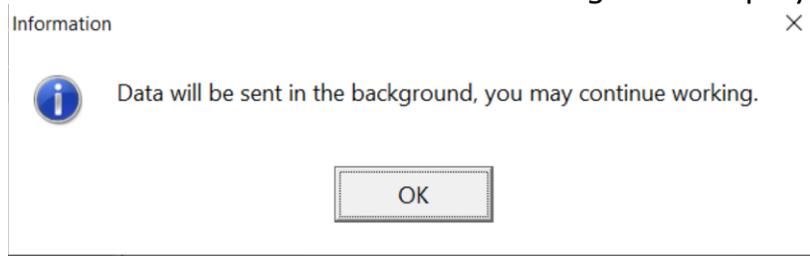
1) Click the Integration button on the left of the Dashboard. That brings up the Inosio page of Preferred Partner Integrations.



2) Click on the Integration menu item on the top menu, then on Preferred Partners to bring up the Inosio screen.



After clicking the Retrieve Work Orders button a message will display as shown below.



Those work orders will then be visible in Maintenance, Work Order History.

**Work Order History**

Reported	Status	Priority	Name	Site	Vendor	Maintenance Type
8/3/2019	Vendor Notified	Normal	212 Main - Tree	212 Main Street	Lawn Doctor	
8/10/2019	Invoiced	Normal	436 Fairway - Plumbing	436 Fairway Drive	Victor Garcia	Plumbing
8/15/2019	Unassigned	Normal	124 Walnut Road furnace	124 Walnut Road	Hero Electric	
9/30/2019	Unassigned	Normal	WB201	Willow Brooke 201	Victor Garcia	
5/30/2023	Unassigned	Low				
5/30/2023	Unassigned	High				
5/30/2023	Unassigned	Emergency				
5/31/2023	Unassigned	Normal				

Site: WB201: Willow Brooke 201      Estimate: \$0.00

Tenant: STIEFFEL: Thomas J. Stieffel      Cost Limit: \$0.00

Ledger: NU: NUZIG Inc.      Total: \$0.00

Vendor: GARCIA: Victor Garcia

Asset:

Reported: 9/30/2019      Vendor Notified:      Required By:      Work Started:      Work Completed:       Enable Filter

Tuesday January 28, 2014 at 3:38 PM by LYNTuesday January 28, 2014 at 3:38 PM by LYN

Filter Edit New

1. All Work Orders / 2. Not Resolved / 3. On Hold / 4. Resolved / 5. Not Invoiced / 6. Unassigned

Work orders that have been downloaded from Inosio cannot be edited in Promas, only viewed. From the Edit work order screen click the Browse to Work Order button to go to the login screen for Inosio where you can log in and edit the work order. It will automatically update the work order in Promas.

**Work Order History** [Work Order]

ID: 101022       Mark for Printing      Status: Unassigned

1. Problem Report | 2. Vendor Assignment | 3. Account Billing | 4. Asset & Warranty

Problem Report

Priority: Low      Problem Description: Carpet has reached its age and is ripping. This is a tripping hazard and unsightly.

Reported: 5/30/2023

Reported By:      Insert Time and User Initials

Phone Number:

Site:      Show Alerts

Tenant:      Ledger:      Notification:  Notification Required: Notify Oscar The Grouch at 11234567898

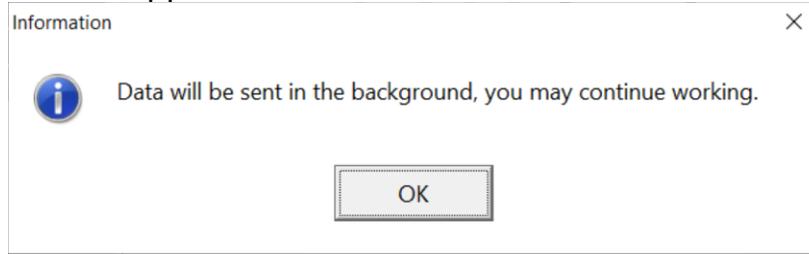
External ID: 101022      Browse To Work Order

External Status: Completed      Work Order Information

Last Modified: 6/23/2023

## Retrieve Applicants

After clicking the Retrieve Applicants button the screen below will display:



Applicant profiles from Inosio will be loaded into the Profiles>Applicant function. Once an applicant is accepted it never changes on Inosio.